



# JumpStart PROGRAMME

A world-class CRM with free implementation



**At Workbooks we have successfully completed hundreds of CRM deployments, helping organisations increase their revenues through more effective sales and marketing activities.**

We've taken that knowledge and distilled it down into the Workbooks JumpStart Programme, a quick, easy and cost-effective way to get up and running with a CRM solution designed for mid-size businesses.

The JumpStart Programme includes several elements:

1. A set of pre-defined sales and marketing processes based on best practice.
2. A pre-configured Workbooks CRM database.
3. Free implementation services\* including data import and user training.

By using the JumpStart Programme, you can be live with CRM in a matter of weeks, helping your organisation find more sales opportunities and close more deals.

Workbooks offers two versions of the JumpStart programme which can be purchased separately or together.

<i>Key Elements</i>	<i>JumpStart for Sales</i>	<i>JumpStart for Marketing</i>
Contact and Activity Management	X	
Opportunity & Pipeline Management	X	
Sales Forecasting	X	
Account Management	X	
Outlook Integration	X	X
Azure/Office365 Integration	X	X
Email Marketing		X
1 x HTML and Plain Text Email Templates		X
1 x Website Lead Capture Form		X
1 x Email Marketing Preference Centre		X
Website Visitor Tracking in CRM		X
Data Import	X	X
On-boarding and Training	X	X

\*See terms and conditions



# CONTACT AND ACTIVITY MANAGEMENT

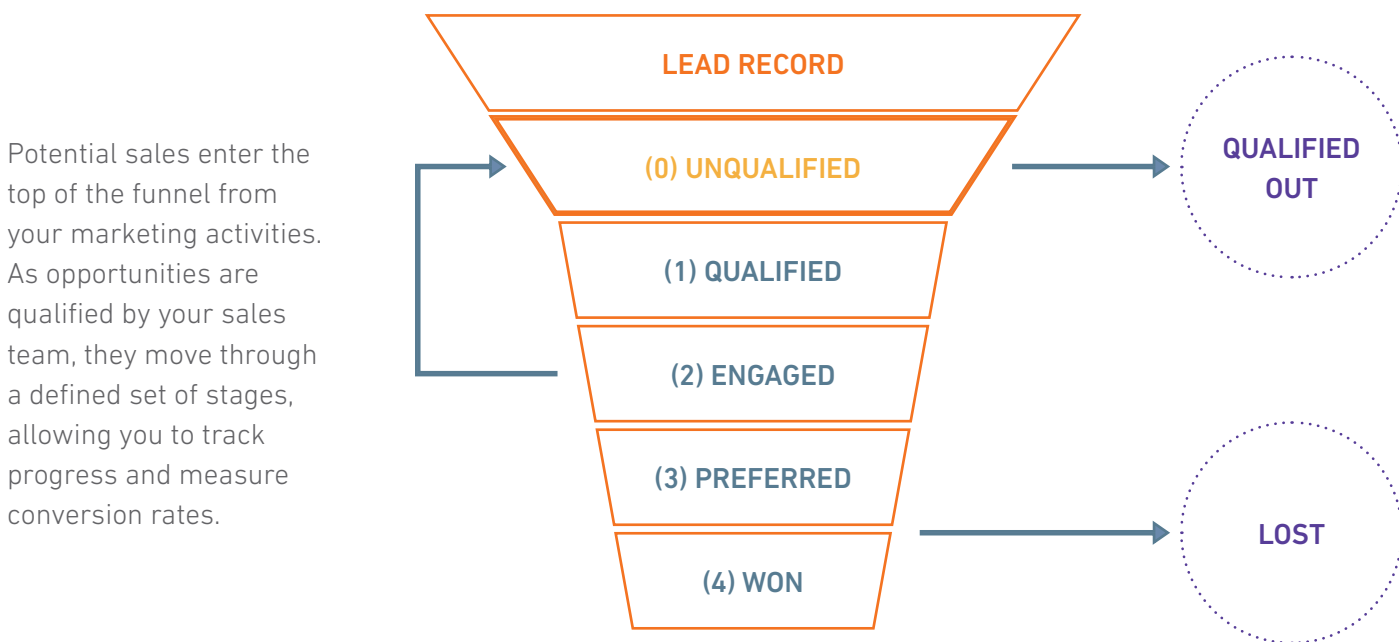
A centralised database where you can store information about the organisations and people you do business with. You can record notes, activity records (such as meetings, tasks and phone calls) and emails against all record types.

