



# CRM

*for IT Businesses*



**As an information technology provider, you might have a CRM solution or several disparate systems in place already, but is it good enough?**

- Is your solution working for you as hard as it should?
- Does it enable you to manage your entire customer life cycle?
- Does it enable you to manage the entire business process for your clients?
- Can you deliver a unified customer experience end-to-end?



**E-sign of Documents**



**Field Service Management**



**Support Portal for Customers & Partners**



**Professional Service Fulfilment Tracking**

Workbooks has been developed with the needs of IT providers in mind, whether you're a software vendor, a value-added reseller (VAR) or a distributor. Workbooks is more than CRM – it is a unified platform to manage your clients' journey end-to-end: from marketing to sales, order and contract processing, billing, service and support/help desk – and all this at a fraction of the cost of Salesforce or Dynamics.

The benefits are plenty. You get a much better understanding of your clients, and with end to end visibility you make better decisions. Disparate systems and data silos become a thing of the past. Your customers gain a richer and better unified customer experience, which drives retention and increased lifetime value.

If your solution is only helping you drive sales, you are certainly missing a trick! Workbooks CRM could help you deliver:

- Increased Revenue Growth
- Improved Customer Experience
- Reduced Operational Costs
- Improved Decision Making





# OPTIMISE

## *Sales and Marketing*

## MARKETING AND SALES AUTOMATION

**Workbooks gives you a single 360-degree view of your target market, providing a clear picture of who the key segments are, what they want, and when and how they want it.**

Workbooks gives you the tools to do business more efficiently and effectively, helping you to develop a truly data-driven sales and marketing strategy. It gives you the power to analyse sales performance by rep, by channel, or industry sector, and track and sort activities by product, vendor or VAR.

You can track the progress of leads and understand where your business is performing well and where focus is needed. Workbooks can help ensure leads are being passed seamlessly from marketing to sales - or shared with partners at the right moment. Lead scoring can easily be implemented, and nurture campaign workflows can be created to deliver content to the right audience at the right time. Your marketers can also use Workbooks web analytics to gain valuable insights on prospects' behaviour on your website - and then tailor messages accordingly.

Workbooks makes it easy to segment data to send personalised emails and connect with prospects at all stages of the sales cycle.





Your marketing team will be able to gauge the success of their campaigns quickly and easily, by viewing response rates, tracking KPIs, open and click-through rates for emails, and by monitoring the status of leads and sales opportunities associated with a campaign - all in one platform. They will be able to track those opportunities all the way to closure.

Many of the manual process of planning, organizing and promoting events and training courses can be automated in Workbooks freeing your team for other important strategic activities. They will be able to build customized forms for capturing attendee details, automate the registration process, and schedule relevant communication to increase overall attendee experience whilst gathering meaningful data to measure event success and ROI.

All of this will give you a clearer view on the return you're getting for your marketing investment, helping to inform your future spending plans, both within your marketing team and with partners and vendors.

Workbooks pulls in information from across the business and presents it back to salespeople and marketers in easy-to-understand, real-time dashboards and reports, offering a clear view of the pipeline and making it easy to collaborate and allocate tasks between departments.

Every interaction, activity, engagement is recorded and visible throughout the sales cycle and for both teams to see.

With no data silos, information in Workbooks can be ring fenced, allowing you to precisely control which users can access specific data based on security rules. For example, the US sales team can see US opportunities, but not international opportunities.

Workbooks can also help drive strong sales and marketing alignment and ensure you get the most out of your sales and marketing teams, making your organization more customer-centric, and ultimately higher performing and more successful.







## EXTENDED TO A FULL LEAD-TO-CASH SOLUTION

**But that's not all. In addition to helping with marketing and sales force automation, Workbooks provides insights that enables your sales teams to determine quickly the right solution for customers and then the tools to be able to efficiently complete the sales process.**

From within the CRM, sales can easily produce quotes, process and track the status of orders, and track invoices and payments, giving them a view of the entire lead-to-cash process. No more data gathering from different systems, data mismatched, re-entering of data – all the tools and insights are available from within one platform.

