

*Drive business success with*



**Workbooks.com**

**Great customer relationships are the bedrock of a thriving business and the key to success.**

Workbooks provides an affordable, feature rich CRM solution that enables mid-sized organisations to efficiently acquire, convert and retain customers.

It has a powerful reporting tool that helps organisations make sense of their data and drive insightful decision making. It is easy to use and implement, for a quick ROI.



## MORE THAN CRM, WORKBOOKS IS A PLATFORM TO MANAGE YOUR 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

## THE VALUE OF WORKBOOKS



### GROW REVENUE



### IMPROVE CUSTOMER EXPERIENCE



### REDUCE OPERATIONAL COSTS



### IMPROVE DECISION MAKING

# WHAT MAKES US DIFFERENT?

## *Designed for the mid-market*

Our CRM solution provides many of the features required by small and mid-sized organisations 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 licence 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. See us as your trusted advisor and accountable partner. We'll guide you on your CRM journey every step of the way.

DATA  
MIGRATION

IMPLEMENTATION

CHANGE  
MANAGEMENT

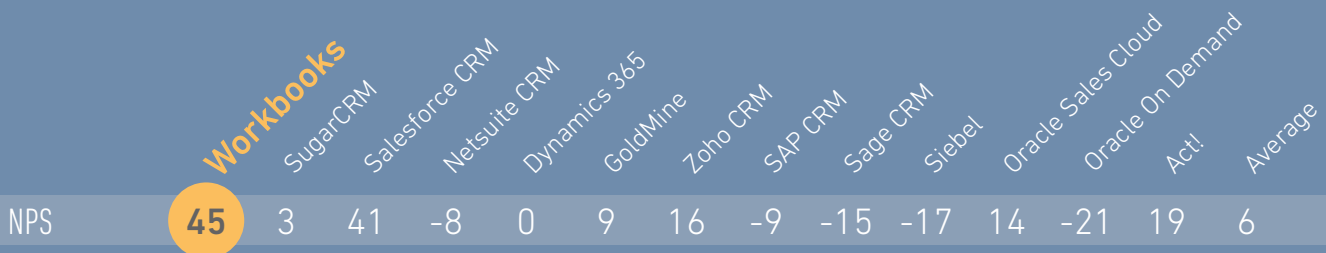
TRAINING

## WHY CHOOSE WORKBOOKS?

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



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



Source: Independent G2 Crowd Summer 2018 Report

..... JOIN A GROWING COMMUNITY OF USERS. ....

OVER 1400 ORGANISATIONS TODAY RUN THEIR BUSINESS ON WORKBOOKS.