Organisations and People records can be flagged as being Prospects, Customers, Suppliers, Competitors, or any combination of these. In addition, these records already include basic profiling fields such Job Role (People), Revenues, Number of Employees, Industry and Category fields (Organisations).

The scope of the project also includes the ability to configure up to 3 additional fields on each record to store further profiling information. Profiling information can be used in reporting to segment customers and prospects.

## SALES AND MARKETING FUNNEL

At the core of the JumpStart programme is the concept of a marketing and sales funnel with defined stages that opportunities move through.



Opportunities progress through to three potential outcomes:

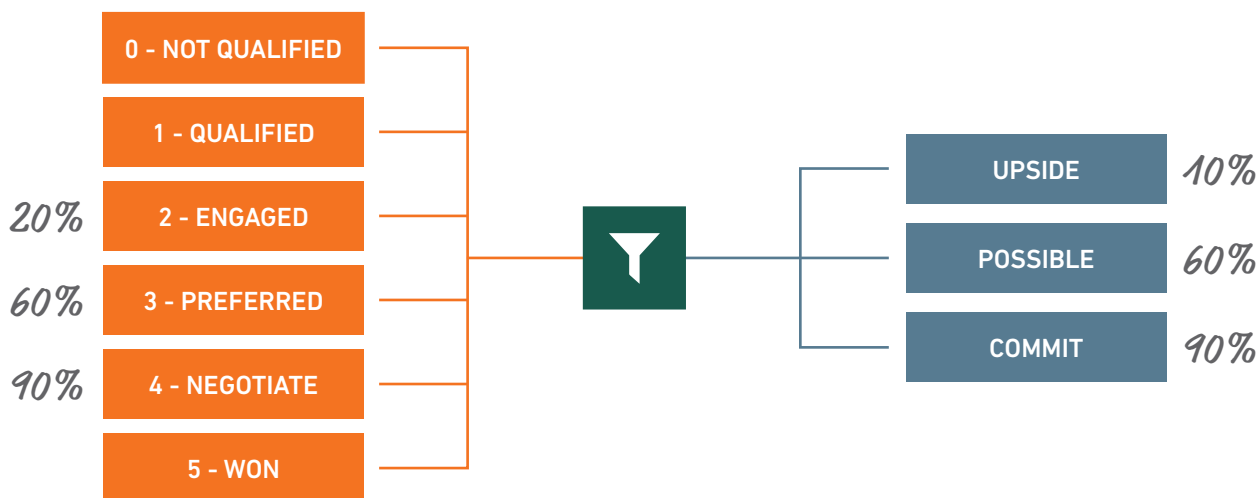
1. **Won** (the preferred outcome).
2. **Lost** – which means they spent money but not with your organisation.
3. **Qualified Out** – which means the prospect wasn't the right type or they weren't ready to buy.

The JumpStart design also requires each Opportunity record to have a 'Next Step' Activity with a due date. This ensures your salespeople are on top of their deals and that the next step in the sales process happens on time and isn't missed. By tracking the outcomes of your sales and marketing activities you can improve your processes and do more of what works for your business.



# SALES FORECASTING

Included in the JumpStart scope is the choice of two different options for sales forecasting. You can either build a weighted forecast based on sales stages with a percentage value for each stage or you can ask your salespeople to forecast individual deals.



