The Buyer's Guide to Customer Relationship Management Software

Curated from End-User Reviews on:

trustradius

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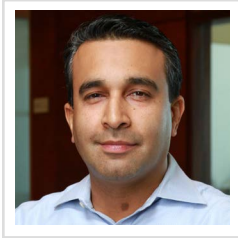
Table of Contents

Introduction

Why You Should Read This Guide - Vinay Bhagat, Founder & CEO, TrustRadius

TrustRadius is excited to publish our first ever Buyer's Guide to Customer Relationship Management Software. It offers practical guidance to help you find the best CRM software for your situation. Based on insights from real software users, it offers an in-depth exploration of the overall CRM market and product profiles for the leading vendors. Our research team analyzed 487 reviews and ratings by authenticated users on TrustRadius across 12 CRM software products, with the vast majority of reviews sourced independently of vendors.

About This Guide – Megan Headley, Research Director, TrustRadius

In the guide you will find:

» A summary of CRM software including common features, factors to consider in your evaluation, benefits of using CRM software, and pitfalls to avoid

» TrustMaps™ (two-dimensional charts) showing the leading CRM software products for enterprises, mid-size companies and small businesses, based on average "Likelihood to Recommend" ratings and search volumes on TrustRadius

» An in-depth evaluation of each of the 12 CRM software products covered in the guide, including pros and cons, market segment focus, tips from end users, and other insights gleaned from end-user reviews on TrustRadius

What Is Customer Relationship Management (CRM)?

Customer relationship management can refer to both a business strategy and a software system. The CRM philosophy assumes that the best way for an organization to increase sales and profitability is by focusing on relationships with customers. This customer-centric view can help businesses better understand and address customer needs and wants, thus optimizing the sales cycle and improving customer conversion, satisfaction, retention, and loyalty.

What Is Customer Relationship Management Software?

A critical part of a CRM strategy involves providing a seamless customer experience and presenting a unified face to the customer. Most businesses enlist the help of technology to track, automate, analyze, and optimize customer interactions throughout the sales lifecycle, from prospect to lead to purchase to renewal or upsell.

The technology can help unify and coordinate all customer-facing functions, including sales, marketing and customer service, and should provide a single source of truth for all customer data. Because it touches all customer-facing functions, CRM software is essentially a technology system that helps businesses identify, nurture, convert and retain customers.

Common Capabilities of CRM Software

CRM software began as contact management software, allowing for efficient storage and access to customer contact data. It evolved into sales force automation software, which in addition to contact management, helped to automate certain business tasks, thus improving employee efficiency and providing a more consistent sales process. Sales force automation software then evolved and expanded into the CRM software of today, which includes several feature sets and involves multiple business functions.

Customer data management

CRM software is designed to compile and organize customer data, including interactions across multiple business units and multiple channels, such as email, telephone, live chat, social media, and direct mail. Having a unified repository for customer data is critical in providing a seamless customer experience. For example, if a customer has just interacted with customer support because of a critical product bug, a sales rep needs to factor that experience into a renewal outreach. On the positive side, a salesperson can use interaction histories to better tailor an upsell pitch.

CRM features related to customer data management include:

- » Ability to find and merge duplicate contacts
- » Ability to upload/import contacts from a previous system
- » Auto-population of fields
- » Interaction logging and tracking
- » Integration with email clients (e.g., Outlook and Gmail)
- » Integration with social profile data and interaction histories

Sales force automation

Sales force automation involves streamlining many of the tasks involved in the sales process. Tasks that might be automated include sending emails, creating price quotes, tracking opportunities, updating contact information, and sales forecasting and reporting. Other tasks involved in sales force automation might include processing orders, monitoring inventory, and evaluating employee performance, though those functionalities are more likely to exist by integrating the CRM with other software products such as accounting, ERP, and HR systems.

Sales force automation can help increase employee efficiency, as well as standardize (and optimize) the sales process.

CRM features related to sales force automation include:

- » Workflow automation
- » Territory management
- » Quota management
- » Opportunity management
- » Sales forecasting
- » Pipeline visualization
- » Sales reporting
- » Activity management and logging
- » Contract management
- » Product & price list management
- » Quote management
- » Order management (through integration with accounting software)
- » Calendar management
- » Interaction tracking
- » Channel / partner relationship management

Marketing automation

Marketing automation involves streamlining certain marketing processes, allowing marketers to provide prospects with a more targeted, personalized experience at scale. Many organizations use a standalone marketing automation software product such as HubSpot or Marketo, often integrating it with their CRM system; however, many CRM systems provide some basic marketing automation functionalities.

