

DRIVE BUSINESS SUCCESS WITH **WORKBOOKS CRM**

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

Workbooks provide an affordable, feature-rich Customer Relationship Management (CRM) solution that enables mid-sized organisations to efficiently acquire, convert and retain customers.



Lots of functionalities out-of-the-box



Free upgrades so you are always up-to-date



Highly configurable to work the way you work



Seamless integration with your everyday business applications



Highly secure UK datacentres for peace of mind



Fast implementation - days not months - and guaranteed ROI



Competitively priced



Ideal for businesses with limited IT resources

WORKBOOKS *for sales*

Workbooks CRM enables sales teams to work more effectively, better identify opportunities, close more deals and grow revenue.

Contact Management

Use every interaction to capture knowledge and map relationships. Synchronise with Outlook, Exchange/Office 365 or Google Apps.

Tracking Sales Activities

Record sales activities to ensure that opportunities are progressed effectively and no calls are overlooked.

Opportunity Management

Enforce common methodologies to drive execution excellence throughout the sales cycle and improve conversion rates.

Automated Workflows

Automate repetitive tasks and remove the admin burden so that reps can focus on building relationships and selling.

Sales Forecasting

Enable sales to forecast effectively. Easily identify your 'best case' and 'commit' and get a view on how likely you are to hit target.

Sales Performance Metrics

Generate Reports & Dashboards to get real-time visibility into pipeline and individual sales rep performance. Easily identify improvement areas.

Account Management

Get a 360° view of all customer interactions and track activity history. Schedule activities, track up-selling opportunities and identify 'at risk' customers.

Subscription / Renewal Management

Automatically remind customers when their contracts are due for renewal. Identify renewal rates and predict future subscription levels.

Quotations

Build professional looking quotations in a matter of minutes. Standardise terms & conditions. Implement approval workflows.

Order Creation & Processing

Turn quotes into orders with a single click. Track the status of orders as they are fulfilled and invoiced. Use electronic signature for speed and reduced paperwork.

..... *sales*

QUICK LOOK

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- ✓ **Improve sales execution** and win more business
- ✓ **Manage your sales team** with real-time reporting and activity tracking
- ✓ **Increase sales productivity** with automated workflows, easy collaboration and a mobile app accessible anytime anywhere
- ✓ **Improve forecasting** through visibility of your pipeline
- ✓ **Make insightful decisions**

WORKBOOKS *for marketing*

Workbooks CRM helps marketing departments run campaigns and generate more quality leads. Workbooks gives you the tools to execute your marketing strategy and measure ROI.

..... *marketing*

QUICK LOOK

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- ✓ **Maximise your lead generation**
- ✓ **Manage all your campaigns** and related activities in one place
- ✓ **Manage your data, segment and target** accurately
- ✓ **Know the ROI** of marketing activities so you can focus your budget on what really works
- ✓ **Align to sales** and drive timely follow-up

Data Management & Targeting

Manage account and contact information. Segment your data and make your marketing relevant and timely.

Lead Management & Scoring

Automate lead assignment for fast follow-up. Set alerts when follow-up is not happening. Use scoring to ensure sales spend their time on the opportunities most likely to convert.

Website Lead Capture

Automatically capture leads from your website via forms. Assign them to queues/campaigns and notify sales.

Website Analytics

Understand website visitors and pages viewed for better nurturing and follow-up. Create notifications when key leads visit your site.

Email Campaigns

Use templates to send targeted emails or integrate with leading email marketing solutions. Gain visibility and track metrics such as open & click rates for all campaigns.

Event Management

Plan, organise and promote events. Enable delegates to self-register and automatically schedule and send communications. Workbooks can also integrate with event management platforms like GoToWebinar or Eventbrite.

Marketing Metrics

Capture key information such as campaign ROI, lead volumes by source, lead conversion etc. Use Reports & Dashboards to ensure you have real-time information at your fingertips.

Track Marketing Activities

Manage day-to-day workload and keep on top of outstanding tasks to ensure project milestones are hit and campaigns are delivered on time.

Supplier Management

Manage suppliers' activities and communications in one place. Upload commercial documents, track expiry dates etc.

PO Management

Raise and easily track the status of Purchase Orders. Manage and audit sign-off. Manage your marketing expenditure effectively.

WORKBOOKS *for customer service*

Workbooks CRM empowers you to deliver exceptional customer service and drive high customer satisfaction.

Ticketing & Case Management

Automatically create Cases and set priorities. Assign tickets to individual users or groups (queues). Track all emails, notes and activities in one place. Synchronise with Outlook, Exchange/Office365 or Google Apps.

Customer Profiling

Personalise and tailor the approach of your service teams by utilising information you have collected about your customers.

Identify unhappy clients

Categorise customers into 'Red/Amber/Green' so you know which clients are happy and which ones are 'at risk'. Utilise Cases and Reports to manage issues to a successful conclusion.

Measure your Service Level Agreements (SLAs)

Track Service Level Agreements (SLAs) performance in real-time. Identify which Cases are overdue or about to breach SLAs.

Manage Agent Workload

See Open Cases by agent. Easily reassign Cases to different teams or users. Manage workload and resources allocation. Monitor trends by day, week, year and identify seasonal peaks.

Address re-occurring issues

'Slice and dice' your customer service data and get insight into re-occurring problems. Use the insight to deal with the source of the issues.

Multi-Channel Support

Manage Cases via an email inbox. Capture enquiries via a Web form. Allow customers to log into a Web portal and manage Cases online (self-service). Capture chat logs and integrate Social Media tools like Hootsuite.

Create a Knowledge Base

Record common clients' problems & solutions and create Knowledge Base Cases, ensuring the information is easy to find. Build email templates to ensure communication is consistent.

..... *customer service*

QUICK LOOK

- ✓ **Manage Cases**, answer customer questions quickly and effectively
- ✓ **Track activity history** with a complete view of the customer
- ✓ **Increase agent productivity** whilst reducing admin by automating repetitive tasks
- ✓ **Accurately measure your Service Level Agreements (SLAs)**
- ✓ **Service your customers** the way they want to be serviced