If your salespeople manage a large number of opportunities, then a weighted forecast by sales stage may be the easiest way to build a sales forecast. However, asking salespeople to forecast individual deals will create a more accurate forecast.

# ACCOUNT MANAGEMENT

A standard element of the JumpStart for Sales process is a simple, but effective account management process. The account management process consists of three elements:

1. An Account Health value for each client, which can be set as Red, Amber or Green enabling you to record their sentiment.
2. A Customer Care process, which ensures that each client has a regular account review. The period between reviews can be defined by you.
3. An 'At Risk' process to identify which clients are unhappy and ensuring that a documented account plan is in place, so you can return them to a green status.

The pre-built Workbooks database includes a Customer Health Dashboard which allows you to keep track of your Account Management activities including:

- Customers by Account Health, so you can track the overall sentiment of your customer base.
- Customers with no Customer Care review scheduled, enabling you to spot which accounts aren't being managed correctly.
- Recently completed Customer Care activities, so you can see the most recent customer feedback.
- Open At Risk Activities, allowing you to see the action plans for unhappy customers in detail.

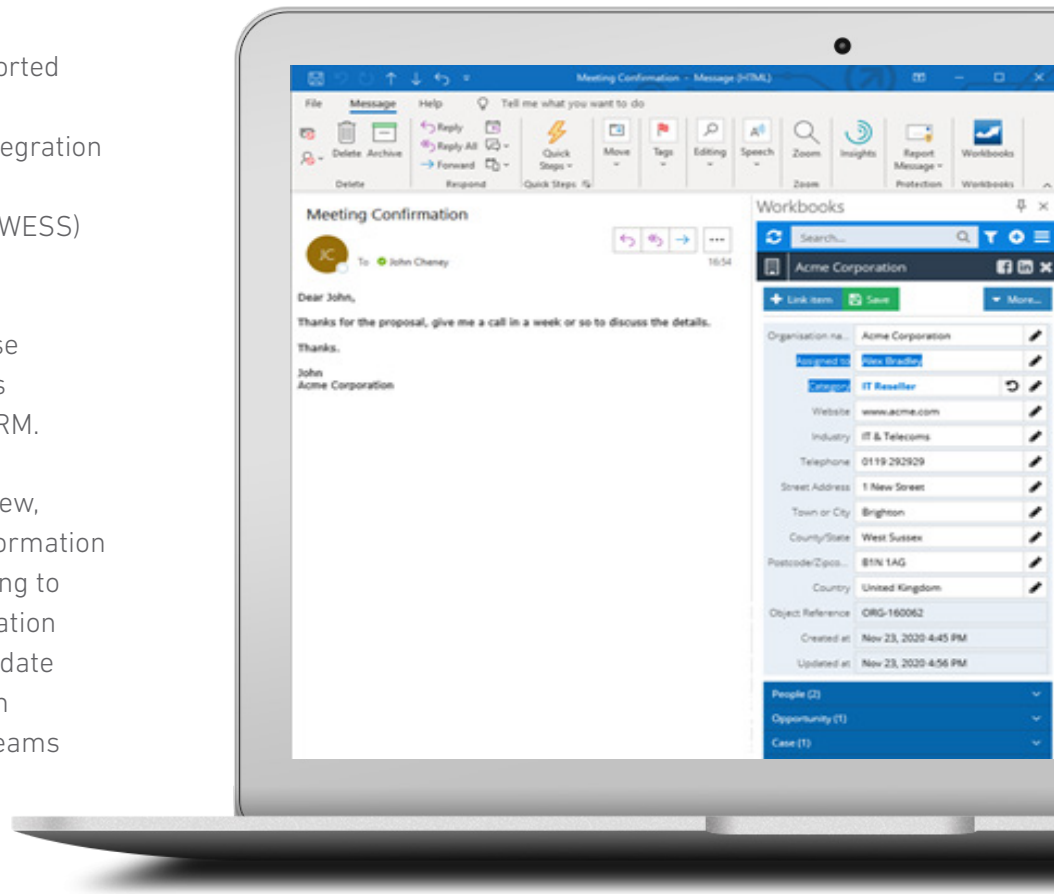


# OUTLOOK INTEGRATION

If you're using Office 365 or a supported version of Microsoft Exchange, the JumpStart deployment includes integration with Outlook, using the Workbooks Exchange Server Synchronisation (WESS) and the Outlook Add-In.