CRM features related to marketing automation include:

- » Email marketing & triggered emails
- » List management
- » Lead management, including lead generation, scoring, qualification, routing and nurturing
- » Creation and customization of landing pages & web forms
- » Event marketing
- » Marketing analytics

Customer service & support

This component of CRM software helps automate and streamline customer service activities, such as help desk, call center and field service management. As with marketing automation, some companies use standalone software solutions for these capabilities such as Zendesk or Desk.com, often integrating them into the CRM system; however, CRM software also provides some of this functionality.

CRM features related to customer service & support include:

- » Ticketing
- » Knowledge base
- » Customer support portal
- » Case management
- » Live chat
- » Surveys
- » Call center management
- » Help desk management
- » Field service management
- » Support analytics

Project management

This component of CRM software helps users initiate, plan, collaborate on, execute, track and close projects. As with marketing automation and customer service, some companies use standalone software products for project management, such as Basecamp or Clarizen. However, some CRM software products also natively offer project management features. Some, such as WORK[etc], are more focused on project management.

CRM features related to project management include:

» Time sheets

» Task management

» Billing and invoicing management

» Social collaboration

» Workflow and approval processes

Social CRM

This component of CRM software helps companies leverage social media channels in engaging with customers. It can involve both pulling data from social profiles for inclusion in the contact record, as well as facilitating engagement with customers via social channels. Again, the CRM system might offer some of these features natively, or integrate with standalone social media management software products. Some products specialize in Social CRM, such as Nimble.

CRM features related to social CRM include:

» Social profile data integration

» Social media interaction tracking

» Social media monitoring

» Sentiment tracking and analysis

» Social media engagement

Collaboration

Because maintaining a unified face to the customer is a key component of the CRM strategy, many CRM software tools also facilitate internal collaboration among different users and business departments.

CRM features related to collaboration include:

» Chat

» Forums

» Polls

» Group discussions

» Task assignments

Factors to Consider when Evaluating CRM Software

In addition to the above sets of capabilities, there are other factors to consider when selecting a CRM system.

On-premise vs. cloud

On-premise (technically, "on-premises") software is installed and run on a company's own computers or servers. It typically involves an upfront purchase of the software and infrastructure, plus ongoing maintenance. Some potential advantages of an on-premise CRM software solution include enhanced security, more control over the data, more customization options, and offline access to data.

Traditionally, on-premise licensed software was the most common deployment model for CRM software products, but the cloud deployment model has become pervasive. This is also known as Software-as-a-Service, hosted, or on-demand software. In this case, the software vendor hosts all the data on its own servers, and the company rents the software, usually on a per-month/per-user basis. Users access and manipulate the data via web application. Typically, hosted CRM software involves lower upfront costs, less time to implement, and greater usability.

Hosted CRM software can be either single- or multi-tenant. Single-tenant means that each of the vendor's servers contains one organization's data. Multi-tenant means that computing resources (servers, databases, etc.) are shared among many different organizations. Multi-tenant software saves on hardware and energy costs and allows for greater backups and redundancy. However, the cost per API call tends to be higher for multi-tenant software, as a high volume of API calls from one organization affects the performance of the software for other "tenants." Also, the data from a multi-tenant CRM solution might not be as easily transferable (when switching solutions) as with a single-tenant solution.

Reporting and analytics

The ability to turn data into insights is critical for a CRM system. Reporting and analytics should cover the various use cases of the CRM system, including sales, marketing and customer support. In general, the system should allow users to evaluate existing sales, marketing and support processes for the purposes of optimization. Reports and dashboards should be customizable.

There are also specialized reporting and analytics software products focused on sales, such as C9 or InsightSquared, which integrate with CRM systems.

Customization

This addresses an organization's ability to configure the CRM software to best fit its specific use cases and workflow. Factors that make a CRM system more customizable include the ability to create custom fields and custom objects, the existence of a scripting environment, and the availability of an API for custom integration.

Ease of integration with 3rd-party systems

Because CRM technology acts as a database for all customer information, it can be a central component of achieving and acting on a "360-degree view of the customer," which is a key tenet to a customer-centric business strategy. Therefore, many organizations connect the CRM solution to other business technologies.

