



Workbooks

Pricing

CRM EDITIONS

CRM			BUSINESS		EVENTS	
	Core	Professional	Core	Professional	Core	Professional
Price per user per month	\$39	\$54	\$78	\$95	\$167	\$182
	\$468 per user per year	\$648 per user per year	\$936 per user per year	\$1140 per user per year	\$2004 per user per year	\$2184 per user per year
CORE FUNCTIONALITY			Different editions may be purchased for different users*			
Account & Contact Management	✓	✓	✓	✓	✓	✓
Sales Management & Automation	✓	✓	✓	✓	✓	✓
Marketing Management	✓	✓	✓	✓	✓	✓
Customer Service Management	✓	✓	✓	✓	✓	✓
Order Processing	✗	✗	✓	✓	✓	✓
Invoicing & Credit Notes	✗	✗	✓	✓	✓	✓
Automation Engine & Workflows	✓	✓	✓	✓	✓	✓
Customizable Layouts	✓	✓	✓	✓	✓	✓
Security	✓	✓	✓	✓	✓	✓
Data Management	✓	✓	✓	✓	✓	✓
Reporting & Dashboards	✓	✓	✓	✓	✓	✓
Mobile	✓	✓	✓	✓	✓	✓
Sandbox & Testing	✓	✓	✓	✓	✓	✓
Events Management	✗	✗	✗	✗	✓	✓
SUPPORT						
Email, Forum & Phone	✓	✓	✓	✓	✓	✓
EXTENSIONS			Must be purchased for all users. Billed annually per user			
Multi Organization	\$92	✓	\$92	✓	\$92	✓
Multi Currency	\$92	✓	\$92	✓	\$92	✓
Multi Language	\$92	✓	\$92	✓	\$92	✓
Advanced Security	\$92	✓	\$92	✓	\$92	✓
Audit Trail	\$92	✓	\$92	✓	\$92	✓
Custom Records	\$92	✓	\$92	✓	\$92	✓
MODULES			Can be purchased for users who need them. Billed annually per user			
Contract Management	\$92	✓	\$92	✓	\$92	✓
Exchange Integration	\$106	\$106	\$106	\$106	\$106	\$106
Mapping	\$106	\$106	\$106	\$106	\$106	\$106
ADDITIONAL STORAGE						
100 GB included as standard						
5 GB increments				\$216 per 5 GB per year (\$18 per 5GB per month)		

Workbooks is purchased on a 1, 2, or 3-year subscription and is billed annually.

*You can mix CRM, Business and Events. However, you can't mix CRM, Business and Events Core Editions with Professional Editions.



MARKETING AUTOMATION

WORKBOOKS WEB INSIGHTS

Workbooks Web Insights is billed annually based on the number of pages viewed on your website per month.

PAGE VIEWS PER YEAR	PER MONTH	ANNUAL	MONTHLY
50,000	4,167	\$2,184	\$182
100,000	8,333	\$3,180	\$265
200,000	16,667	\$5,220	\$435
400,000	33,333	\$9,348	\$779
600,000	50,000	\$11,556	\$963
800,000	66,667	\$12,660	\$1,055
1,000,000	83,333	\$13,632	\$1,136
2,000,000	166,667	\$18,816	\$1,568
4,000,000	333,333	\$29,472	\$2,456
6,000,000	500,000	\$38,880	\$3,240
8,000,000	666,667	\$47,292	\$3,941
10,000,000	833,333	\$54,720	\$4,560

WORKBOOKS GATORMAIL

GatorMail licences are sold on an annual basis. If you exceed your annual allowance, you can upgrade to the next tier.