The WESS allows you to synchronise emails, contacts, meeting and tasks between Outlook and Workbooks CRM.

The Outlook Add-in allows you to view, create and update CRM records information directly inside Outlook without having to login to Workbooks. Outlook integration ensures your CRM system is up-to-date with the latest correspondence with customers and makes your sales teams more productive.



# AZURE ACTIVE DIRECTORY INTEGRATION

If you are using Office 365 or Microsoft Azure Active Directory\* you can integrate Workbooks CRM as part of the JumpStart programme. This provides several major benefits:

1. **Single Sign-on:** Meaning your users don't need to remember a separate username and password to access Workbooks. Directly from the Workbooks login page they can access Workbooks without having to login again if they are already logged into Azure Active Directory via Outlook or their PC login.
2. **User Management:** Workbooks supports the creation and deletion of Workbooks users via Azure AD groups, so if someone joins or leaves your organisation their Workbooks accounts can be automatically added or deleted from Azure without additional effort for your IT staff.

# EMAIL MARKETING

JumpStart for Marketing includes everything you need to start communicating with your customers and prospects via email and creating more sales opportunities for your teams.

Workbooks GatorMail is an advanced email marketing tool enabling you to easily send automated, targeted marketing messages via email to any mailing list no matter how complex or dynamic. With Workbooks, you get CRM and email in 1 solution, out of the box!

If you're using your own domain name, we'll help you transfer the domain onto GatorMail and provide guidance on the DNS setup.

\*Optional additional cost, Advanced Security licenses required



# WEBSITE VISITOR TRACKING INSIDE CRM

Workbooks Web Insights is a web analytics tool that identifies your website visitors and tracks and scores what they are looking at (pages viewed). And because Web Insights is part of the Workbooks suite, the online activities information is automatically recorded against Organisations, Leads and People in Workbooks CRM, giving you 'in context' actionable insights that can truly transform your sales engagement.

Web Insights allows you to 'score' your website pages, allowing you to identify which of your website visitors are most likely to be ready for a sales engagement. We will help you define a page scoring strategy which will be implemented as part of the setup.

In order to help you identify new sales opportunities quickly, the JumpStart for Marketing configuration includes reports and dashboards to identify which People, Leads and Organisations should be followed-up by the sales team.

