

Drive business success with



**Workbooks.com**

**Great customer relationships are the bedrock of a thriving business and the key to success.**

Workbooks provides an affordable, feature rich CRM solution that enables mid-sized organizations to efficiently acquire, convert and retain customers.

It has a powerful reporting tool that helps organizations make sense of their data and drive insightful decision making. It is easy to use and implement, for a quick ROI.



## MORE THAN CRM, WORKBOOKS IS A PLATFORM TO MANAGE YOUR BUSINESS



### MARKETING

- Segment & target
- Capture & manage leads
- Dashboards & analytics
- Campaigns & events
- Marketing automation



### SALES

- Track opportunities
- Manage pipeline
- Monitor performance
- Forecast accurately
- Workflows & approvals



### ORDER FULFILLMENT

- Quotations
- Sales order processing
- Invoicing
- Credit notes
- Digital signature



### CUSTOMER SUPPORT

- Support ticketing
- Service metrics
- Unified experience
- Workflows & automation
- Profiling & renewals

## THE VALUE OF WORKBOOKS



**GROW REVENUE**



**IMPROVE CUSTOMER EXPERIENCE**



**REDUCE OPERATIONAL COSTS**



**IMPROVE DECISION MAKING**

# WHAT MAKES US DIFFERENT?

## *Designed for the mid-market*

Our CRM solution provides many of the features required by small and mid-sized organizations out-of-the-box. The platform is intuitive, and easily configurable to ensure customers get the outcomes they want.

## *Better value for money*

Our CRM license prices are significantly lower than Salesforce and Microsoft (50 - 70%). Our implementation process requires fewer consulting days and is better suited to the budget of a typical SME, speeding up time to value and increasing ROI.

## *A team passionate about your success!*

Our team develops world class software and delivers all the services to guarantee a successful implementation. See us as your trusted advisor and accountable partner. We'll guide you on your CRM journey every step of the way.

DATA MIGRATION ..... IMPLEMENTATION ..... CHANGE MANAGEMENT ..... TRAINING

## WHY CHOOSE WORKBOOKS?

..... HIGH CLIENT RATING & ACCOLADES .....

**GetApp**  
CATEGORY LEADER Q1 2018  
★★★★★

**TrustRadius**  
TOP RATED 2018  
★★★★★

**Capterra**  
★★★★★

**CROWD**  
HIGH PERFORMER FALL 2017  
★★★★★

**WINNER**  
BEST SALES CRM  
PRODUCT OF THE YEAR  
**2017**  
**BESMA**

..... #1 CRM FOR CLIENT SATISFACTION WITH THE HIGHEST NPS SCORE .....



Source: Independent G2 Crowd Summer 2018 Report

..... JOIN A GROWING COMMUNITY OF USERS. .....

OVER 1400 ORGANIZATIONS TODAY RUN THEIR BUSINESS ON WORKBOOKS.