Visibility of your customers warranties, service contracts and subscription status are crucial to business success. Inconsistent information can potentially damage your reputation, jeopardize customer loyalty and harm revenue. Workbooks provides organizations with the solution they need to ensure vital contract data is accurate. Sales & Marketing teams can easily look up existing and expired agreements to send out upsell and contract renewals. Customer services agents can instantly recognize if the service level is Gold, Silver or Bronze and stop revenue leakage.



# DRIVE

## *Customer Success*

## ACCOUNTABILITY, REPORTING AND TRACEABILITY ACROSS RELATIONSHIPS

**A deeper understanding of customers is key to success.**

Whether you're a VAR or a vendor, keeping track of your relationships with end users is vital. You need a crystal-clear picture of the complex connections between people and organizations, sales orders, trial licenses and license renewals.

Workbooks gives you that picture. It makes it straightforward to segment end users – for example by the products they currently buy, or by VAR – and identify who has stopped buying or is buying less than they used to. This gives you a clear and instant understanding of your share of wallet with each customer.





# MAKE THE MOST OF YOUR CROSS SELL/UP-SELL OPPORTUNITIES

**Workbooks makes your account management more efficient and effective, making it easier to spot cross-sell and up-sell opportunities.**

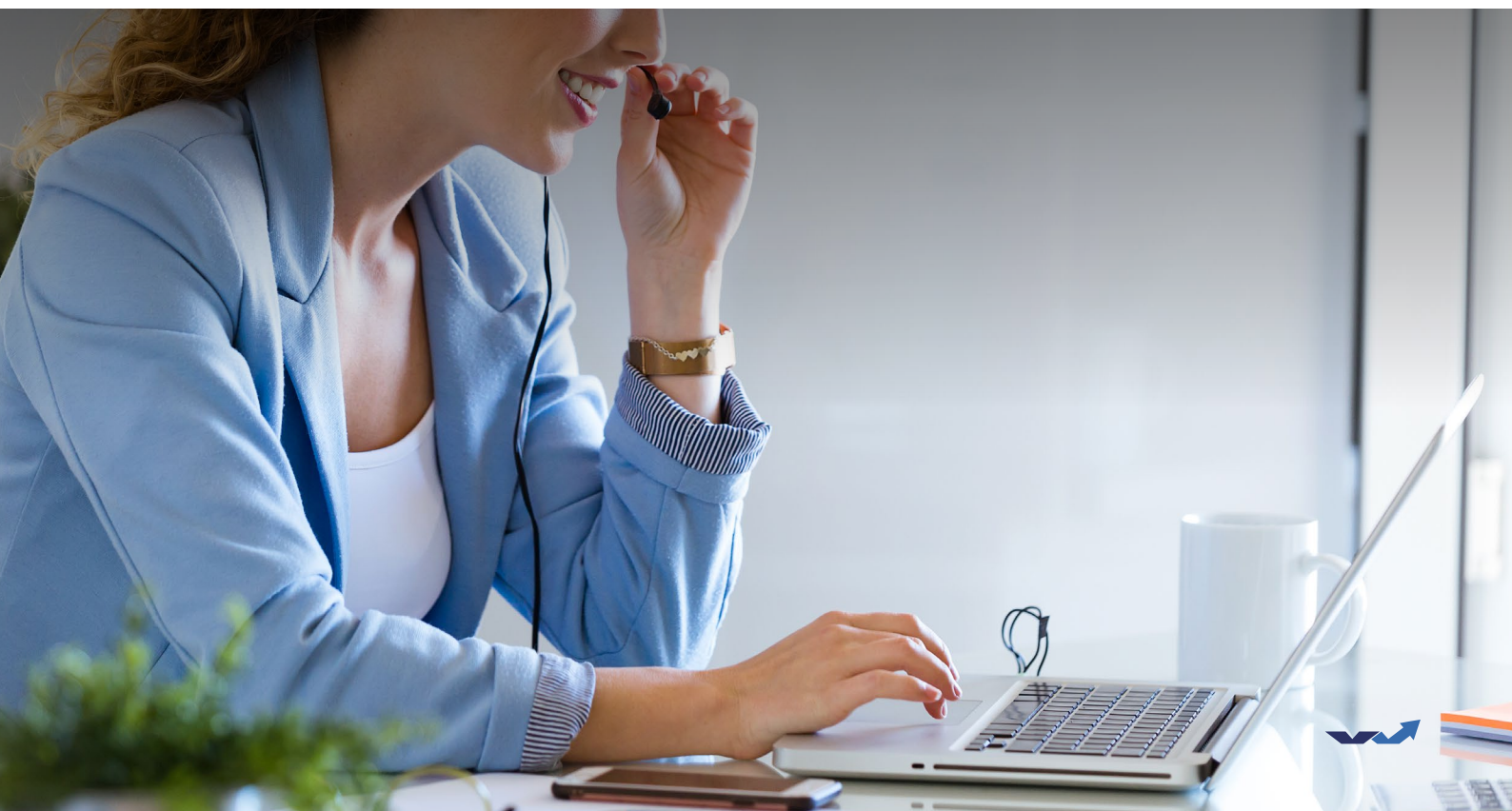
You can easily create a RAG (Red Amber Green) process that helps you identify at a glance the health of any customer. These insights drive better decision-making and help you define your customer success strategy.

