

The blueprint to Zest Publications' success



Customer

Zest Publications

Industry

Publishing

Location

UK

Solution

Sage CRM

Providing a marketing vehicle for a huge range of local businesses, Zest Publications produces and distributes a monthly magazine to over 120,000 homes via Royal Mail. The company's profitability depends on filling each of the four regional editions every month with as many as 500 adverts. This presents a huge range of logistical challenges for the company.

According to Peter Armer, the Managing Director and owner of Zest, there were great opportunities for growth, but these would have needed "an army of people".

"We knew that we could extend our reach into other areas," Peter said. "We needed to find a way to make our business model scale in every area, from people and office space to paperwork and processes."

Peter and his team also recognised the importance of automating processes from first contact to advert proofing and billing.

"We needed a step change in the way we did business on a day to day basis, if we were going to achieve our strategic aims."

Peter asked Rachel Cullen from Bay Management Solutions to research and implement a new business information system into the growing publishing business. The primary aims was to provide a fully scalable system for a growing company.

According to Rachel it was clear from the start that it wouldn't be possible to use the existing staff to push the project through. "The team were needed to keep the business running, it was very finely balanced" says Rachel.

"Zest also had a very low base of IT infrastructure, with poor networking, CD ROM backups, and a heavy reliance on three-part NCR booking forms and handwritten paper records in lever arch folders. There was a huge amount we could do with technology to improve efficiency and drive growth right across the business."

'We now have a single point of data entry, access for everyone to the same information, and greater visibility on transactional and payment history'

Peter Armer
Managing Director and Owner
Zest Publications

Challenge

Zest Publications needed to automate its business processes to become more productive and grow.

Solution

Sage CRM equipped Zest with a fully scalable CRM system to help it drive growth, improve efficiencies and achieve its strategic business goals.

Results

Sage CRM has transformed the way Zest do business by providing greater visibility of its customers. Through customised dashboards and reports, Zest are now able to react faster when sales are made and provide the customer with an excellent personalised service.

‘The implementation has been enabling for us... soon we’ll have our team working on their iPads while sitting with our clients in their offices. There are so many possibilities. It’s very exciting.’

Peter Armer
Managing Director and Owner
Zest Publications

Initially Vicky Zorab, Operations Manager at Zest, created a process map of the “current approach” which Rachel and Vicky then used to work out what they could do to streamline the business.

The goal was always to make things work more efficiently for everyone, internally and externally. The process map highlighted the need for workflow, partly to reduce errors and increase turnaround times, but also due to the physical separation of many of the people involved in each process.

Monitoring the time each booking spent at each stage of production via workflow allowed for earlier intervention when production was lagging behind.

Vicky and Rachel realised, for example that the process for handling and signing off client artwork was inefficient and could be better controlled using workflow technology.

They also realised that taking the technology offsite and using a cloud hosted solution would improve the manageability and scalability of the project and enable Zest to grow.

Having clarified what Zest needed, Rachel drew up a short list of products and suppliers that she felt had the capability to deliver the right solution. “It was clear from very early on that many CRM products offer much the same core capability, but it’s what you do with the solutions that makes the difference,” says Rachel.

Entegraty, a Sage reseller, was chosen as the supplier for Sage CRM. This choice was based on the relationship Zest had with the team at Entegraty. The fact that Zest was already using Sage 50 made the choice of Sage CRM easier.

Solution

The implementation of Sage CRM began with a scope day.

Nick Rainbird from Entegraty studied Zest’s current processes and applied a RAD (rapid application development) approach. Most of the planning was completed within four days, and so far it has taken only ten days of Entegraty time, including knowledge transfer and training.

While there was a natural fear of change and everyone had a lot to deal with - not

just a new CRM system, but also new phones, using the internet, and changes to business processes – things went smoothly.

“Once we have 12 months of business in CRM under our belt, I’m confident we will be able to throw away all the binders we used to rely on,” says Peter. “I’ve already sold the filing cabinets which used to be full of the old records, which I think is a great symbolic marker for change management.”

