Workbooks
vs
monday.com

A well-developed CRM vs a CRM in infancy stage

monday.com was built as a project management tool for project managers. The CRM aspect is in its infancy - meaning functionality being bolted onto an existing platform.

Early adopter customers report a lot of bugs, an unreliable mobile app, and a lack of features like custom reporting templates.

Workbooks was built as a CRM tool which means it is much more customizable, reliable and fit for purpose. It also has project management functionality built-in, so you get the best of both worlds.

G2 review on Monday.com

"It was simple to use but not that impressive overall. We need something much better to track sales and run campaigns."

https://www.g2.com/products/monday-com/reviews/monday-work-management-review-10845778

TechRadar thinks

Workbooks is ranked Best CRM for midsize businesses & #2 overall for CRM.

Monday.com is ranked #5 overall for CRM with a strong focus on its core – project management.

Read more from TechRadar here

monday.com has no phone support

A point of contention for Monday.com's customers is the lack of phone support.

By requiring customers to email in, response times and general communications are considerably slower. This is frustrating in situations where you need immediate support.

Workbooks is a UK and US based company with phone, email and service desk support.

They pride themselves on quick responses and a 10-year customer retention average.

Workbooks

Designed for different people

Workbooks is designed to help sales, marketing, operations, and customer services. This means they offer all the functionality these roles need to effectively manage customers, sales, invoices, projects and more.

Monday.com is designed for project managers and was never originally intended to be used by sales teams as a CRM. Because of this, there are big differences in terms of sales features, functionality, and benefits.

Monday.com offers basic features with the goal of using a CRM as a place to store contact data and sales processes.

Automation

Monday.com's automation has a reputation for being basic and unreliable – requiring lots of work arounds.

Workbooks offers marketing automation with segmentation, personalized microsites, tracking, web tracking, automated email workflows that extend beyond just basic email trails, and more.

Scalability

Monday.com might seem appealing due to low costs and basic functionality, but as your business expands businesses tend to quickly outgrow the platform.

This means if you want to stay with Monday.com, you'll need extensive customization and multiple integrations – where costs can add up significantly over time.

Many companies find themselves using Monday.com as a project management tool and investing in new CRM software as they grow – this can be expensive and overly complex.

Workbooks offers affordable implementation plans that give you out-of-the-box functionality.

As your business grows, you can customise the platform in a way that works for you. Workbooks include as much functionality as possible within your package to minimize the need for a high number of integrations.

They also have project management built-in to the product, so you'll never need to invest in separate systems as your business grows.

G2 review on Monday.com

My biggest hurdle has been reporting. Being able to generate reports for tracking at a micro-level is difficult. Not all reporting views allow for the level of drilling down that I have come to expect for things like time-tracking or grouping.

Custom reporting templates

One of the biggest areas of complaint around Monday.com is advanced reporting. If you want to download reports or send them via email it can get expensive as you'll need to find add-ons in the marketplace. It can be tough to sort and filter data to get the best views.

With Workbooks you can build a personalized suite of reports, take snapshots to stay on top of trends, automate tasks based on reporting data like activity reminders, and easily filter and share reports with your team.

Tempted by the free version? Think again…

You get very limited functionality included with the free version with no more than 200 rows in spreadsheets.

Users complain that it takes a long time to set up their data within the free version for them to realise there are too many limitations to actually use it.