Workbooks

Drive business success with WORKBOOKS CRM

Great customer relationships are the bedrock of a thriving business and the key to success. Workbooks provide an affordable, feature-rich CRM solution that enables mid-sized organisations to efficiently acquire, convert and retain customers.

GROW REVENUE

IMPROVE CUSTOMER EXPERIENCE

REDUCE OPERATIONAL COSTS

IMPROVE DECISION MAKING

WORKBOOKS *for Marketing*

Workbooks CRM helps marketing departments run campaigns and generate more quality leads. Workbooks gives you the tools to execute your marketing strategy and measure ROI.

Marketing CHECKLIST

- **Maximise your lead generation**
- **Manage all your campaigns** and related activities in one place
- Manage your data, **segment and target** accurately
- **Know the ROI** of marketing activities so you can focus your budget on what really works
- **Align to sales** and drive timely follow-up

Data Management & Targeting

Manage account and contact information. Segment your data and make your marketing relevant and timely.

Website Lead Capture

Automatically capture leads from your website via forms. Assign them to queues/campaigns and notify sales.

Lead Management & Scoring

Use scoring to ensure sales spend their time on the opportunities most likely to convert. Automate lead assignment for fast follow-up. Set alerts when follow-up is not happening.

Campaign Management

Gain visibility of all elements of a campaign. Use templates to send targeted emails*. Review performance and track key metrics (from open/click-through rates to ROI) for all campaigns.

Event Management

Plan, organise and promote events**. Enable delegates to self-register and automatically schedule and send communications.

Marketing Metrics

Capture key information such as campaign ROI, lead volumes by source, lead conversion etc. Use reports & dashboards to ensure you have real-time information at your fingertips.

Track Marketing Activities

Manage day-to-day workload and keep on top of outstanding tasks to ensure project milestones are hit and campaigns are delivered on time.

Supplier Management

Manage suppliers' activities and communications in one place. Upload commercial documents & track expiry dates.

PO Management

Raise and easily track the status of purchase orders. Manage and audit sign-off. Manage your marketing expenditure effectively.

Extended Marketing Automation Functionality

- Workbooks *Web Insights*, a web analytics tool to identify anonymous website visitors.
- Workbooks *GatorMail*, an advanced email marketing tool to easily and efficiently target your audience with highly relevant and personalised email messages.

*Emails can be sent using templates in Workbooks CRM, Workbooks GatorMail or via an integration with other leading email marketing solutions.

** Workbooks can integrate with event management platforms like GoToWebinar or Eventbrite.

WORKBOOKS *for Sales*

Workbooks CRM enables sales teams to work more effectively, better identify opportunities, close more deals and grow revenue.

Sales CHECKLIST

- **Improve sales execution** and win more business
- **Manage your sales team** with real-time reporting and activity tracking
- **Increase sales productivity** with automated workflows, easy collaboration and a mobile app accessible anytime, anywhere
- **Improve forecasting** through visibility of your pipeline
- Make **insightful decisions**

Account & Contact Management

Use every interaction to capture knowledge and map relationships. Synchronise with Outlook, Exchange/ Office 365 or Google Apps. Profile customers and tailor your approach.

Track Sales Activities

Record sales activities to ensure that opportunities are progressed effectively and no calls are overlooked.

Opportunity Management

Enforce common methodologies to drive execution excellence throughout the sales cycle and improve conversion rates.

Automated Workflows

Automate repetitive tasks and remove the admin burden so that reps can focus on building relationships and selling.

Forecast Accurately

Enable sales to forecast, easily identify 'best case' and 'commit' and get a view on how likely they are to hit target.

Sales Performance Metrics

Generate reports & dashboards to get real-time visibility into pipeline and individual sales rep performance. Easily identify improvement areas.

Account Management

Get a 360° view of all customer interactions. Track activities, cross-sell and up-sell opportunities and identify 'at risk' customers.

Subscription / Renewal Management

Automatically remind customers when their contracts are due for renewal. Identify renewal rates and predict future subscription levels.

Quotations

Quickly build professional looking quotations. Standardise T&Cs and implement approval workflows.

Order Creation & Processing

Turn quotes into orders with a single click. Track the status of orders as they are fulfilled and invoiced. Use electronic signature for speed and reduced paperwork.

Mobile

Access data anytime, anywhere and from any device using our mobile app, for improved productivity.

Mapping

Plot records on a map – for increased efficiency and productivity of field reps.

WORKBOOKS *for Customer Service*

Workbooks CRM empowers you to deliver exceptional customer service and drive high customer satisfaction.

Customer Service CHECKLIST

- **Manage Cases,** answer customer questions quickly and effectively
- **Track activity history** with a complete view of the customer
- **Increase agent productivity** whilst reducing admin by automating repetitive tasks
- Accurately measure your **Service Level Agreements** (SLAs)
- **Service your customers** the way they want to be serviced

Ticketing & Case Management

Automatically create cases and set priorities. Assign tickets to individual users or groups (queues). Track all emails, notes and activities in one place. Synchronise with Outlook, Exchange/Office365 or Google Apps.

Identify Unhappy Customers

Categorise customers into 'Red/Amber/Green' so you know which customers are happy and which ones are 'at risk'. Utilise cases and reports to manage issues to a successful conclusion.

Measure your Service Level Agreements (SLAs)

Track performance against SLAs in real-time. Identify which cases are overdue or about to breach SLAs.

Manage Agent Workload

See open cases by agent. Easily reassign cases to different teams or users. Manage workload and resources allocation. Monitor trends by day, week, year and identify seasonal peaks.

Case Allocation

Automatically route cases based on agents' skills and knowledge, for increased speed and accuracy of resolution.

Reports & Dashboards

Maintain visibility of performance to your agents with reports & dashboards and display them on a screen to drive behaviour day-to-day. Make key customer metrics visible to management for better decision making.

Address Re-Occurring Issues

'Slice and dice' your customer service data and get insight into re-occurring problems. Use the insight to deal with the source of the issues.

Create a Knowledge Base

Record customers' common problems & solutions and create Knowledge Base cases, ensuring the information is easy to find. Build email templates to ensure communication is consistent.

Multi-Channel Support

Manage cases via an email inbox. Capture enquiries via a Web form. Allow customers to log into a Web portal and manage cases online (self-service). Capture chat logs and integrate Social Media tools like Hootsuite.