Workbooks helps you better understand which customers have stopped buying from you, where the cross-sell and up-sell opportunities lie and drive the appropriate campaigns efficiently and effectively.

# DELIVER OPTIMAL CUSTOMER SERVICE

**Workbooks transforms your customer service capabilities, enabling you to automate many processes and offer self-service for your customers and partners. Your understanding of the technical and vendor-related issues that your customers face is greatly enhanced.**

You are able to build up a knowledge base containing invaluable information for agents seeking solutions to customer issues. Workbooks also delivers a greater sense of case ownership, reducing the need for customers to explain their issues multiple times and increasing the chances of a swift and accurate resolution - ultimately impacting customer satisfaction and driving increased retention.



# OPERATIONAL *Efficiency*

## SIMPLICITY AND INTEROPERABILITY AS STANDARD

**Workbooks gives access to your data across all departments, whether it relates to your customers, prospects, vendors, resellers or distributors.**

Information is available in real-time, to aid decision-making and collaboration and drive the best possible customer experience. Extensive reporting capabilities gives you easy visibility into the status of the client's service, performance, and exposes issues.

Automating processes improves productivity and efficiency. For example, it's easy to automate a trial process to create a follow-up nurture flow, progressing smoothly from trial to sale and trial licence expiry. You can also create processes that allow discounts to ensure the sales cycle is not slowed down.

Greater efficiency means less time spent on admin and menial jobs and more on building relationships, managing channels, and deciding strategy.

Workbooks will also handle your order management, commissions and discount management, document generation (including quotes, contracts and invoices etc.) and after-sales service, reducing operational overheads and the risk of human error.

Our integration strategy and capability coupled with our recently enhanced reporting enables you to show the status of your client service with a click of a button. Workbooks easily integrate with other business applications, making sure that no data is overlooked, and processes are seamlessly crossing applications boundaries.







# A BUSINESS

## *Fit for the Future*

**Part of a leader's key focus must be beyond the here and now, with longer-term strategies, considering how to secure the future of your business.**

CRM can feed into this strategic planning and support its execution. It can also help you define where this strategic direction should be, based on historical data.

There are two fundamental ways to achieve the growth that all businesses depend on: increasing revenues and reducing costs. To influence either of these key measures, you need clear visibility of what's happening in your business – and that's where Workbooks CRM comes in.

## WHY WORKBOOKS?

### **Designed for the mid-market**

Our CRM solution provides many of the features required by small and mid-sized IT organizations 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 license 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. Our expertise in the IT industry will ensure you get the right value quickly.

