

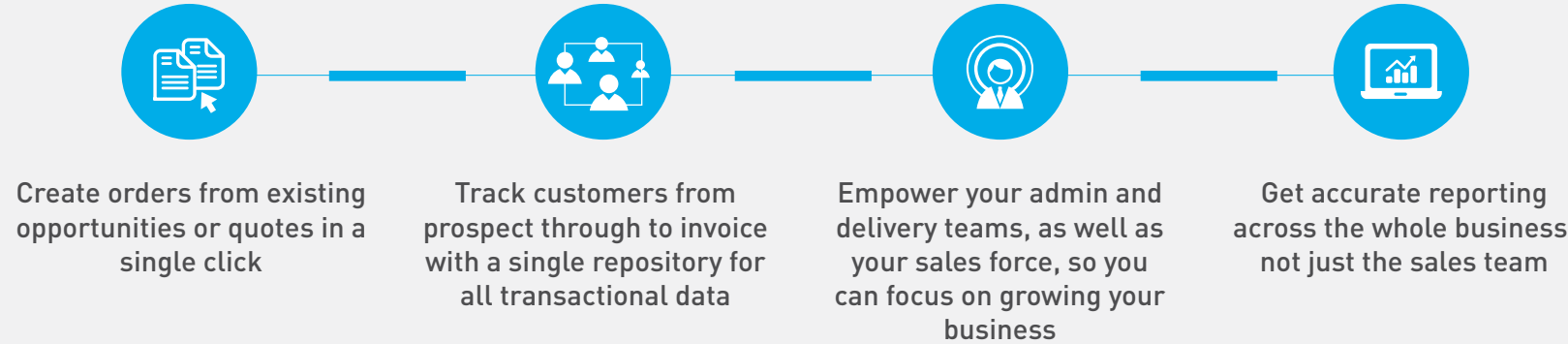
RELEASING THE POTENTIAL IN YOUR BUSINESS

Increase Revenue
Streamline Processes
Reduce Costs



Getting to grips with the complexities of your sales and marketing information is a constant challenge, especially when you are using multiple applications to store and access your data. From prospect to opportunity, opportunity to order and order to invoice, Workbooks can help release the potential in your business by streamlining your business processes and dramatically reducing the time it takes to move from prospect to cash.

Unlike our competitors, Workbooks offers two powerful CRM solutions: Workbooks CRM which provides the core CRM capabilities for marketing, sales and customer service functions; and Workbooks Business which extends to order tracking, fulfilment management, invoicing and contract management. By improving productivity across multiple functions and giving access to such a breadth of real-time management information, Workbooks enables you to make quicker, more informed business decisions to help grow your organisation:



Why Workbooks?

Easy to use

A simple web-based interface means you can access all your data anytime, anywhere.

Straightforward implementation

Migrate data, add users and customise settings at the click of a button – it really is that simple. And if you do want more support, we can provide you with as much or as little as you need. See Workbooks Professional Services.

Cost effective

No hardware or software costs – just a cost effective annual subscription based on your number of users.

No IT complexities

We take care of all the IT complexity so you don't have to. No hardware or software integration worries and guaranteed service levels. All you need is a computer with a web browser and you can access your business applications from anywhere.

Solutions designed for your needs

We believe that small and mid-size organisations need 'joined-up' business applications rather than 'silos of data'.

Workbooks CRM Edition enables you to join-up sales, marketing and customer services with tools that manage campaigns, leads, opportunities and support cases to give you one, consistent view of your customer engagement.

By providing your business with the information it needs quickly and easily, Workbooks helps you untangle the complexities of your prospect and customer data enabling you to make the right decisions to drive the business forward.

Workbooks Business Edition bridges the gap between your customer facing teams and your back office staff by incorporating order management and fulfilment, including all customer and supplier transactions, together with all the functionality of Workbooks CRM Edition.

By ensuring that critical business information can be accessed and shared across the company in real-time, your sales and management teams will be empowered to make faster, more informed business decisions, delivering higher productivity and reducing sales cycles at a lower cost to your business.