For example, by sending CRM data into your marketing automation software, you can implement marketing campaigns that are more highly targeted and personalized. Importing data into the CRM tool can also be beneficial. For example, pulling in data from your web analytics tool can provide additional insights on each customer. Other integrations, such as CRM and enterprise resource planning (ERP), might increase operational efficiency by connecting customers in the CRM to orders, invoices and payments in the ERP.

Systems that organizations might want to integrate with the CRM software include marketing automation, ERP, business intelligence, social media management, content management, web conferencing, billing, accounting, document signing, email marketing, help desk, e-commerce, and sales intelligence.

Usability

Lack of user adoption is often the biggest obstacle to achieving the benefits of CRM. If no one is inputting data, then the software is useless. Therefore, the usability of the CRM solution is a factor that cannot be ignored. It should be relatively easy and intuitive for sales representatives, customer service professionals, and business managers to input data, access data, and run reports. The more resistant team members are to the concept of CRM, the easier to use the software needs to be.

Security

Because CRM software is a repository for customer data, security is a concern for many organizations. Companies can help protect data integrity and privacy by using role-based authorization to give users access only to the data they need, and the ability to perform only the actions they need to perform. Multi-level authentication and single sign-on capability (a centralized authentication mechanism allowing the user to access multiple systems with a single, centrally managed password) also help reduce security risks.

Implementation cost / Ease of switching

Whether you're switching from another vendor, migrating from a homegrown solution, or you've been simply using spreadsheets, implementing CRM software can be resource intensive. It generally requires being very clear about your business processes, configuring the software to match those processes, and cleaning, organizing, and importing all of your data. As part of the TrustRadius review process, we ask end-users about their likelihood to continue using the software. One of the most common answers from CRM users is that, though they are unhappy with the product in some way, they will continue to renew because of the level of investment involved in setting up a CRM, and the difficulty of switching.

Scalability

Ideally, a CRM software product should be able to grow with your organization. If you're planning on growing, you'll probably need more storage space, more API calls, and more users. Your sales process might also change as you expand, so your CRM software should be both flexible and scalable.

Community

Many companies use a consultant or service provider to help implement a new CRM system and align it with business processes. One factor to consider is the availability of consultants or technical resources with expertise in the software, as well as the prevalence of online documentation and forums to provide further support.

A related factor is the availability of third-party apps, plug-ins and integrations, all of which help companies tailor their instance without a heavy reliance on technical resources.

Common Benefits of Using CRM Software

In general, CRM software (when implemented correctly and widely adopted) promises to increase profitability by increasing sales, improving customer satisfaction, and increasing operational and employee efficiency.

Revenue

Using a CRM can provide greater visibility into sales and marketing processes. This can help businesses optimize and shorten the sales cycle, increase customer retention, better take advantage of upselling and cross-selling opportunities, and increase sales force accountability.

Customer satisfaction

By maintaining one repository of customer data, organizations can better understand their customers, better address their needs, and provide a more seamless customer experience across different touch points. This can also help keep customers or sales tasks from slipping through the cracks.

Operational efficiency

By automating certain business processes and providing a single source of truth, CRM software can help increase operational and employee efficiency. Users can access the data they need without sending emails or spreadsheets back and forth. CRM software can also help create a more consistent sales cycle, and make the sales process person-independent. For example, when account managers leave the company, the company has access to customer interaction data and a substitute can easily pick up where the original account manager left off.

Pitfalls to Avoid when Implementing CRM Software

In order to provide the benefits listed above, CRM software much be implemented and used properly. Every organization is different; however, the following are some common mistakes that organizations make when initiating a CRM program.

Putting technology before business processes

CRM is no different than other software categories. Thinking that the technology is a silver bullet will get you nowhere. Most experts advise that organizations establish and implement business processes before even thinking about a technology solution. Once the business processes are in place, finding and implementing the right solution is much easier. Otherwise, you might overpay for a solution that provides unnecessary functionality, or spend valuable resources implementing the solution sub-optimally.

Neglecting to think about the end-users first

This dovetails with the usability issue mentioned above. You can't reap any benefits from a CRM system that no one uses. It's important to consider the needs and the workflow of the sales representatives, marketing and customer service professionals that will be inputting data into the system above all others. Those users

should be the first to experience the benefits of using the system, in order to encourage adoption. Features that make data insertion easy – such as the ability to sync data through your email inbox, and mobile access to the CRM – can also help facilitate adoption.

