

## 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 WORKBOOKS CRM HELPS YOU 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

## WORKBOOKS DELIVERS ON ALL 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've been voted Number 1 in CRM customer satisfaction for the past six years. Although it may come as a surprise to learn that we are 50% cheaper than our rivals!

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

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

## WHY CHOOSE WORKBOOKS?

..... HIGH CLIENT RATING & ACCOLADES .....



..... #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 .....

