

Workbooks Partner Program Datasheet

Background

According to Gartner the market for CRM solutions is one of the strongest growth areas of IT, worth over \$10bn annually and growing at over 10% per annum. Software as a Service (SaaS) solutions now account for over 20% of this market. Particularly in the small to medium market sector, SaaS solutions are seen as the logical choice, minimising up-front investment, lowering on-going costs and affording the most flexibility.

With Editions to suit customer requirements ranging from simple helpdesk or contact management, to full-blown CRM including order management and fulfilment, Workbooks

is rapidly emerging as a leader in CRM and Business applications for small to medium-sized businesses.

We recognise the value that Partners can bring to Workbooks customers, whether in helping them select the right solution, supplying, implementing and training, or indeed providing integration between Workbooks and other applications.

As such we have a range of programs which enable and support Workbooks Partners to participate in the Workbooks ecosystem, profiting from bringing value to Workbooks customers.

Reseller Partners

- Enjoy discounts of up to 50%
- Share perpetually in renewals
- Deliver associated Consulting, Training and Integration services

The Opportunity

Workbooks Reseller Partners can participate in the exciting market for SaaS (Software as a Service) CRM solutions by selling Workbooks CRM and Business subscriptions to their clients, enjoying product discounts of up to 50% on new customer contracts as well as on-going discounts for renewals.

Additionally, most Workbooks customers, particularly those with more complex requirements, recognise that paying for professional services to get started is a sensible investment. Whether consulting services for configuration and data migration, or training, Reseller Partners are well placed to provide these services – ranging for a typical project from just a few days to twenty.

Where integration with third party systems is a requirement, Reseller Partners who are able to deliver application integration using the Workbooks API are increasingly in demand.

Because Workbooks is uniquely designed to support multiple relationships, it is possible for one organisation – or person – to be a supplier, customer and competitor; or all three at once. In the same way, Workbooks users can track third-party relationships between prospects and their suppliers, competitors and customers – or the channel partners of a particular organisation.

The Right Support

As a Reseller Partner you will be supported in winning and delivering your projects by our Sales, Consulting and Training teams. We do pass sales leads to our Reseller Partners, but we favour those that show ability and commitment to generate their own. We will of course support you in demand generation activities.

What we need from you

Your sales and consulting teams will be most successful if they're well versed in the Workbooks product suite. We'll invest in training them, but we need your commitment to ensure we get time with your staff.

Depending upon your level of accreditation, we will need you to write a minimum value of new business contracts each year, in order to maintain your partner status and discounts (please see below).

We prefer our partners to use our CRM solutions and offer discounts for this purpose.

Terms

Partner Tier	Partner Discount	Lead Registration Discount Uplift	Minimum Net New Contracts
Premier (15+ Sales People)	Please call Workbooks Partner Sales for details		
Authorised (5+ Sales People)	25%	25%	£40k per annum
Reseller (2+ Sales People)	15%	25%	£10k per annum

There are three tiers of Workbooks Reseller Partner: Premier, Authorised and Reseller.

The prevailing Partner Discount is applicable on all resale business including renewals. However, where a qualified new business sales lead is registered with Workbooks, an additional 25% discount is applicable to any portion of the contract value paid in advance – typically the first year. By registering a lead, effective discounts can be up to 50% on new business.

The minimum net new contracts figure refers to the annualised net value of new subscription contracts placed on Workbooks each year. This new business element of the program is important: By meeting these targets, Partners remain eligible to receive discounts on new business and renewal contracts.

Partners can subscribe to Workbooks CRM or Workbooks Business for their own use at a 40% discount for Reseller Partners and a 50% discount for Authorised Reseller Partners.

Interested in becoming a Workbooks Partner?

Please fill out our Partner Enquiry Form at <http://www.workbooks.com/partners/enquiry> or call us on +44 (0) 118 303 0100.

Consulting Partners

- Deliver Consulting, Training and Integration services for Workbooks customers
- Work closely with Workbooks to win and deliver projects
- Maintain vendor neutrality

The Opportunity

Whilst we have Editions to suit simple requirements for smaller organisations, our larger customers deploy Workbooks solutions across multiple functions in their organisation including marketing, sales, customer services and, order and fulfilment management – tracking the delivery status of customer orders, placing supplier orders, scheduling and recording work associated with fulfilment, and issuing invoices.

Such customers recognise that paying for professional services to get started is a sensible investment.

Typical project phases include:

- Requirements Definition
- Configuration/Integration
- Data Migration
- User Acceptance Testing
- Training

Where integration with third party systems is a requirement, Consulting Partners who are able to deliver application integration using the Workbooks API are increasingly in demand.

The Right Support

As a Consulting Partner you have access to Workbooks resources to help you win and deliver projects. Our Sales Team will provide pre-sales support, and whilst building your Workbooks practice, you can augment your own delivery capability with our Consulting and Training staff – effectively sub-contracting work to us at a preferential rate.

We will introduce Consulting Partners into our projects, favouring those with a track record of delivery. We respect the vendor neutral stance of some consulting businesses, but do of course seek to develop a sound working relationship with all our Partners.

What we need from you

Your consulting team needs to know and understand the Workbooks product suite. Depending upon the size and reach of your business, we may ask you to pay for training in the Workbooks applications, although our primary objective is to ensure that our customers have a choice of capable, reliable Consulting Partners to whom they can turn for implementation support.

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Integration Partners

The Opportunity

Our customers tend to be small to medium sized organisations ranging in size from a few people, to hundreds.

These organisations require other business applications ranging from specialist email marketing, event management and web content management, to accounting solutions, membership systems and payment gateways.

By integrating your application into Workbooks via our API, you make it easy for Workbooks customers to adopt your solution.

The Right Support

As an Integration Partner you have access to the Workbooks API, and a range of online, community and Workbooks resources to support you in scoping and delivering integration between your application and the Workbooks suite.

Depending upon the size and reach of your business, and its relevance to the Workbooks customer base, we may support your integration with the direct cooperation of our engineering team. Our primary objective is to ensure that our customers have a choice of great complementary technologies which integrate readily with their Workbooks applications.

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