B2B MARKETING AWARDS
FROM B2B MARKETING



Grand Prix Playbook:
How Workbooks Turned Brand Investment into Pipeline

Workbooks

MAKE your MARK

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From Safe Strategy to Standout Growth

We often talk about "cutting through" in B2B marketing, but few brands are willing to do what that actually requires. Differentiation can easily fall into a conceptual exercise. We often run workshops on positioning, debate value propositions, map messaging hierarchies and obsess over buyer personas.

Yet in crowded markets, true differentiation comes from the bold decisions a company risks taking. In 2024, Workbooks, a mid-market CRM provider competing in one of the most saturated categories in enterprise software, made a deliberate choice to abandon the safe playbook and invest in an emotionally resonant branding campaign.

The outcome was not only a Gold Award for 'Best Brand Initiative (Budget Under £100,000)' but also the coveted Grand Prix at the B2B Marketing Awards 2025.

The campaign generated a 33% uplift in branded search and 143% pipeline growth within just three months. While the creative execution was undeniably provocative, the underlying strategy was deliberate, data-driven and grounded in business reality. This is a great example of a strategically engineered brand intervention, rooted in research and aligned tightly with commercial objectives.



THE JUDGING PANEL DESCRIBE IT AS:

"A bold, disruptive campaign that showed how a challenger B2B brand can achieve standout results on a modest budget... Exceptional ROI and strong in-house execution make it an outstanding example of creativity and impact under £100,000."

The Real Constraint:
Consideration, Not Capability

Few B2B categories are as competitive as CRM. With more than 1,000 vendors, buyers tend to default to familiarity. Brand gravity is dominated by household names such as Salesforce, HubSpot and Microsoft.

Workbooks' product credentials were strong. Ranked #2 by TechRadar for both 'Best CRM Software of 2024' and 'Best CRM for Mid-size Businesses', and consistently recognized by G2 for performance and satisfaction, the issue was upstream. Dan Roche, CMO, Workbooks puts it bluntly:

"Once people know who we are, they frequently buy from us. Our challenge is creating that awareness in the market."

Brand awareness is the qualification for the shortlist when buying cycles begin. If you're not on the so-called "Day-1 list", you are rarely considered at a later stage. And in high-risk and strategic decisions, where CRM touches sales, marketing, customer service, finance and operations, buyers tend to default to brands they recognize.

Workbooks' growth ambition was explicit: increase new business by 40% by Q2 2025, but to achieve that, pipeline had to expand, which implied consideration at scale.

Speaking to us recently on the B2B Marketing Podcast, John Cheney, *CEO*, **Workbooks**, describes the structural challenge clearly:

> *The CRM market is a global market, and there are lots of different vendors in it... Our challenge is, how do we make prospects aware of what we do, given the relatively small size of our marketing investment and marketing budget, and the large market opportunity we've got to go at?"*



John Cheney
CEO
Workbooks

LISTEN TO THE PODCAST HERE:

Episode 208

Gold, Grand Prix and no BS:
Inside Workbooks' winning campaign

Research as Strategic Foundation

Before developing the creative, Workbooks commissioned customer and market research. John recalls the insight that shaped everything that followed:

"When you talk to customers, one of the things that really frustrates them about our space is the way that some of the vendors behave. Promising you the earth but when you come back a year later, your price has gone up 50%."

The research among more than 300 CRM decision-makers in mid-sized organizations reinforced this frustration. Buyers said they were unhappy with hidden fees, renewal price hikes, poor implementation support and excessive complexity.

By contrast, Workbooks's integrated model, which combines technology with implementation rather than relying on third-party resellers, resonated strongly. Its transparent pricing further reinforced this appeal.

John articulates the philosophical difference:

> *We have a very transparent business. We have pricing on our website, and that's what you pay. We don't heavily discount it. We don't ratchet the price up once we've got you on the platform."*

Overall, the market insight from the research was clear: there was widespread fatigue with CRM "bullsh*t". The plan was simply to articulate what buyers already felt.



The Defining Creative Decision

When Dan briefed agencies to produce a single, unifying idea that could scale across channels, two concepts emerged. One was a conventional "underdog" narrative, which was safe, competent and likely to blend into the sector's norm.

The second was a far more audacious and confrontational "No Bullsh*t", facing buyers' frustration head-on. Dan describes the initial internal reaction:

"When the marketing team first saw it, we all immediately loved it, but we were very concerned that perhaps the rest of the business might not go for this quite radical positioning."

The underdog route was safer. The "No Bullsh*t" concept was polarizing. When both concepts were presented to John, his response determined the direction:

> *If we're going to do something different and we're going to invest in marketing and brand, then we should do something that makes an impact, that is memorable, that makes a difference."*

This was not about shock value but memorability. If your brand does not register emotionally, it does not register at all. This moment also illustrates another key insight: bold brand strategy requires CEO-level alignment.



Dan Roche
CMO
Workbooks

Resonant Creative Execution

The hero asset was a 32-second film dramatizing CRM frustration. An office worker attempts to complete a task while pop-ups, pricing changes and usability issues accumulate. The metaphorical "bullsh*t" becomes literal. Dan explains the creative rationale:

"We couldn't really lean on the product or talk about Workbooks too much. We wanted to talk about the human challenges that people face when using their CRM."

The campaign avoided feature comparisons; instead it amplified emotional truth. "No Bullsh*t CRM" was unapologetically confrontational and unmistakenly humorous. From September to December 2024, commuters in 62 high-footfall locations around King's Cross and Liverpool Street in London encountered bold outdoor posters.

