



**northdoor**  
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## Northdoor Customer Case Study



### Background

With offices in London and Dublin, Northdoor has been implementing IT solutions for customers in the financial services sector since 1989. As one of IBM's leading partners in Europe, Northdoor's 100 staff are focused on high performance IT, delivering consultancy, hardware and application deployments, IT support and managed services.

Northdoor had been using Salesforce.com as its CRM system to manage customer engagement and track sales pipeline. AJ Thompson, Sales Director of Northdoor, said "Salesforce.com was fine for managing our customer contacts and tracking deals, however it didn't extend to include sales order processing."

### Sales Order Processing – Reducing Costs & Increasing Productivity

A key element to Northdoor's business is the supply and implementation of IT infrastructure. As with many System Integrators, orders placed on Northdoor include products that must be purchased from key suppliers. Their procurement process dictates that a supplier quotation is required before a Purchase Order can be

generated. Once all the goods are received an implementation plan can be confirmed, engineers assigned and the project can commence. All this information needs to be communicated to both the customer and the sales team.

"Prior to Implementing Workbooks Business Edition, we had a manual process for sales order processing and invoicing" said Lorraine Blackwell, Customer Services Manager. "We used to have to create paper records in order to capture all the necessary data on a deal by deal basis; our CRM and quoting tools worked in isolation and as a result there was duplication of data. Since implementing Workbooks we now have a central repository for all quotes, orders and invoices, enabling tracking and reporting at the click of the mouse. The system has also significantly reduced the amount of order administration."

"Since we have implemented Workbooks we can, quickly and easily, convert a customer quotation into a sales order and then seamlessly create a supplier purchase order. At every stage it pulls through the line item details, including sale prices and costs." She continued, "Then I can, with a final click, create a PDF purchase order document to send to our suppliers – we can now process orders in half the time".

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*Lorraine Blackwell*

### Beyond Salesforce.com

As part of the implementation process Northdoor moved their sales team across from Salesforce.com to use Workbooks.com.

AJ Thompson said “Switching from Salesforce.com to Workbooks.com was pretty straight-forward as the Workbooks team helped us with the data migration. Workbooks has all the same functionality we used in Salesforce.com, but in addition our sales team can now track the progress of orders, and can now see a customer’s order history. Having all the transaction data in one place has had real benefits for our business,” he continued.

“ The Workbooks implementation has been a success for our business, we now have better visibility of business metrics, have streamlined our sales order processing and reduced our operational costs significantly. It makes our business much more efficient and it’s also pretty easy to use, which is a plus!

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### Implementation

Workbooks.com service delivery teams worked alongside Northdoor to ensure the implementation was a success, providing configuration advice and end-user training.

Lorraine Blackwell explains “We use Workbooks standard capabilities to create custom fields and reports to ensure the application met our requirements, with the Workbooks.com team providing guidance along the way. Because the Workbooks application is very ‘windows-like’ it was very easy to migrate everyone across and there was minimal training required - in fact our entire sales team was trained in a day!”

AJ Thompson concluded “The Workbooks implementation has been a success for our business, we now have better visibility of business metrics, have streamlined our sales order processing and reduced our operational costs significantly. It makes our business much more efficient and it’s also pretty easy to use, which is a plus!”