Being too ambitious

Implementing CRM can be a timely and costly initiative. One of the easiest ways to have a program fail is to try to do everything from the get-go – i.e., integrate the CRM with all other existing systems at once or utilize the most advanced features. It's best to prioritize a couple of initiatives, implement them and start to see the value before tackling other areas. Such 'quick wins' can help with user adoption.

The flipside to this pitfall is that a siloed CRM program won't be as successful as an organization-wide one. There is a delicate balance between trying to take on too much and being too limited.

Disorganized data

Having clearly established business processes can help you avoid this pitfall. It's important to understand up front what kind of data needs to be collected, how it should be labeled and organized, and what the processes for updating or changing data are. This helps avoid problems like having multiple entries for the same entity. It's also important for your organization (and your software) to be flexible to change, because as your CRM program matures, you might discover data necessities that you didn't foresee. It's best to address these changes structurally rather than using manual work-arounds, which can lead to disorganized data down the road.

Methodology

Different sized companies have differing CRM needs. We have thus compared 12 CRM software products across three different segments to help software buyers identify the solutions that most closely align with their needs. Our market segments are:

- » Enterprises: More than 1,000 employees
- » Mid-size Companies: 51-1,000 employees
- » Small Businesses: 1-50 employees

We have created a TrustMap™ for each market segment, revealing the leading CRM solutions based on end-user data on TrustRadius. More specifically, each TrustMap™ plots software products on two dimensions:

1. **Average User Rating:** The average "Likelihood to Recommend" rating - a representation of overall satisfaction - by users within that market segment who have written reviews or provided a rating on TrustRadius.

2. **Estimated Evaluation Frequency:** This metric indicates how often a product is evaluated on TrustRadius by companies within that market segment. It is measured by monthly unique page views of pages associated with a product, such as product descriptions, reviews and comparisons to other products. Products with large customer bases or those experiencing significant growth momentum are evaluated more frequently. The number is then multiplied by the percentage of customers within that market segment. This percentage is calculated based on the mix of user reviews and ratings on TrustRadius.

The red dotted line depicts the median user rating. All products above the red line are classified as "Top Rated" for that market segment. Products further to the right on the graphic are those products that are most frequently searched for on TrustRadius. High search volumes may indicate either positive or negative sentiment – people evaluating a product either to select or replace.

In order to be included in a TrustMap™, a product must have at least 10 reviews and ratings on TrustRadius. com (most have many more). All ratings and reviews come from authenticated end-users of the software and the vast majority of reviews were sourced independently of vendors.

Satisfaction ratings are one factor to consider in your search for a CRM solution. It's also important to consider your feature requirements and the particular strengths and weaknesses of each product. The rest of this report provides an evaluation of each software product, including pros and cons, market segment focus, and other insights gleaned from end-user reviews on TrustRadius.

The Best CRM Software Products for Enterprises (>1,000 employees)

Only four software products qualified for our enterprise TrustMap, based on having sufficient reviews from enterprise end-users. Salesforce is the leader in the space. Insightly is also highly rated among enterprise users; however, it's important to note that the product was originally focused on small business customers, and recently shifted focus to businesses of all sizes. Therefore, it may lack certain enterprise features. Enterprise users of Insightly might be using the product as a focused or departmental solution rather than an enterprise-wide deployment.

Of these four products, SAP CRM is the only one that is focused on the enterprise segment, with nearly 70% of its customer base being enterprises, per the mix of reviews and ratings on TrustRadius.

Enterprise CRM Software TrustMap™

TOP RATED

salesforce

insightly

Median 3.8

SAP CRM

Microsoft Dynamics

Average User Rating

5.0

4.5

4.0

3.5

3.0

2.5

0   240   480   720   960   1200

Estimated Evaluation Frequency by Enterprises
(Number of Monthly Unique Pageviews x Enterprise Segment Focus)

