

MORE OF WHAT YOU NEED

We see you just as you are. A unique business with its own unique set of challenges and needs.

Our powerful CRM platform is personalised and fine-tuned by our own experts precisely to your business goals. That way it lets you do exactly what you do – only better, faster and more efficiently

We are Workbooks and we work for YOU.

WORKBOOKS A PLATFORM TO MANAGE YOUR ENTIRE BUSINESS...



MARKETING

- Segment & target
- Capture & manage leads
- Dashboards & analytics
- Campaigns & events
- Marketing automation



SALES

- Track opportunities
- Manage pipeline
- Monitor performance
- Forecast accurately
- Workflows & approvals



ORDER FULFILMENT

- Quotations
- Sales order processing
- Invoicing
- Credit notes
- Digital signature



CUSTOMER SUPPORT

- Support ticketing
- Service metrics
- Unified experience
- Workflows & automation
- Profiling & renewals

...THAT DELIVERS ON YOUR BUSINESS GOALS



GROW
REVENUE



IMPROVE
CUSTOMER
EXPERIENCE



REDUCE
OPERATIONAL
COSTS



IMPROVE
DECISION
MAKING

WORKBOOKS IS REFRESHINGLY DIFFERENT

"Workbooks was dedicated to tailoring the solution around Rotary's specific business needs and invested the time to understand our challenges and pain points. We felt confident that Workbooks would deliver and help us achieve the outcomes we wanted for the business."

Chris Roessler, Vice President of Marketing & Advertising at Rotary

We are here to understand your business and help you get more of what you need. Our expert team is by your side to make sure that it all runs smoothly, from initial consultation, through to a successful implementation and ongoing support.

So it's no surprise that we have been voted Number 1 in CRM customer satisfaction ... for the last 6 years!

85% of G2 reviewers would recommend us
86% of G2 reviewers think our software meets their requirements
95% of G2 reviewers have rated Workbooks 4 to 5 stars

However it may come as a surprise that we are 50% cheaper than our rivals!

Isn't it time to get **MORE** of what you need?

WHY CHOOSE WORKBOOKS?

..... HIGH CLIENT RATING & ACCOLADES

GetApp
★★★★★
4.4 out of 5 (104 reviews)

TrustRadius
TOP RATED 2020
★★★★★
4.3 out of 5 (28 reviews)

Capterra
★★★★★
4.4 out of 5 (105 reviews)

G2
HIGH PERFORMER SUMMER 2021
★★★★★
4.3 out of 5 (493 reviews)



..... #1 CRM FOR CLIENT SATISFACTION WITH THE HIGHEST NPS SCORE



Source: Independent G2 Summer 2021 Report

..... JOIN A GROWING COMMUNITY OF USERS

..... OVER 1400 ORGANISATIONS TODAY RUN THEIR BUSINESS ON WORKBOOKS