## WEBSITE LEAD FORM

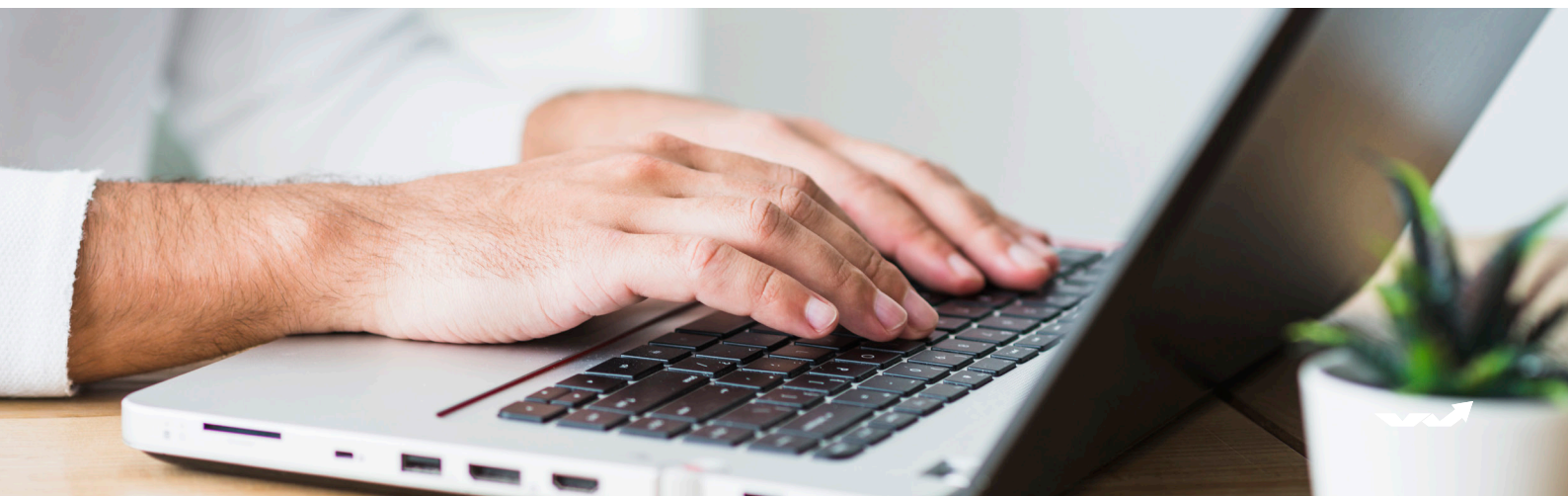
The setup of one Website Capture Form is included as part of the JumpStart for Marketing programme. Customers will be able to determine which fields are included on the form and which fields require validation, such as an email address. They can also include a reCAPTCHA to mitigate spam.

Two technologies are available for Website Capture Forms; either an embedded form, which will produce HTML that should be added to your site, or a separate landing page which can be linked to your site. We would recommend using the embedded form as it allows your web team to leverage your website CSS styling to ensure brand consistency.


The completion of a Website Form by a customer or prospect will automatically create records inside the Workbooks CRM platform. The logic applied is as follows:

- If an email address provided on the form can be matched to a Person record, an Online Activity record is created of type 'Web Form Submission' - and is connected to the Person record and the Web Insights score is increased.
- If it can't be matched then a new Lead record is created in Workbooks and the Online Activity record is connected to that Lead.

The scope of the JumpStart project includes a single Website form; however, this can be used for multiple campaigns.



# EMAIL PREFERENCE CENTRE







Workbooks.com

### Your Email Preferences for Workbooks

Tell us what you would like to hear about, and we'll make sure to personalise your experience.

Below are the categories of communications you can opt-in or opt-out of. Select the options you're interested in below and click the 'Update your preferences' button to confirm. You can change your preferences at any time.

<div></div> <div><b>Complimentary Resources</b> Gain access to reports, guides and whitepapers for valuable and in-depth tips and tricks, best practices and practical advice. <input checked="" type="checkbox"/></div>	<div></div> <div><b>Events &amp; Webinars</b> Find out about our upcoming webinars and events - for a chance to meet with our team, discuss how to drive business success and ask questions. <input checked="" type="checkbox"/></div>
<div></div> <div><b>Workbooks Blog Notifications</b> Stay up-to-date with the latest CRM / Marketing Automation tips and trends (frequency x 1 / week). <input checked="" type="checkbox"/></div>	<div></div> <div><b>Product &amp; Company News</b> Keep abreast with the latest information and be one of the first one to know about our promotional offers. <input checked="" type="checkbox"/></div>

#### Update your details

Changed your email, moved on from your last company? If you need to update your details use the form below.

First name:

Last name:

Email address:

Update Your Preferences

A GatorMail preference centre is a useful tool to reduce your email 'opt-out' rate, allowing you to reach a larger audience and improve lead flow and engagement.

The preference centre provides an alternative to a blanket 'opt-out' which allows your customers and prospects to subscribe (and unsubscribe) to the content they are interested in.

