

Drive business success

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 organisations to efficiently acquire, convert and retain customers.

It has a powerful reporting tool that helps organisations 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 FULFILMENT

- 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 organisations 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 licence 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
★★★★★
4.4 out of 5 (103 reviews)

TrustRadius
TOP RATED 2020
★★★★★
4.3 out of 5 (28 reviews)

Capterra
★★★★★
4.4 out of 5 (101 reviews)

G2
HIGH PERFORMER SUMMER 2021
★★★★★
4.3 out of 5 (478 reviews)



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



Source: Independent G2 Crowd Summer 2020 Report

..... JOIN A GROWING COMMUNITY OF USERS

..... OVER 1400 ORGANISATIONS TODAY RUN THEIR BUSINESS ON WORKBOOKS