



WORKBOOKS CRM

EXTENDED PROFILE



OVERVIEW

Headquartered in Reading, UK, with an office also in Connecticut, US, Workbooks offers growing companies a SaaS platform to run their business and engage effectively with their customers – at an affordable price. Its core CRM services are aimed specifically at mid-market organizations and extend beyond sales, marketing, and customer services to include a full suite of marketing automation tools, as well as event management, order management and fulfillment, invoicing, and supplier management functionalities.

This is not a departmental solution, but a true end-to-end CRM solution. Workbooks design develop and implement their own software, which is used by customers to grow revenues, streamline business processes, get insights and improve their engagement with clients.

FEATURE OVERVIEW

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Workbooks CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
	✓

QUOTATION HANDLING	
TASK ASSIGNMENT	✗
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✗
NATIVE WEB APP	✗

HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	From free to £19/user/ month. Billed annually

SOFTWARE SCREENSHOTS