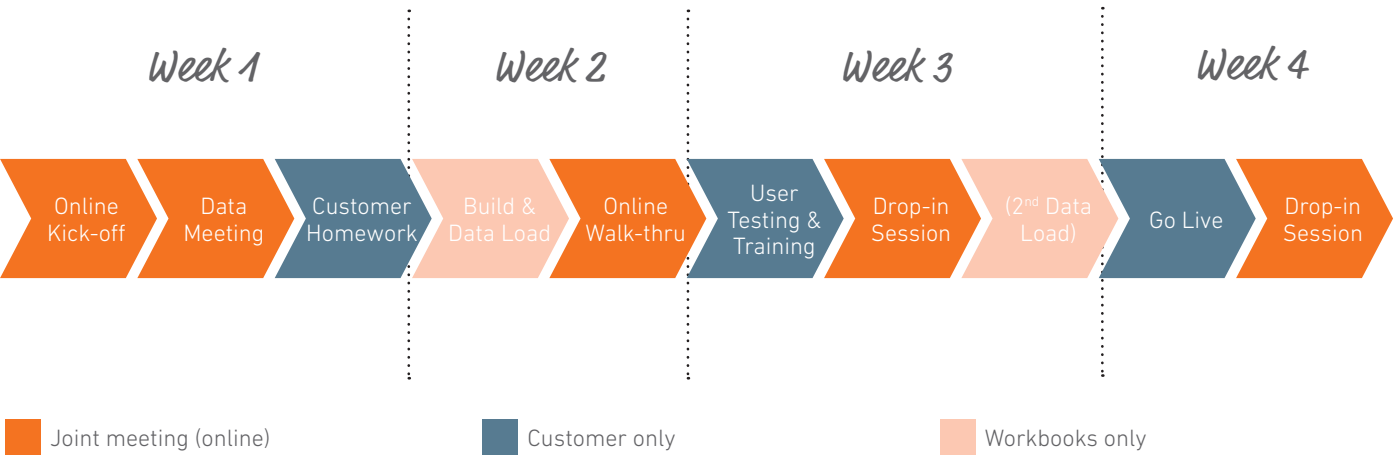
An example of a preference centre is shown to the left, providing 4 options, plus the ability to update contact details.

The 'JumpStart for Marketing' programme includes the setup of a preference centre, with up to 10 subscription options.

# ON-BOARDING AND FREE IMPLEMENTATION

If you choose the JumpStart programme you will be allocated an on-boarding manager who will help you configure your Workbooks system, import your data, and provide training and guidance. All on-boarding will be done online including user training.

On-boarding will typically take 4 weeks and will follow the structure below:



Workbooks will provide a day of system administration training, which will cover basic Workbooks configuration tasks, such as changing pick list values, screen layouts and basic reporting skills.

The implementation costs are:

- JumpStart for Sales - £4,800
- JumpStart for Marketing £4,800
- JumpStart System Administration Training- £960

If you commit to a multi-year agreement, Workbooks will provide an allowance against your implementation costs of up to 50% of your annual licence fee for a 2-year contract to 100% for a 3-year contract.

To illustrate how things would work: If you wanted a JumpStart for Sales deployment for 15 people you would likely purchase:

- 15 x Workbooks CRM Licences - £3,960 per annum
- 15 x Workbooks Exchange Server Synchronisation Licences - £990 per annum
- 15 x Workbooks Audit Licences - £900 per annum

Therefore, your total annual licence fee would be £5,850. The table below illustrates the implementation allowance you would receive based on a 1, 2 or 3 year agreement.

<i>Contract Length</i>	<i>Annual Licence Costs</i>	<i>Implementation Costs</i>	<i>Implementation Allowance</i>	<i>Actual Implementation Cost</i>
1 Year	£5,850	£5,760	£0	£5,760
2 Years	£5,850	£5,760	£2,925 (50% of licence fee)	£2,835
3 Years	£5,850	£5,760	£5,850 (100% of licence fee)	£0