SENDS PER YEAR	PER MONTH	ANNUAL	MONTHLY
30,000	2,500	\$864	\$72
60,000	5,000	\$1,656	\$138
150,000	12,500	\$3,960	\$330
300,000	25,000	\$4,560	\$380
500,000	41,667	\$5,220	\$435
1,000,000	83,333	\$7,368	\$614
2,000,000	166,667	\$8,412	\$701
3,000,000	250,000	\$10,524	\$877
6,000,000	500,000	\$16,188	\$1,349
10,000,000	833,333	\$26,280	\$2,190
15,000,000	1,250,000	\$33,660	\$2,805
20,000,000	1,666,667	\$39,936	\$3,328
40,000,000	3,333,333	\$49,500	\$4,125



MARKETING AUTOMATION

WORKBOOKS WEB INSIGHTS

ADD-ONS	PRICE
Popups	Included as standard
Additional Web Insights Domain	\$180

WORKBOOKS GATORMAIL

ADD-ONS	PRICE
Advanced Email Workflow	20 active workflows included as standard
Advanced Inbox Checker	Included as standard
Survey Tool	Included as standard
Additional GatorMail Domain	\$180

WORKBOOKS GATORSOCIAL+

Easily manage and publish content across all your social media channels

ANNUAL	MONTHLY
\$4,620	\$385

SALES AUTOMATION

WORKBOOKS CPQ

Simplify and automate complex quotation processes, and help sales teams build quotations quickly and accurately

ANNUAL	MONTHLY
\$600	\$50

TIBCO CLOUD INTEGRATION

Migration and integration services from and to cloud-based and on-premise applications

ANNUAL	MONTHLY
\$5,940	\$495



DATA QUALITY

DATA QUALITY FOUNDATION

Includes deduplication and merge functionality, but without automation for continuous data cleaning

RECORDS PER YEAR	ANNUAL	MONTHLY
50,000	\$1,780	\$150
75,000	\$2,430	\$200
100,000	\$3,240	\$270
150,000	\$4,700	\$390
200,000	\$6,080	\$510
300,000	\$8,670	\$720
400,000	\$11,020	\$920
500,000	\$13,040	\$1,090
750,000	\$19,120	\$1,590
1,000,000	\$23,980	\$2,000
1,250,000	\$29,000	\$2,420
1,500,000	\$32,400	\$2,700

DATA QUALITY MASTER

Includes Foundation deduplication and merge functionality, as well as automation for continuous data cleaning

RECORDS PER YEAR	ANNUAL	MONTHLY
50,000	\$3,080	\$260
75,000	\$4,240	\$350
100,000	\$5,670	\$470
150,000	\$8,260	\$690
200,000	\$10,630	\$890
300,000	\$15,070	\$1,260
400,000	\$19,360	\$1,610
500,000	\$22,920	\$1,910
750,000	\$33,530	\$2,795
1,000,000	\$42,040	\$3,500
1,250,000	\$50,790	\$4,230
1,500,000	\$56,700	\$4,730



SERVICES

IMPLEMENTATION

We offer two implementation approaches to suit your needs:

JumpStart lets you get started quickly with pre-built solutions

JumpStart

PACKAGE	PRICE
JumpStart for Marketing	\$7,500
JumpStart for Sales	\$9,000
JumpStart for Customer Service	\$9,000

Shared Success offers a co-funded workshop to define business outcomes together with free implementation services

Shared Success

DAYS	PRICE
6-day program*	\$4,500 plus expenses
8-day program**	\$6,000 plus expenses

* 2 days on-site for 2 consultants, plus 2 days to define the CRM roadmap and budget, document and present findings

