

CASE STUDY

The Salesforce CRM Accelerator

Helping leading academic publishers progress in their journey to better customer insights through our quick-start Salesforce solution.

Introduction

[Ribbonfish](#) has been working with publishers for over 12 years, which means we've seen it all. As well as having an understanding of the publishing process, the people you collaborate with and the tools involved, we have first-hand insight into the technology barriers that, in particular, sales and marketing teams in the industry face.

We have coalesced our teams' knowledge to develop our "Salesforce CRM Accelerator" to elevate publishers' journeys to consolidating, capturing and enriching their customer data.

In this case study, you can learn more about the problems the Salesforce CRM Accelerator was created to solve, how leading global academic publishers have used it, and how the platform – together with our expert knowledge – can evolve and develop to address the big challenges in your organisation.

The Accelerator

What is it?

The Salesforce CRM Accelerator (or the Accelerator for short) is our unique end-to-end publishing CRM solution to help academic publishers get started with improving the structure and quality of their customer data.

Built on the Salesforce platform, we have configured the vanilla software with some key CRM features in place as standard, "accelerating" (see what we did there?) the initial part of your journey.

From there, it can be customised, developed and enhanced even further to meet your specific requirements, strategic goals and business objectives. This ensures that your final system works for you and is able to deliver on your vision.

How does it work?

The Accelerator is able to unify marketing, sales, publicity data onto one platform, promoting collaborative working. You get a single source of truth for all transactions with your customers. Your data is structured, consolidated and customisable and includes features such as:

- Flexible custom data fields and workflows without the need for coding.
- Relevant custom account/contact types specifically for publishing – Faculties, Departments, Courses, Press/PR, Libraries, Societies, Authors and many more – each with their own custom data fields, page layouts and other useful defaults.
- Campaigns customised for the many different types needed by your marketing teams.
- 100s of custom fields added to collect data relevant to publishing.
- Opportunities customised for publishing – from book adoptions and subscriptions to renewal and bulk sales – all of which capture custom data and track the sales process.
- A custom ‘quick order’ tool that can be easily configured for each customer – allowing you to quickly process orders from the contact record to send free copies of various different kinds e.g. Sample/Inspection copies, Review Copies, Publicity Copies etc.
- Integration to the MailChimp app, Pardot and HubSpot.
- And much, much more!

Why Salesforce?

The Salesforce platform is the most popular CRM for a range of companies across different industries. Cloud-based and fully mobile-ready, there is no need to plan for in-house infrastructure, back-ups or high availability. The interface is modern, fully customisable by each user, and has all the productivity tools you need at your fingertips.

It’s flexibility allows for creation and configuration of custom data objects, fields and workflows all without the need to write code. There is also a large ecosystem of associated apps and connectors available via the AppExchange, and Salesforce has an open architecture providing an API framework.

The Problems

Our work with publishers has helped us to identify key issues that they face. These include:

- Disparate sources of customer data – from customers to adopters and media
 - Manual and duplicated effort around managing customer data e.g. contact details and correspondence
 - Data quality and consistency issues
- Legacy platforms that are aging, unintuitive, slow, unreliable and unsupported
 - Limited ability to scale and support new processes
 - Slow systems that often cannot be used remotely
 - Lack of open architecture and integration
 - No dedupe checking
 - Inadequate reporting and visualisation capability
- Lack of customer intelligence, history and pipeline
 - Scattergun approach with non-targeted marketing campaigns
 - Inability to measure the effectiveness of campaigns
 - Missed commercial opportunities for up-selling and cross-selling

If these all have left you nodding furiously, then read on to find out how the Accelerator helped to solve these problems for some of our customers...

The Solution

Working with the teams at Bristol University Press, The MIT Press and Princeton University Press, and with their specific challenges, requirements and business goals in mind, the Salesforce CRM Accelerator was able to give them all the benefits of in-built customisations and our industry knowledge to elevate their starting point. It provided a fast-tracked solution that...

- Became the system of record providing de-duplication capabilities to maintain clean customer data
- Allowed the team to unlock the value of their data by identifying cross-selling opportunities through reporting and data dashboards

How did the Accelerator help them to do this?

