

Success Story

WORKBOOKS HELPS KAHOOTZ SIMPLIFY COMPLEXITY AND AUTOMATE ITS SALES PROCESS

How Kahootz added scale to the business and reduced reporting times by up to 90% with CRM.



“WORKBOOKS IS ALWAYS OPEN ON MY DESKTOP – IT PROVIDES ME WITH A SINGLE VIEW ON THE TRUTH, A CLEAR PICTURE OF WHAT’S GOING ON IN THE BUSINESS.”

John Glover - Sales & Marketing Director, Kahootz

KAHOOTZ

Kahootz is a secure cloud-based platform, which enables collaboration between teams spread across multiple organisations. The platform can be customised for many different purposes, including project management, tender management, client portals and much more.

The majority of its clients are high profile government organisations, including the NHS, Cabinet Office and Ministry of Defence (MOD). Kahootz enables MOD teams to work collaboratively and share highly confidential information with external organisations.



MANAGING COMPLEX RELATIONSHIPS BETWEEN ORGANISATIONS



FASTER, MORE ACCURATE REPORTING



CONNECTING SALES & MARKETING FOR GROWTH

CRM – WHERE DID IT ALL START?

As a tech provider, with a business and a brand to build CRM has always been integral to the Kahootz success story. In the early days Kahootz had tried a number of CRM solutions, which didn't fit the bill, including Microsoft Dynamics.

“WE DIDN'T FIND (MICROSOFT DYNAMICS) PARTICULARLY GOOD AT MANAGING RELATIONSHIPS BETWEEN ORGANISATIONS, EACH WITH DIFFERENT BUSINESS UNITS AND VARIOUS CONTACTS WITHIN EACH. IT WAS A NIGHTMARE TO NAVIGATE AND MANAGE THE NUMEROUS SALES CONTACTS, CONTRACTS AND LICENSES. WE NEEDED TO FIND ANOTHER SOLUTION - OUR BUSINESS WAS GROWING IN SCALE AND COMPLEXITY.”

John Glover - Sales & Marketing Director, Kahootz

Kahootz considered a number of CRM solutions, but Workbooks had some stand-out qualities that drew the attention of the management team. A demonstration showed it to be logical, straightforward and easy to use.

WORKBOOKS – SIMPLIFYING COMPLEXITY, FACILITATING SCALE

In particular, the relationship customisation function appealed to Kahootz. The structure of its client organisations and the network of different business areas, contacts and relationships with external organisations is highly complex – when you consider the associated contracts, renewals, quotes and licenses, it is clear the connections needs to be mapped. The design of Workbooks' CRM solution allows Kahootz to do this.

As John says, “A Software as a Service (SaaS) environment is very dynamic and you need a multi-dimensional tool to map the complexity, from lead and pipeline management to quote and order management, through to contract control and renewal reminders. Workbooks enables us to map our client organisations, which helps us manage our own financial operation. When we were pulling information from multiple spreadsheets to see who needed to be invoiced and when, the whole process was much more time consuming and prone to errors.”

CHAMPIONING AUTOMATION

Automation has been a key driver for Kahootz. The plan was to remove as many touch points from the sales process as possible, to free up the sales team to focus on more strategic tasks and to improve profitability. Kahootz realised the more elements that could be automated, the more scalable it would be.

This has been particularly important with G-Cloud clients. There are multiple frameworks (agreements between the government and suppliers), different contracts with each organisation and then multiple licenses within each contract. As Kahootz is a SaaS model, managing contracts, renewals and quotes could be a headache, but because Workbooks automates renewal notices, invoice generation and documents contract finalisation, it is a seamless process.

G-Cloud reporting has also improved, Kahootz provides a monthly report to the Crown Commercial Service on sales made in each of the frameworks. It previously used to take the sales team 4 hours to complete, but now the reporting templates are set up in Workbooks and data can be extracted directly the process has been reduced to less than 30 minutes - almost a 90% reduction in time.

TAKING SALES TO ANOTHER LEVEL

CRM has been invaluable to the Kahootz sales team. It helped them embed a new business process, incorporating best practice and integration with the marketing function. The Kahootz team is currently working with Workbooks to improve the management information derived from the system and enable visibility across the whole sales cycle - the aim is for them to be able to analyse what's happening across the pipeline, look at conversion rates, the win/ loss ratio and where deals are in the cycle. And importantly, it will allow the team to make forecasts on lead generation, conversion ratios and sales revenue.

RAISING THE MARKETING BAR

CRM has significantly improved Kahootz's marketing operations with its integrated marketing automation and lead generation suite, powered by CommuniGator. Previously, all data was held in Hubspot and there was no integration with the CRM function, meaning marketing and sales activities were disjointed.

The advent of GDPR - plus the launch of a new website - prompted Kahootz to move everything on to one platform so data would be held in one place and it would provide a "single source of truth," vital for meeting GDPR compliance. It also enabled the company to perform lead management, sales, invoicing and renewals using one system. Additionally, Kahootz is now able to set up onboarding emails and have visibility of all marketing communications activity within Workbooks - at a glance the team can check data on click throughs, opens, unsubscribes etc.

"CULTURALLY, WORKBOOKS IS VERY SIMILAR. LIKE US THEY ARE A HIGH-GROWTH TECH BUSINESS AND HAVE ALWAYS UNDERSTOOD OUR AMBITION. IT HASN'T JUST BEEN ABOUT THE TECHNOLOGY - THEY HAVE HELPED US DEVELOP A CRM MENTALITY THAT HELPED US HONE OUR SALES APPROACH AND ACHIEVE OUR SALES OBJECTIVES."

John Glover - Sales & Marketing Director, Kahootz

MORE THAN A VENDOR

Like Kahootz, Workbooks is an SME and a privately-owned UK SaaS business, so the management team felt that they had a lot in common. John comments, "Culturally, Workbooks is very similar. Like us they are a high-growth tech business and have always understood our ambition. It hasn't just been about the technology - and they have helped us develop a CRM mentality that has helped hone our sales approach and achieve our growth objectives. They are a true partner".

IN A NUTSHELL – THE KEY BENEFITS

- Providing a 'single source of the truth' - from sales performance to website visits gives the sales and marketing team a holistic picture.
- A single platform incorporating lead-management through to sales, invoicing and renewals.
- Enabling increased sophistication of the digital marketing process.
- Automation has improved efficiency - it has driven down reporting time by almost 90%.
- CRM has improved the Kahootz sales process and made the lives of the sales and marketing team much easier.

About

INDUSTRY

Technology

NUMBER OF EMPLOYEES

10

IMPLEMENTATION DATE

Sept 2010

TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Pro
- Communigator
- Workbooks Exchange Server

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