Workbooks.com

Shared Success
PROGRAM

SHARED SUCCESS

At Workbooks we have successfully completed hundreds of CRM projects, helping our clients turn their investment in CRM into real business outcomes. Using our experience, we have developed a unique approach to implementing CRM. Depending on your requirements you can choose between a JumpStart implementation or a more tailored approach via our Shared Success implementation program.

With the Shared Success program we invest alongside your organization to ensure your project delivers the outcomes you expect. At the heart of the program there are two elements:

- A Shared Success workshop which we run at your offices and will jointly fund
- Free implementation services to get you onto the platform quickly and cost effectively

At Workbooks we believe that, if we invest alongside you in the early days of a project, you will see the value our people and platform provide and become a successful long-term customer. So rather than invest in several expensive sales people trying to "sell" you the value, we will invest resources to actually deliver something of value to you.
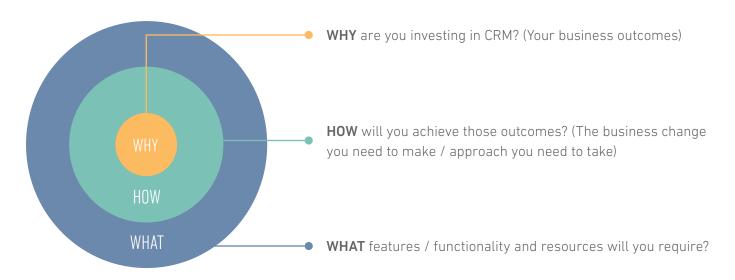
SHARED SUCCESS WORKSHOP

The first step in the process is to run a Shared Success workshop. This will take place at your offices and will require the involvement of executive sponsors and operational stakeholders. The objective of the workshop is to 'define what success looks like' for your organization.

It is all about defining and validating the WHY, HOW & the WHAT:

WHY are you investing in CRM? (Your business outcomes)

HOW will you achieve those outcomes? (The business change you need to make / approach you need to take)

WHAT features / functionality and resources will you require?

Many organizations focus heavily on the WHAT, spending hours working on feature requirements and speaking to CRM vendors to understand their product capabilities. Whilst features are important, what is arguably more important is to understand WHY your organization should be investing in CRM and HOW those outcomes are going to be achieved.

The workshop will take two days and will be run by two Workbooks consultants, who will lead your team through a process of defining success criteria and a roadmap for the CRM deployment.
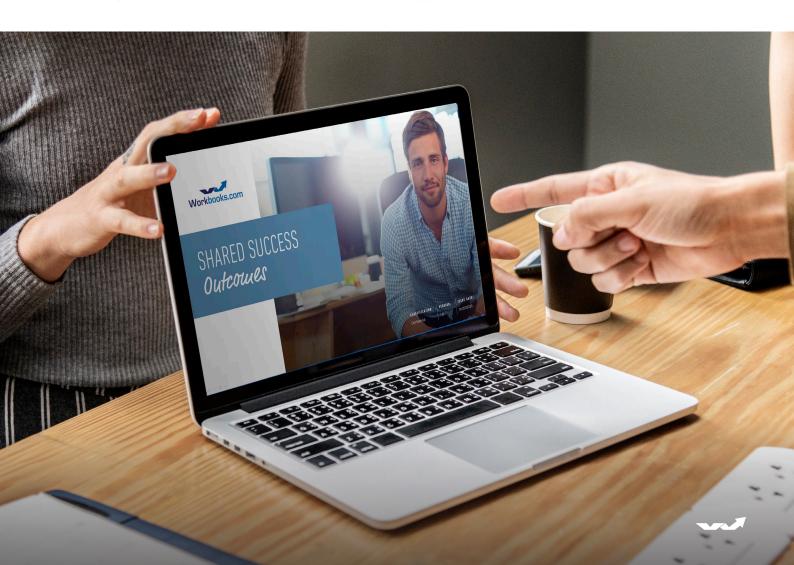
Outputs from the workshop will be:

- Business outcomes & values (WHY & HOW)
- CRM requirements (WHAT)
- CRM project roadmap
- Resource requirements and proposed budget

These outputs will be presented back to your project team (presentation and document). Workbooks will deliver six days of consultancy as part of the workshop:

- 2 days on-site for 2 consultants (4 man days);
- 2 days to define the CRM roadmap, budget, documentation of findings and a presentation back to you, the client.

As part of our strategy to invest with you, Workbooks will co-fund the workshop, charging 50% of our normal consultancy rate (our standard daily rate is $1,400). Therefore the investment for the program will only be $4,200 (6 days) + Sales Tax and expenses.

With the output from the workshop your organization will clearly understand the business benefits of CRM and the level of investment required. At this point you can either move ahead with Workbooks CRM and benefit from our free implementation service, or use the documents to approach other CRM vendors.

FREE IMPLEMENTATION

We recognize that one of the barriers that organizations face when investing in CRM, is the initial investment of time and money during the implementation phase. If you have completed a Shared Success workshop and we have a shared vision of success for your organization, we will match your investment in Workbooks licences with free consulting days.

Therefore, if the annual value of your Workbooks license is for example $20k, we will provide 10 free consulting days to help get on the platform. There are some special terms:

- Your license value must be more than $20k per annum

- You must have completed the Shared Success workshop

- You need to commit to a three year agreement

- The number of free days is capped at 20

- You must use all your free days in the first 12 months of the agreement

- If you need additional days to support your implementation, they will be charged at our standard rate: full day ($1,400 + expenses), half-day ($825 + expenses).