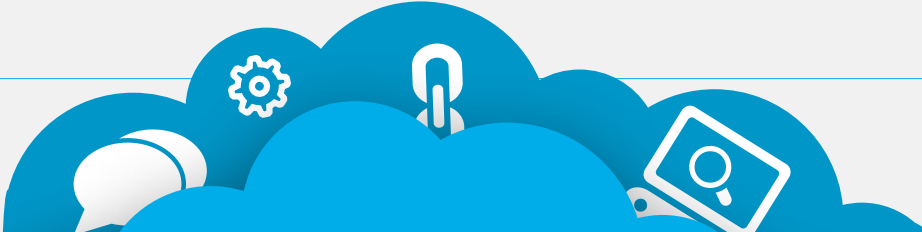
Workbooks CRM Edition

- Contact Management
- Email Integration
- Leads and Marketing Campaigns
- Integrate with Google Adwords
- Dashboards and Reports
- Opportunities and Forecasts
- Quoting Tools and Product Book
- Help Desk and Case Management

Workbooks Business Edition

Includes full Workbooks CRM functionality plus

- Sales Order Processing
- Order Fulfilment
- Supplier Ordering and Management



Delivering benefits across your organisation

CEO

“Unlike any previous solution we have tried, Workbooks links up all the elements of our prospect to cash process. At last, we have just one single database, accessed by sales, marketing and order processing. The time it takes now to move a prospect through to invoice stage is greatly reduced, the productivity of my admin teams has improved and finally I can see accurate reports from across the whole business. It really has changed the way this business is run.”

Sales Director

“Workbooks enables me to quickly track my opportunities, understand which deals are going to close and spot weaknesses in my pipeline early on. I can create in-depth reports easily and stay on top of all of the teams sales and opportunities. But best of all, I can quickly see what is happening in each territory and make quicker, more informed decisions to maximise sales. And my sales teams are happier as they are free to spend more time with their customers.”

Marketing Manager

“Workbooks gives me a complete view of my campaigns from creation to opportunities closed. I can set up new campaigns in minutes, import and segment data easily, create effective HTML emails and finally manage all my leads from one place. What’s more, I can easily track which leads convert to orders and invoices allowing me to accurately measure my return on investment against my actual costs, rather than just estimates.”

Customer Services Manager

“With Workbooks, all our customer information is held centrally and is accessible by all of the team – not just the sales people. I have a truly holistic view of customers and prospects that I haven’t had before. Above all, I can track which of my customers have renewed their support contracts and which haven’t. So I’m not giving away support for free and I am maximising my renewals.”

Financial Controller

“Workbooks has streamlined my sales order process. With a single click of a button I can convert quotes into sales orders and sales orders into invoices. I can even manage our suppliers through the system and easily create branded PDF documents such as purchase orders, invoices and credit notes. Additionally Workbooks reports and dashboards allow me to centrally track all my KPIs saving me time and stress each month.”

Simple, quick and easy implementation

Implementing Workbooks is so easy that many customers do it themselves with minimal support from us. However if you don’t have the time, inclination or resources, we can roll-out Workbooks for you.

Introducing Workbooks Professional Services. Workbooks Professional Services are here to provide you with all the information and strategic advice needed to correctly migrate, install and roll out a new CRM solution - ensuring maximum results.



Identify your project team

To ensure a successful implementation you will need the support of your employees. We will help you establish a project team, to suggest improvements where necessary and define the success criteria.



Define your requirements and map your business processes.

With your team, we will hold a requirements gathering workshop to define the scope of the project, identify key requirements and understand your business processes.



Configure Workbooks to meet your business needs

Based on the outcomes of the workshop, we will help you modify the preconfigured ‘out-of-the-box’ processes to reflect your own business processes and controls.



Data Migration

Workbooks provides a step-by-step Data Import Wizard which guides you through the process of importing data. Should you run into trouble, our team will be on hand to assist.



User Training

Now your system is configured and you have tested your data migration you can begin training your users. We provide on-line training videos in the help section of our website, or we can run on-site training.



Go Live

Start realising the value of Workbooks. Our support team will be available if required, however it is a good idea to make sure your power users and your project team are around to offer support during the first few days.

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