Based on ratings and reviews on TrustRadius.com as of 3/03/2015

trustradius™
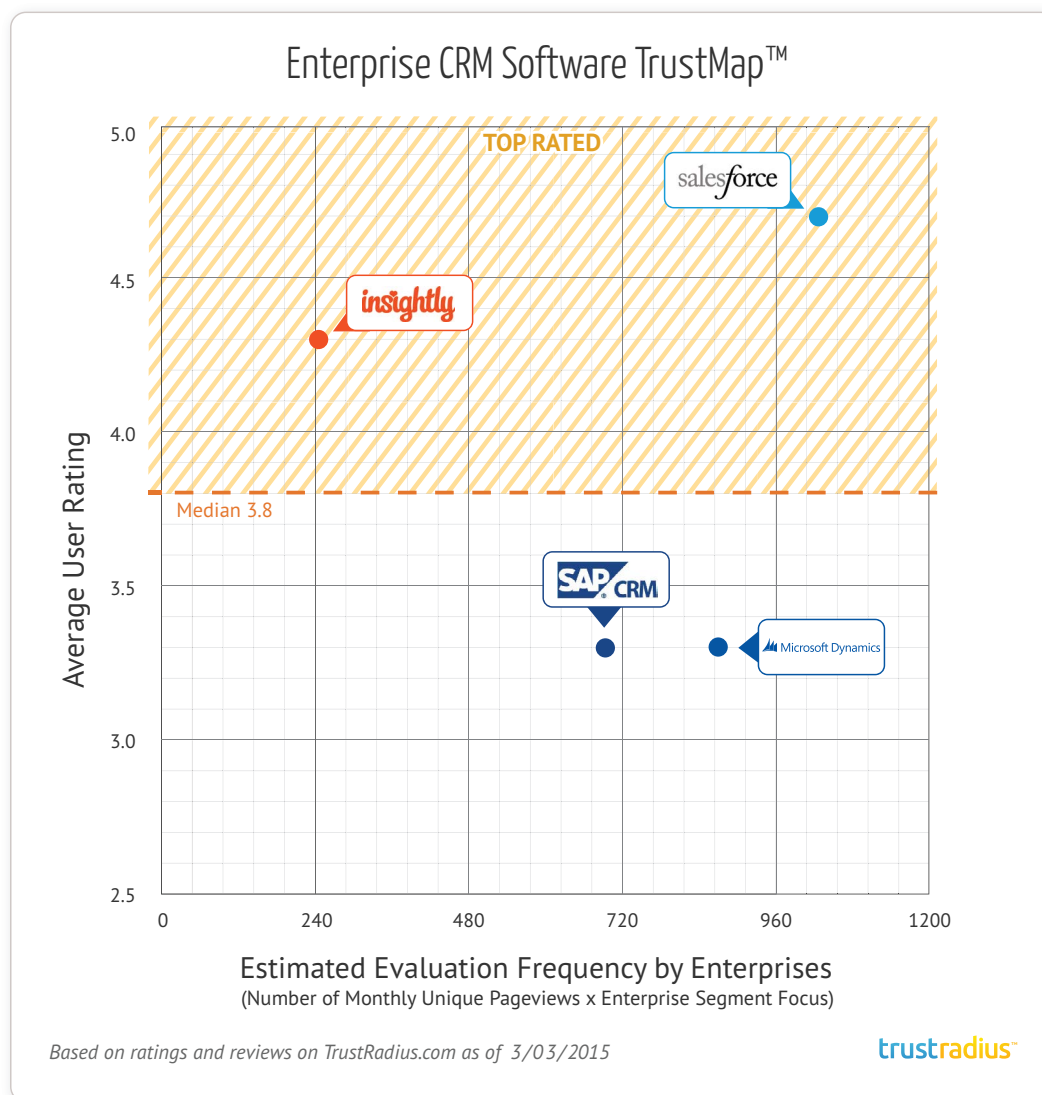
The Best CRM Software Products for Mid-size Companies (51-1,000 employees)

The Top Rated CRM software products among mid-size companies (those with 51-1,000 employees) are Salesforce, Infor CRM, Zoho CRM, Sage CRM, and Microsoft Dynamics CRM.

The CRM products that are most focused on the mid-size market segment, per the mix of reviews on TrustRadius, are NetSuite CRM+ (79%), Infor CRM (64%), Salesforce (56%) and Microsoft Dynamics CRM (56%).

