



...IT security

## Metadigm Limited Case Study

### About Metadigm Ltd


Metadigm is a specialist provider of network and security solutions based just south of Cambridge. With over 20 years experience they are a trusted leader in their field with a client base spanning over 20 vertical market sectors.

Like many resellers and system integrators, Metadigm had adopted a number of applications to underpin its customer and supplier-facing operations, including spreadsheets and an in-house customer

database. Nick Scott, Director at Metadigm, said "We were painfully aware that as the needs of the business had evolved, the use of a variety of non-related applications had become less appropriate for our needs as well as being cumbersome to use."

### Complicated Processes

Specific problems included a complex and time-consuming quote to invoice process which needed input from both the sales team and sales support. The production and review of sales pipeline information was manually intensive and didn't provide real-time sales metrics. Additionally, technical support wasn't integrated with the rest of the business so, for example, sales couldn't see any open technical issues that might impact on them contacting customers for renewal business. In summary, data was held in multiple sources and gave limited visibility of information across the organisation.

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*Nick Scott*

Metadigm's Directors knew that to operate more efficiently and profitably they needed to find a CRM system that would streamline their processes, and align the technical support function onto a common platform with the rest of the business as well as being easy to learn and use. Their search included evaluating some of the most well-known CRM applications including Salesforce, MS Dynamics, ProspectSoft and GoldVision, as well as Workbooks.

### Understanding Needs

The Workbooks team spent time with key personnel at Metadigm, gathering information on how their current processes work and gaining an understanding of what Metadigm wanted to achieve. As a result, Workbooks were able to revisit Metadigm and demonstrate a configured prototype that met their current requirements and which could grow with them as their needs evolve. "Workbooks provided a 'joined-up' record of all our customer-facing activity", commented Nick Scott, "and we were quickly able to see how holding all our data in one place would help in streamlining our processes".

### Tailored Solution

Metadigm decided to invest in Workbooks Business™. The Workbooks implementation team worked closely with Metadigm and delivered a solution that included custom fields, customised document templates and reports and tailored training materials to ensure that Metadigm's processes could be handled effectively.

**“**We bought Workbooks because it offered broader support for our business than the CRM alternatives we considered. We benefit from Workbooks in all our customer facing functions and recover the cost of our subscription through improvements in our order management alone**”**

*Nick Scott*

The implementation resulted in a much simpler process for producing all sales transaction documentation as well as enhanced visibility of the order fulfilment process. Sales force automation resulted in improved sales team performance, with much smoother lead handling, opportunity management and sales forecasting. Key sales data became much easier to collate and analyse, allowing accurate and timely forecasting. Technical support data is now shared with the rest of the business, delivering greater visibility of support issues and customer support entitlement. Overall, the quality and relevance of management information across Metadigm has been greatly enhanced.

Nick Scott is delighted with the company's investment and concluded "We bought Workbooks because it offered broader support for our business than the CRM alternatives we considered. We benefit from Workbooks in all our customer facing functions and recover the cost of our subscription through improvements in our order management alone."