

Preact and GoldMine... Circular Distributors

A Case Study

The Background



Realising the benefits of direct marketing, Circular Distributors developed a door drop business over 50 years ago catering to the marketing sector. They are responsible for launching the UK's first ever letterbox distribution campaign delivering free samples of soap powder all over the country. Now part of the TPG Group (the name behind the Royal Dutch Post Office, TPGPOST and distribution and logistics experts TNT) Circular Distributors offer an entire range of letterbox distribution services.

Powered by the latest on-line data systems, sophisticated targeting techniques and over 5,000 trained adult distributors and 140 full-time managers, CD are number one at getting their customer's message into homes. They currently deliver more than 2 billion samples, leaflets and brochures for major brands and retailers, across the UK, every year. Circular Distributors also plan and co-ordinate door drops campaigns throughout Europe, with direct access to up to 140 million households across 14 countries. They are, quite simply, renowned experts in their field.

The Need

With a valuable database of customers, suppliers and prospects, Circular Distributors need a standard database to assist the sales and marketing department. They had been using a UK advertiser and agency contact management product called Genesis, however, "It was simply not doing the job for us, not letting us work to our full potential and didn't have the advanced functions we needed," states Account Manager, Leah Hendin. "It is also essential that we be able to log calls and have scheduling, forecasting and calendar features. Genesis didn't offer this and also had a lot of corrupt error problems for the IT department to deal with."

CD needed a product that could be used centrally within the organisation, which everyone could access and continually build upon. In 2004, the organisation set out to look for a solution and a solution provider that would:

- 1) Provide a centralised location for all sales and marketing call logging and campaign monitoring as well as scheduling and calendar features
 - 2) Enable easy input, monitoring and reporting of sale information
 - 3) Equip the remote users, two office locations and Account Managers/Directors with the ability to access and update their database outside of the office through synchronisation
 - 4) Synchronise the sales information with their bespoke invoicing system
 - 5) Assist with transitioning the entire company toward a paperless office
 - 6) Be easy to implement, train and use on a daily basis
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The Solution



For Circular Distributors, making GoldMine their choice was an easy decision. Senior Account Manager, Ian Lacey states, "Having used this system at another company I had seen the benefits for Sales Staff. CD works on Account Management rather

than traditional sales therefore information is key. With Goldmine the information is fully accessible and transferable. This system may prove to be the most valuable tool that we have."

CD selected Preact as their solution provider and having checked and confirmed GoldMine would meet their requirements they began with consultancy sessions and a workflow document which carefully laid out the entire GoldMine plan. This document is an integral component in the Preact ethos also doubles as a checklist for everyone involved in the process. Incorporated in this document is everything that will be completed including installation, configuration, training and technical support.

Ian Lacey thinks highly of the Preact approach. "Their personal touch went a long way in sealing the deal. They ensured we had all the necessary information to make decisions and I was very impressed by the product knowledge of the Pre-Sales and Technical consultants."

Preact worked through the installation, configuration, and training over 6 days to ensure the box-standard database was custom-designed and catered to every need agreed upon by CD. Then, by 2005, Preact had all remote users and both locations of Circular Distributors in Manchester and Maidenhead benefiting from the GoldMine products as well as their exceptional technical support services.

Preact have provided CD with a cost-effective solution catering to every requirement identified. They are currently using GoldMine, GoldSync, and GoldBox. In addition, the Microsoft Outlook link for GoldMine is used to ensure everyone in the company who are not using the product in their department can view the GoldMine calendar.

The Result

The tangible results for Circular Distributors were immediate because now everyone company-wide is kept in the same communication loop and tasks are not duplicated. Leah Hendin boasts, "the more we use it the more effective we see that it is. With so many sales people in different locations a lot of our jobs overlap. With Goldmine we collaborate better and easily see what others have already learned about a prospect or done with a customer."

Helping Marketing...GoldMine helps the Marketing department on various levels. It is currently used for mailings and telemarketing. The database is the central location of all prospect and current customer information and is depended upon by the sales department. In addition it has helped ensure CD complies with the Data Protection Act.

Helping Sales...GoldMine is vital to the success of the sales department. The product is used for research, contact management, CRM, logging calls, telesales, analysis, reporting, and to keep track of all appointments and jobs booked. Additionally, with over 50 users on the sales staff including two offices in Maidenhead and Manchester, as well as remote users and road warrior sales staff, the synching capabilities of GoldSync ensure the database is visible by everyone.

The sales team also use it for territory alignment, forecasting, completing sales and looking at budgets. They will be making use of the Crystal Reports feature in the future since it is included with the Corporate Edition (SQL) version of GoldMine.

The Telesales Department are able to closely monitor and to see how far their leads go. Calls are easily scheduled to the telesales team and they simply move through their list, log the information and it is all then filed automatically to the history tab and visible to everyone in the company no matter if they are in Manchester, Maidenhead, or synchronising from home. The telesales staff speaks highly of the product. "The Multimaps link on the GoldMine View HTML tab is incredibly helpful when arranging meetings, as this allows me to group appointments by the correct location. I also use the opportunity manager a lot to understand

what calls are to be made and can therefore follow the pipeline," says Telesales Executive, Daniel Kuhner.

Helping Everyone...

GoldMine automatically links every communication with a contact to the history tab so everyone can see who is the account manager, where each customer is in the sales cycle and also build nearly any sales and marketing report required. With the old Genesis system this was not possible.

CD praise GoldMine's features and its results. Ian Lacey states, "we use it to find out who a company or agency Account Manager is and know who to pass any incoming business to. It also contributes to efficiency within the organisation since it's visible to all users and is the major facilitator in becoming a totally paperless office."

By using GoldMine the company is certain not to quote incorrectly. In addition, they know who competitors are for each transaction and how they factor into their sales proposals.

Circular Distributors also praises the efforts of their supplier. CD selected GoldMine on their own doing but without the meticulous efforts of a knowledgeable supplier this project would not have been as successful. "Preact have been very helpful. The individual training sessions have assisted our knowledge of the system and how to get the most out of it. They also raise awareness of new products that can help streamline process and ways of making the system more personalised to the way CD works," states a very pleased Leah Hendin

Continuing the praise of the product and their solutions provider, Leah declares, "If we didn't have Goldmine the consequences would be potentially devastating. There would simply be a lack of knowledge company-wide. When you come in as a new salesperson you'd be quoting blind and wouldn't know the history of your customer and prospect base. GoldMine will also help with ensuring employee turnover is not as dramatic an issue. New staff will know at a glance everything about our customers and prospects. They'll know why we may not have won a deal previously and ensure the same mistakes are not made when re-quoting."

Return On Investment

Goldmine is going to continue to be a major contributor to the success of Circular Distribution. The product has made the entire organisation more efficient in a short span of time. They know what the last action with every contact has been and can view all sales quotes without needing to look through files. "Basically, we are automatically building up an easy access rate card that everyone can benefit from," says Ian Lacey. "All CD customers will have a slightly different quote and with GoldMine the staff are able to see what has been previously said or quoted to clients while ensuring they are providing the right payment terms and do not risk appearing unprofessional."

GoldMine and Preact are helping Circular Distributors save money, time and resources by making sure they do not have to re-do paperwork and helps avoid costly mistakes. Leah Hendin concludes, "GoldMine provides the option to link documents like prospect letters, quotes, and proposals, to GoldMine. I am certain it will provide an immeasurable return on investment in the future."

4 Lake End Court, Taplow, Maidenhead, Berks, SL6 0JQ
Phone: 0870 382 5000 E-Mail: sales@preact.co.uk
Website: www.preact.com

