

# WORKBOOKS

## Pricing

### WORKBOOKS CRM EDITIONS

#### Annual pricing per user

	CRM £252 £21 per user per month	CRM Pro £396 £33 per user per month	Business £552 £46 per user per month	Business Pro £672 £56 per user per month
<b>CORE FUNCTIONALITY</b> 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	✓	✓	✓	✓
Customisable Layouts	✓	✓	✓	✓
Security	✓	✓	✓	✓
Data Management	✓	✓	✓	✓
Reporting & Dashboards	✓	✓	✓	✓
Mobile	✓	✓	✓	✓
Sandbox & Testing	✓	✓	✓	✓
Events Management	✗	✗	£*	£*
<b>SUPPORT OPTIONS</b>				
Workbooks Forum Support	✓	✓	✓	✓
Workbooks Phone/Email Support	✓	✓	✓	✓
<b>EXTENSIONS</b> Extensions must be purchased for all users. Billed annually per user.				
Multi Company Extension	£54	✓	£54	✓
Multi Currency Extension	£54	✓	£54	✓
Advanced Security Extension	£54	✓	£54	✓
Multi Language Extension	£54	✓	£54	✓
Audit Extension	£54	✓	£54	✓
Custom Records	£54	✓	£54	✓
<b>MODULES</b> Modules can be purchased for users who need them. Billed annually per user.				
Contract Management Module	£54	✓	£54	✓
Workbooks Exchange Server Sync	£60	£60	£60	£60
Workbooks Outlook Connector	£60	£60	£60	£60
Mapping Module	£60	£60	£60	£60
<b>ADDITIONAL STORAGE</b> 10 GB included as standard.				
Additional Storage (in 5 GB increments)	£120 per 5 GB per annum (£10 per 5GB per month).			

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

\*It is possible to mix CRM with Business. However, it is not possible to mix 'Core Editions' (Workbooks CRM and Workbooks Business) with 'Pro Editions'.

£\*: Events Management: for the Business Edition the total licence cost is £1,200 per user per annum (£100 per user per month) and for the Business Pro Edition it is £1,320 per user per annum (£110 per user per month). These licences are only needed for the users who require access to the Events Management functionality.



*JumpStart*

## GET STARTED QUICKLY WITH PRE-BUILT SOLUTIONS

JumpStart for Marketing	£5,370
JumpStart for Sales	£6,265
JumpStart for Customer Service	£6,265
CRM Success for Accounting	£8,055

*Shared Success*

## WORKSHOP AND FREE IMPLEMENTATION

Co-funded workshop to define business outcomes	£2,685
Up to 20 days of free implementation services	£1,000 of licence annual revenue = 1 free day*

\* 3-year contract required, subject to minimum £10k p.a licence investment

## TRAINING

*Courses Available*

## GET THE MOST FROM YOUR WORKBOOKS IMPLEMENTATION

System Administrator Training Course (2 days)	£895 per attendee
Reporting Training Course (2 days)	£895 per attendee
Developer Training Course (2 days)	£895 per attendee



### Consultancy Days

#### CONSULTANCY DAYS TO ENSURE YOUR CRM PROJECT IS A SUCCESS

½ day consultancy	£550 + expenses
1-day consultancy	£895 + expenses

### Advisory Packs

#### HELP WITH AD-HOC SMALL PROJECTS OR ENHANCEMENTS

8 points (0.5 days)	£550 + expenses
16 (1 day)	£950 + expenses
32 (2 days)	£1,900 + expenses
48 (3 days)	£2,850 + expenses
64 (4 days)	£3,800 + expenses
80 (5 days)	£4,750 + expenses

### Customer Success Plus

	BRONZE	SILVER	GOLD
Customer Success Manager	✓	✓	✓
Consultancy days (inclusive per annum)	8 days	16 days	24 days
Package day rate	£700	£675	£650
Additional consultancy days rate (purchase as needed in the year at this discounted rate)	£850	£825	£800
Regular Shared Success review meetings with your CSM	Half-yearly	Three per year	Quarterly
Strategic Business Review Workshop	✗	Annually	Annually

### Packaged Services

#### PRE-PACKAGED SERVICES TO HELP YOU ON YOUR CRM JOURNEY

GDPR	Price on request
Workbooks Helping Hands (2 days)	£1,790
Reporting Workshop (1.5 days)	£ 1,342
Adobe Sign Integration (1 day)	£ 895
Xero Integration with Zapier (1 day)	£ 895



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

## Page Views

## Price

PER YEAR	PER MONTH	ANNUAL	MONTHLY
50,000	4,167	£1,200	£100
100,000	8,333	£1,800	£150
200,000	16,667	£3,000	£250
400,000	33,333	£5,400	£450
600,000	50,000	£6,600	£550
800,000	66,667	£7,200	£600
1,000,000	83,333	£7,800	£650
2,000,000	166,667	£10,800	£900
4,000,000	333,333	£16,800	£1,400
6,000,000	500,000	£22,200	£1,850
8,000,000	666,667	£27,000	£2,250
10,000,000	833,333	£31,200	£2,600

# WORKBOOKS GATORMAIL

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

## Sends

## Price

PER YEAR	PER MONTH	ANNUAL	MONTHLY
30,000	2,500	£480	£40
60,000	5,000	£960	£80
150,000	12,500	£2,280	£190
500,000	41,667	£3,000	£250
1,000,000	83,333	£4,200	£350
2,000,000	166,667	£4,800	£400
3,000,000	250,000	£6,000	£500
6,000,000	500,000	£9,600	£800
10,000,000	833,333	£15,000	£1,250
15,000,000	1,250,000	£19,200	£1,600
20,000,000	1,666,667	£22,800	£1,900



## GatorMail Optional Add-ons

ADD-ONS	PRICE PER YEAR
Advanced Inbox Checker	£600
SendForensics	£600
Advanced Email Workflow (10 active workflows)	£1,200
Multiple Domains (Set-up fee for each additional domain)	£100
Survey Tool	£600

To find out more about Web Insights or GatorMail contact us on  
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