The imagery was deliberately exaggerated but the message was clear: CRM buyers are tired of jargon, hidden fees and arms-length vendors. The creative extended into digital banners and landing experiences, all reinforcing a singular proposition: Workbooks offers a clean, honest, mid-market CRM without the mess.

"What we were trying to do was to make people more aware of Workbooks, and to make them feel something that would help them take a personal risk, because changing a technology system is always a risk: personally, corporately and across the board," Dan adds.

For experienced B2B marketers, this is a crucial point: emotional response is not contrary to enterprise credibility. When anchored in truth, it can actually amplify it.



Breaking the Status Quo

Perhaps the most strategically interesting choice was the media mix. Instead of relying exclusively on tightly targeted digital channels, Workbooks invested heavily on out-of-home brand advertising, traditionally viewed as inefficient for niche enterprise audiences. Dan acknowledges this was unconventional:

> *Out of home is not something that many B2B brands do... but we felt that was a worthwhile investment. Most people are not expecting CRM to be on a billboard. So if you are in the market, or if you're considering changing a CRM, you're going to pay attention to it."*

Digital channels amplified reach and intent. Video distribution, programmatic display via StackAdapt, Meta placements for cost-effective reach, and email outreach fueled by ZoomInfo data ensured that awareness translated into measurable results.

Their best-performing email had the following subject line: "Do you have a bullsh*t CRM?" Dan recalls that it finally managed to get the attention of people they had been targeting for years. The insight is fundamental: brand creativity multiplies channel effectiveness.

It also had an impact on social media. LinkedIn's refusal to run the creative due to the choice of language inadvertently highlighted the campaign's disruptive edge. The website was overhauled to embed the campaign narrative and Workbooks' own CRM platform tracked and converted resulting leads, practicing what it preached. This integration elevated the initiative from creative stunt to strategic program.





Commercial Outcomes:
Brand as Multiplier

Crucially, Workbooks did not allow the creative platform to plateau. In late 2024, it conducted further research among 230 sales and marketing leaders, exploring peer perspectives on CRM red flags.

That insight fueled on-demand webinars, practical guidance on spotting warning signs and an interactive "Bull-o-meter" diagnostic tool used both online and at trade shows. The campaign evolved from awareness shock to advisory authority.

This progression, from provocation to peer-informed thought leadership, is what sustained momentum and deepened credibility. The quantitative results were substantial:

- **77 MILLION**
  impressions, exceeding the **50 million** objective.
- **33%**
  increase in branded search.
- **THREE-POINT**
  uplift in domain authority.
- **143%**
  increase in pipeline over the three months following launch.

The judging panel recognized this impact, commenting:

> *Love the boldness and the way the campaign stretched the boundaries of traditional B2B marketing, built on real customer interview feedback and amplified through so many aspects of media and content."*

Pipeline growth tracked steadily as the campaign rolled out, supporting ambitious revenue objectives. More subtly, the campaign repositioned marketing internally. Marketing moved from functional support to strategic driver.

A Challenger's Blueprint

What distinguishes this campaign is not its bold creative but its strategic precision. Workbooks understood that in complex B2B categories, growth is constrained less by product capability than by human behavior. Buyers tend to go for brands they recognize and when there's an emotional resonance.

"No Bullsh*t CRM" was not just loud but disciplined: it began with research, it aligned with genuine operational strengths, it secured executive backing, it integrated channels intelligently and it converted awareness into pipeline. And it did so on a sub-£100,000 budget in one of the toughest markets in B2B.

On giving advice to small businesses that worry they need huge budgets for great campaigns, Dan shared:

> *Being a smaller company, you have a smaller budget, but a bigger opportunity to be brave and do something different. There are fewer layers of approvals, which allows you to make marketing personal rather than corporate. Be bold."*

For marketing leaders seeking proof that brand investment belongs in the B2B mix, Workbooks has provided more than argument. It has provided evidence. In a category defined by noise, the most strategic move was clarity.

No Bullsh*t.

5 Key Insights for B2B Marketing Leaders

1. **Awareness Determines Eligibility:** If you are not recognized at the start of the buying journey, performance marketing cannot compensate.
2. **Research Grants Permission for Boldness:** Provocation grounded in customer insight becomes authority, not gimmick.
3. **Brand and Performance Are Multipliers:** Out-of-home built salience, digital converted intent and email reactivated dormant prospects.
4. **Executive Backing Is Non-Negotiable:** Bold creative requires CEO alignment and commercial framing.
5. **Emotional Encoding Drives Memory Structures:** In complex B2B categories, memorability is a competitive asset.

About Workbooks

Workbooks is the No-Bullsh*t CRM provider. They're the alternative to big-brand CRMs who often overcharge and underdeliver. This is underpinned by the fact their customers stay with them for 10 years+ on average. While TechRadarPro recently rated them as the best CRM for midsized businesses in 2026, for the third year running.

About B2B MARKETING

B2B Marketing is the world-renowned provider of insight, professional development, events and training for marketers and leaders in B2B.

Since our launch in 2004, we've amassed the largest global network of B2B marketers, giving us the unique ability to place your brand in the centre of the B2B buzz.

At the core of our business are the 85,000+ members of our website worldwide and five of the biggest and most influential annual events in the B2B calendar, alongside a host of webinars, podcasts, roundtables and training.

What can we do for you?

Our dedicated marketing and media solutions team can help you:

Build powerful brand recognition at the heart of the B2B industry.

Deliver your marketing content and proposition to the right audience at the right time through our weekly content emails.

Create compelling stories around your brand with headline-grabbing research and analysis through our reports.

Get face to face and engage with some of the industry's most influential decision-makers and buyers at our events.

Share your brand stories and content with our 160k+ subscribers, 80k+ monthly website users and 260k+ social media following.

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