The sales and marketing teams were set up with a strong foundation, with features as standard including:

1. Bespoke objects and fields for Titles and Courses specific to academic publishing.
2. Customised orders, opportunities and campaigns for the many varied types of products, customers and approaches they needed.
3. A single view to track the whole sales process from beginning to end, and realise new opportunities.
4. Quick orders generated, linking the order as part of a response to a marketing campaign – allowing them to segment and target more effectively.

It also gave them a starting point that was considerably further down the line than with any other CRM implementer without our “accelerated” features. They were able to:

- ✓ **Start at a different level.** Instead of back to basics, they had the step up from our solutions and industry expertise that they wouldn’t have received from other service providers.

- ✓ **Speak their own language.** We met the teams as equals and were able to immediately dial into the issues they cared about. Little adaptations were needed to adjust for publishing or book marketing jargon, which enabled them to tap into our knowledge effectively and set up solutions that worked for their organisation in isolation and also within the industry as a whole.

- ✓ **Remain focused on their core objectives.** Their journey to capturing, consolidating and using their data in a way that works for them was able to feed back into the overall strategies and aims of the organisation. With the initial boost from the Accelerator, they were able to get there much quicker.

The Outcomes

The Accelerator provided the teams at PUP, BUP and The MIT Press with a system that was able to perform the functions most needed by the Sales and Marketing teams. They could start unlocking wins and begin solving their main issues.



Specifically, Princeton University Press has been able to work collaboratively across marketing, sales and publicity. They have been able to break the cycle of working in silos and become much more efficient as an organisation.

Having achieved a single view of their customers, together with the efficiency gains from collaborative working, they now have the opportunity to spend more time engaging directly with their customers, building up a holistic, enriched view of those customers and using this as a springboard for future insights – all with the end goal of putting the customer first.

"Since the Publisher CRM Accelerator went live here at Princeton University Press we have enjoyed so many efficiencies! All our consumer data across many segments is now consolidated in one place rather than in numerous disparate spreadsheets. We are building up a single, enriched view of our consumers and we are leveraging this data to communicate more directly with them. The Publisher CRM Accelerator allows our marketers, publicists, and sales staff to collaborate more efficiently across their respective departments and has integrated beautifully with Salesforce and Hubspot. It has been immensely valuable to have one source of truth that we can build upon to further explore opportunities to engage with our consumers and to ensure we put their interests and needs first".

– Katie Hope, Director of Marketing & Sales at Prince University Press



For Bristol University Press, they have been on quite a journey, firstly dealing with the basics of consolidating all their customer data and ensuring GDPR compliance.

From this starting point they have been able to build their market intelligence and marketing research, and create a 360-degree view of their individual customers and their requirements and needs. This gave them a much clearer idea of customer segmentation, which is now feeding into all of their future campaign planning.

“We could get that clarity, to be able to look at an institution and see exactly what they are adopting. And so we can upsell to them, and we can also contact them, and we hold all of that information in one place, which has been a brilliant upside for us.”

– Jo Greig, Sales and Marketing Director at Bristol University Press



The MIT Press are ready to go live and they are looking forward to gaining efficiencies from having one source of truth and a holistic picture of their customers.

They will be able to track campaigns, adoptions and subscriptions, and pivot to becoming more customer centric through access to good quality data and insights allowing better segmentation/ targeting and promotion. We look forward to hearing more about the benefits they reap in the coming months!

About the publishers featured in this case study

Bristol University Press (BUP)

Bristol University Press, and its imprint Policy Press, is one of the five mid-sized UK-based university presses. They publish editorially independent, peer-reviewed work from global authors in the social sciences and aligned disciplines. The team expanded to 42 in 2020, publishing 210 books and 14 journals. They predominantly sell through third-party sales agents and distribution, with large amounts coming from centrally-driven direct marketing. They had a number of data problems to solve, including missing out on cross-selling opportunities and difficulty in monitoring the effectiveness of their campaigns.

Princeton University Press (PUP)

Princeton University Press is an independent publisher with close connections to Princeton University. PUP is a not-for-profit scholarly and academic publisher that brings influential voices and ideas through academic scholarship. The Press publishes approximately 300 new titles each year in more than 40 disciplines with particular strengths in publishing within the Sciences.

MIT Press

Established in 1962, the MIT Press is one of the largest university presses in the world and is a leading publisher of innovative academic work that falls at the intersection of science, technology, art, social science, and design. They are constantly acquiring new titles, and have books and journals divisions, a bookstore and a Knowledge Futures community group.



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