

Workbooks adds CPQ capabilities to its CRM suite

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Workbooks (<http://www.workbooks.com>), the cloud-based CRM and marketing automation vendor, today announces the launch of Workbooks CPQ, a powerful and flexible module to quickly and easily configure, price and quote products and services.

Workbooks CPQ is a new module in the Workbooks Suite and incorporates technology from BlueprintCPQ (<http://www.blueprintcpq.com>), a market leading cloud vendor of Configure, Price, Quote software.

Workbooks CPQ is fully integrated into the Workbooks platform, enabling sales teams to manage complex pricing and configuration from Opportunities, Quotations or Order records directly within Workbooks CRM.

Kevin Geraghty, CEO of BlueprintCPQ comments: “Partnering with Workbooks to embed our market-leading CPQ solution and our powerful and flexible rules-based engine within Workbooks CRM is about significantly enhancing the whole sales management process for Workbooks users.”

A large proportion of the sales team’s time is being spent generating quotes, proposals and gaining approvals – time they are not spending with customers. That process can dramatically be reduced with the implementation of Workbooks CPQ. Sales teams can qualify enquiries, build quotations and manage the sales cycle all within Workbooks CRM, streamlining the entire process.

John Cheney, CEO of Workbooks adds: “With Workbooks CPQ, complicated product configurations and pricing challenges are a thing of the past. Sales teams are able to generate quotes for orders quickly and accurately and close deals faster. Quotes produced with Workbooks CPQ are automated according to pre-configured rules, ensuring error-free pricing that takes into account quantities, discounts, customisations, products options etc. With such capabilities, customers can establish stronger standardisation and consistency across their sales process, increase efficiency and revenues and decrease costs – a perfect addition for our mid-market audience looking to optimise their operations. ”

SAV Systems (<https://www.sav-systems.com/>), a leading UK provider of energy-efficient heating & ventilation solutions has already embraced Workbooks CPQ. Soren Ellegaard, Business Intelligence Manager at SAV Systems explains: “Our excel-based in-house built CPQ system was becoming impossible to manage and maintain. After a review of the leading CPQ solutions on the market, we decided to select Workbooks CPQ. The powerful and extremely flexible cloud-based solution could accommodate our complex needs well, with the added bonus of being fully integrated within our CRM platform. All the information contained in CRM is automatically populated within the quote – saving the team manual entry time. There is no room for errors with a simple but carefully crafted step-by-step configuration process. Approval of quotes is automated and quotes go straight to customers via CRM - making the quote process very easy for our teams. In the future, we are planning to go one step further and push quotes to our ERP system, once a quote has been turned into an order – making the overall sales process even quicker and sleeker.”

About Workbooks

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 extend beyond sales, marketing and customer services to include powerful marketing automation, event management, order management and

fulfilment, invoicing and supplier management functionalities – at a price which is typically 50-70% less than alternatives such as Salesforce or Microsoft.

Workbooks unites the entire organization around data and processes, promoting teamwork and collaboration. It provides a single 360-degree view of customers and the information is accessible at all customer touchpoints. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.

For more information, visit www.workbooks.com (<http://www.workbooks.com>).

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About BlueprintCPQ

BlueprintCPQ is a very powerful and flexible cloud-based platform for quickly and easily configuring, pricing and quoting combinations of interdependent products and services.

For more information, visit www.blueprintcpq.com (<http://www.blueprintcpq.com>)