Mid-Size CRM Software TrustMap™

Based on ratings and reviews on TrustRadius.com as of 3/03/2015

trustradius™
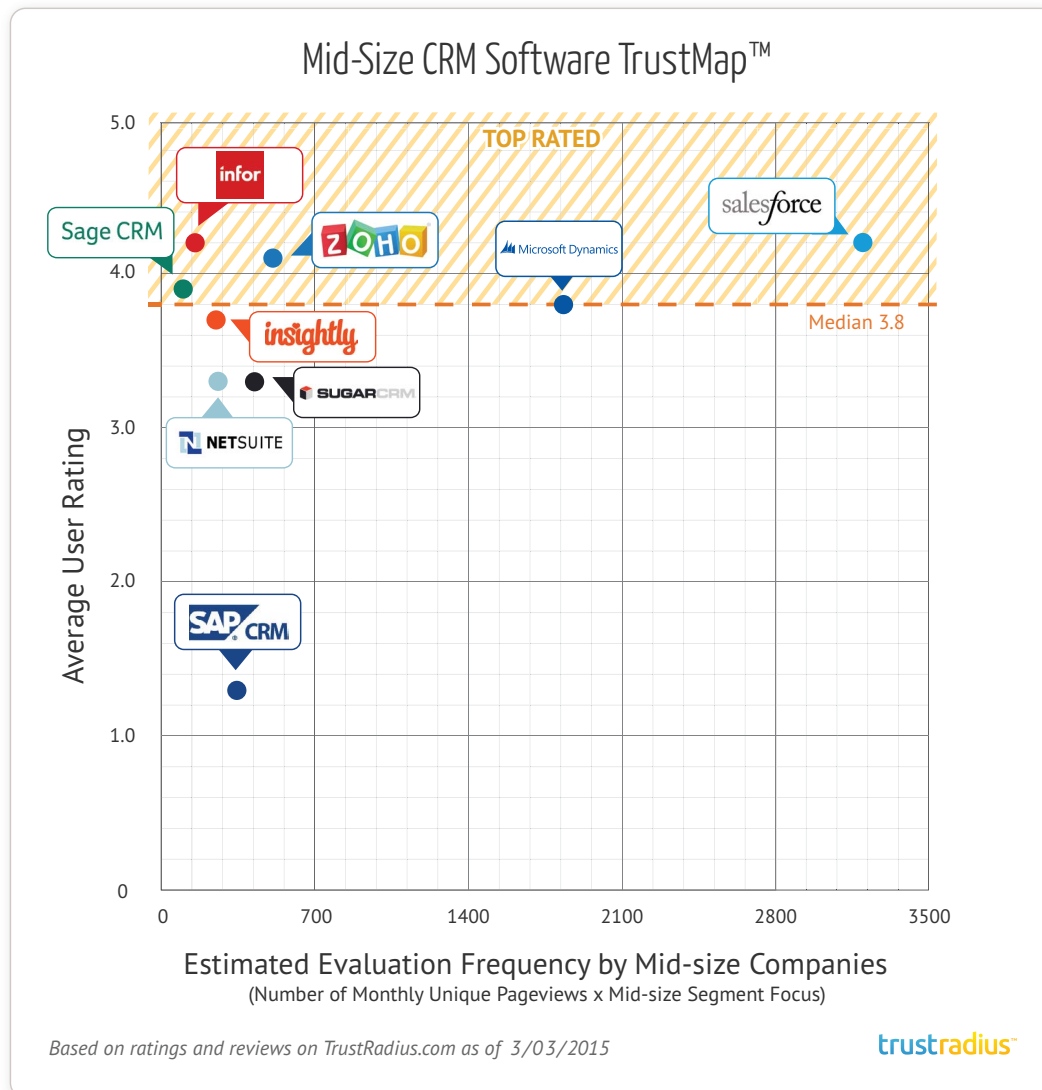
The Best CRM Software Products for Small Businesses (1-50 employees)

The Top Rated CRM products among small businesses (those with 50 employees or less) are Workbooks, WORK[etc] CRM, GreenRope, Salesforce, Insightly, and Sage CRM.

There are several products that are focused on the needs of small businesses. Many of them specialize in one additional aspect of CRM beyond sales, such as marketing automation or project management.

Among these products, those that are focused on the small business market segment (per the mix of reviews and ratings on TrustRadius) are WORK[etc] CRM (97%), GreenRope (92%), Workbooks (83%), Insightly (63%), SugarCRM (57%), and Sage CRM (53%).