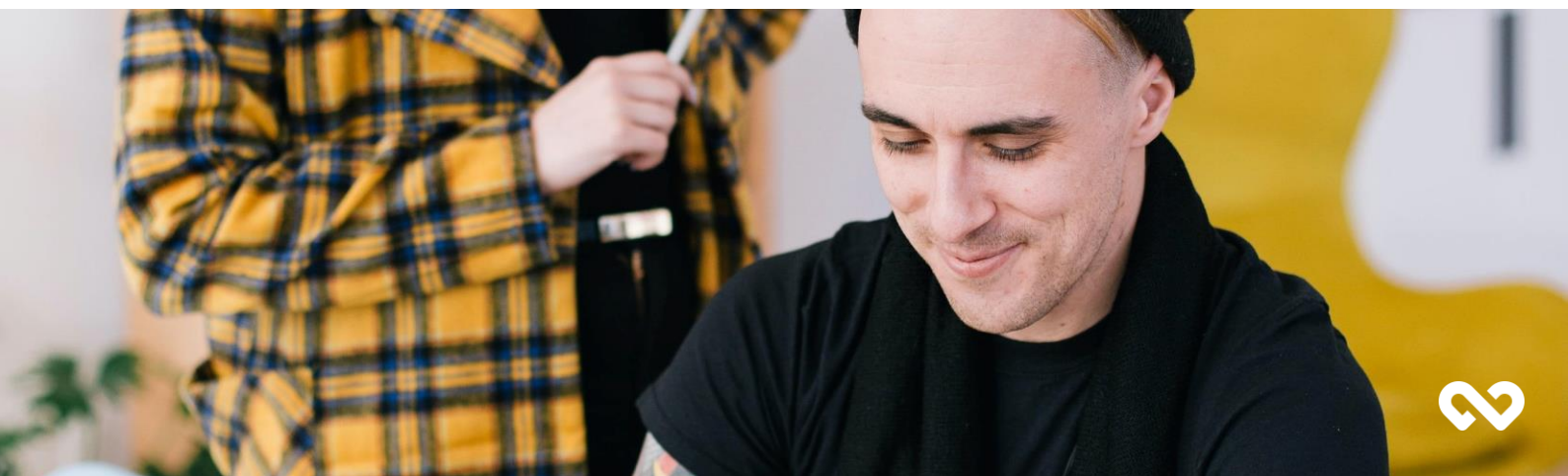
** 3 days on-site for 2 consultants, plus 2 days to define the CRM roadmap and budget, document and present findings

Free Implementation

DAYS	PRICE
Up to 20 days' free implementation services*	1 free day per \$3,000 of annual license value**

* plus expenses for any work carried out on-site

** subject to minimum \$20K annual license value, Shared Success workshop completion and minimum 3-year contract



SERVICES

TRAINING

Courses Available

NAME	PRICE PER ATTENDEE
System Administrator Training Course (2 days)	\$1,400 plus expenses
Reporting Training Course (2 days)	\$1,400 plus expenses
Developer Training Course (2 days)	\$1,400 plus expenses
Marketing Training Course (2 days)	\$1,400 plus expenses
Training Pass for Two Courses	\$2,000 plus expenses

PROFESSIONAL SERVICES

Consultancy Days

DAYS	PRICE
1-day consultancy	\$1,500 plus expenses

Advisory Packs

POINTS	PRICE
8 points (0.5 days)	\$900 plus expenses
16 (1 day)	\$1,600 plus expenses
32 (2 days)	\$3,200 plus expenses
48 (3 days)	\$4,800 plus expenses
64 (4 days)	\$6,400 plus expenses
80 (5 days)	\$8,000 plus expenses



SERVICES

PROFESSIONAL SERVICES

Customer Success Plus packages are subscription services that renew alongside licensing

CUSTOMER SUCCESS PLUS	BRONZE	SILVER	GOLD
Total Package Cost	\$10,600	\$20,200	\$27,700
Package day rate*	\$1,350	\$1,245	\$1,140
Customer Success Manager	✓	✓	✓
Consultancy days included per year	8 days	16 days	24 days
Additional consultancy day rate* (purchase as needed in the year at this discounted rate)	\$1,350	\$1,245	\$1,140
Regular Shared Success review meetings with your CSM	Half-yearly	Three per year	Quarterly
Strategic Business Review Workshop*	\$1,190	Annually	Annually

* plus expenses for any work carried out on-site

PACKAGED SERVICES	PRICE
GDPR	Price on request
Workbooks Helping Hands (2 days)	\$3,300
GoToWebinar Integration (2 days)	\$3,300
On24 Integration (2 days)	\$3,300
Reporting Workshop (1.5 days)	\$2,480
Adobe Sign Integration (1 day)	\$1,500
Xero Integration with Zapier (1 day)	\$1,500

To find out more contact us on
+1 860-438-6647 | success-usa@workbooks.com