Peter acted as the Programme Sponsor throughout the implementation, but according to him Rachel and Vicky deserve a huge amount of credit. “Rachel and Vicky made it all happen,” he says. “Vicky knows our business inside and out and Rachel brought a wealth of skill, patience and structure to the project”.

The results

The project has transformed the way Zest do business. Any customer can now be knowledgeably supported by anyone in the team, as everyone has access to all the information they need. Previously vital information was often held in just one person’s head, now everyone can “know the customer” before they call.

Everyone can see the entire contact history of previous calls, cancellations, etc., giving them a complete view of every client. The system is so comprehensive that, according to Peter, “If it’s not in CRM, it didn’t happen.”

Zest provides a design service as well as space in the local directories. Projects now appear on the designer’s CRM dashboard as soon as the space is sold. Customers now have an excellent personalised service, as the design team can contact them directly. This means that customers can be sure their advert contains the most up to date information, from the latest promotional details to the specific images that they want used.

It’s also been possible to create new opportunities as everyone knows what they are looking for in terms of size, location, and number of insertions from a client. This knowledge drives the creation of scripts for the sales team to help them build order value and order occurrences.

“Our customers have also seen some unexpected changes,” adds Peter. “They now get their invoices much faster. Adverts can be taken at 0900, the artwork is ready by 1100 and then their bill arrives at 1300. It’s a bit of a shock for long term customers.”

The new system has greatly improved Zest’s cash collection, which is down to 14 days, and there has also been a great improvement in 60 and 90 day debtors.

Savings have been made on input time, commission calculations and mailshots by capturing sales directly into the computer systems and linking that one input record to all production, accounting and reporting systems.

Knowing what’s going on

Sage CRM has greatly improved management information, helped decision making and enabled Zest to keep track of its KPIs.

Figures on discounts are now reported and flagged to management for example. “This doesn’t prevent discounting, but it makes it more visible,” says Peter.

“The current KPI we’ve set for 2014/5 is to offer discounts of no more than 20 percent, but I know we are currently running at 30 percent.”

The new CRM solution allows Peter and his management to see what’s going on, so they can look at what behaviours or processes they need to address to bring this number down.

Zest also now uses CRM to run reports and share information internally, via dashboards, to manage more traditional accounting functions such as late payers. “CRM promotes a much more responsible attitude amongst the team when selling,” says Peter, “as they can see the customer’s history with us and their payment status for example, which means that the sales team can now tackle financial issues upfront.”

Learning from the process

According to Vicky everyone has learnt great deal from the process of implementing the new CRM solution.

“I have thought much more about the integration of CRM to accounting,” she says. “We now have a single point of data entry, access for everyone to the same information, and greater visibility on transactional and payment history.

The process made us all think more broadly about what the whole business needed, not just each department.

“Getting an external set of eyes...was brilliant. The solution has also removed the old fear we had of someone leaving,” she says. “The knowledge is in the business now, not in individual people’s heads.”

“CRM has been an enabler of larger business change with the new owners,” adds Rachel. “People can be too close to their own processes and can’t always see how things could be done better.”

“It has been a truly transformational project, delivered through a high quality product and high quality people,” says Peter.

“The implementation has been enabling for us. We now want, for example, our people in the field to be able to communicate seamlessly back to base. Soon we’ll have our team working on their iPads while sitting with our clients in their offices. There are so many possibilities. It’s very exciting.”

Twelve months on, Zest now distributes two new magazine titles (with several more on the horizon) and has increased the original magazine circulation from three to four regional monthly editions.

Key project goals delivered

- 100 percent of advertising space sold and printed
- A single entry point for key data that would have previously entailed multiple entry points
- More advanced notice so that the artwork is completed on time for publication.
- The ability to see previous advert designs from within the client’s record
- Improved business processes that make it easier for the customer to re-buy
- A better tool for evaluating the amount of print space sold and for forecasting costs
- Greater visibility of everyone’s contribution to the company’s sales target
- Customised dashboards and reports that encourage greater competitiveness and a fairer reward system

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