Small Business CRM Software TrustMap™

Based on ratings and reviews on TrustRadius.com as of 3/03/2015
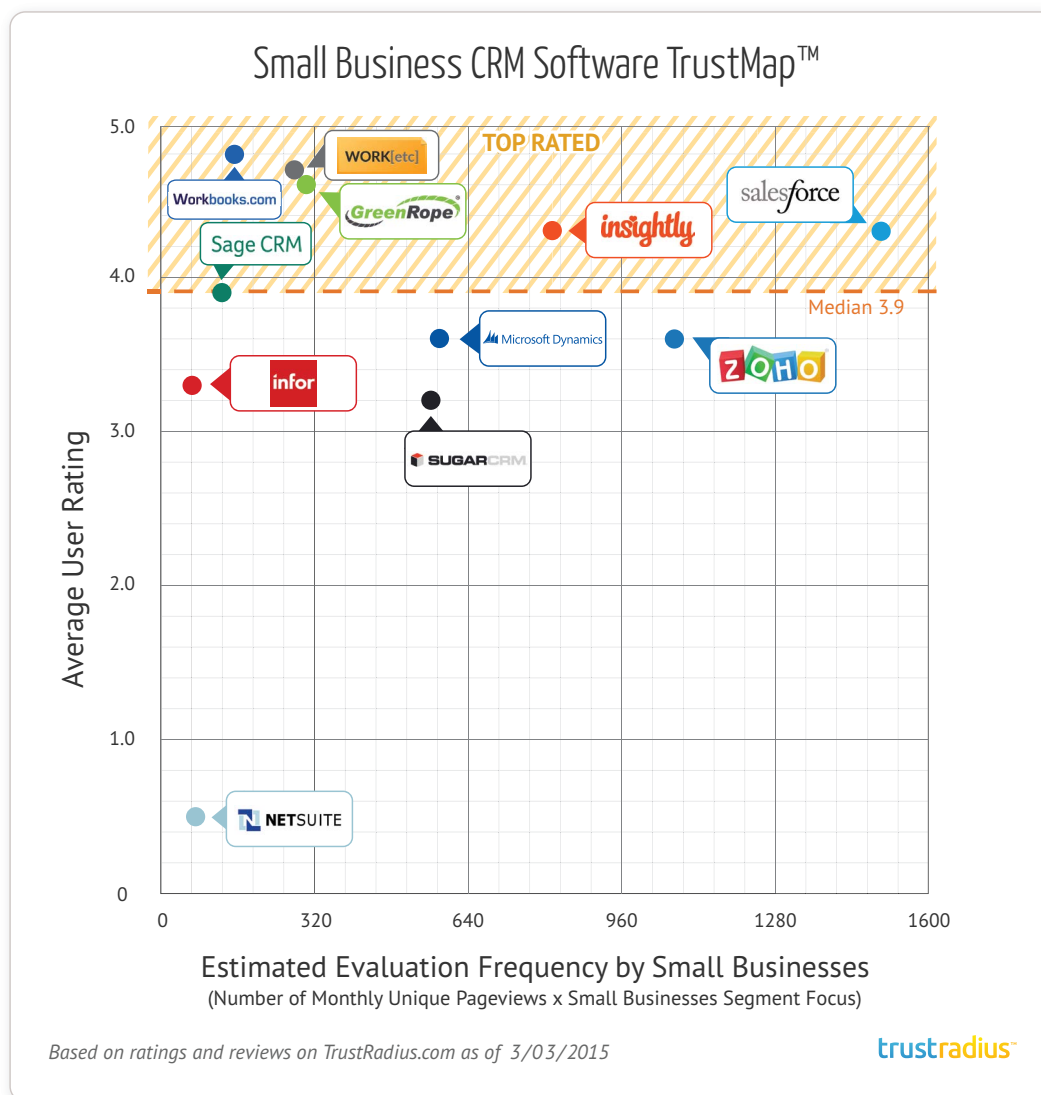
GreenRope
Customer Relationship Management Software

Software Profile & Review Summary

GreenRope offers online CRM and marketing automation software for small businesses. The company was founded in 2008 and is based in San Diego, California.

GreenRope customers include Underwood Gardens, CCHI, Happiness Tech LLC, and Pacific San Diego Magazine.

Company Status	Private
Customers	400 direct clients; 25 VARs (value-added resellers)
Employees (per LinkedIn)	19
Pricing	$149 to $499 per month (unlimited users)
Best Fit For	» Small businesses. » Companies looking for a combined marketing automation and CRM solution.

GreenRope Customer Distribution
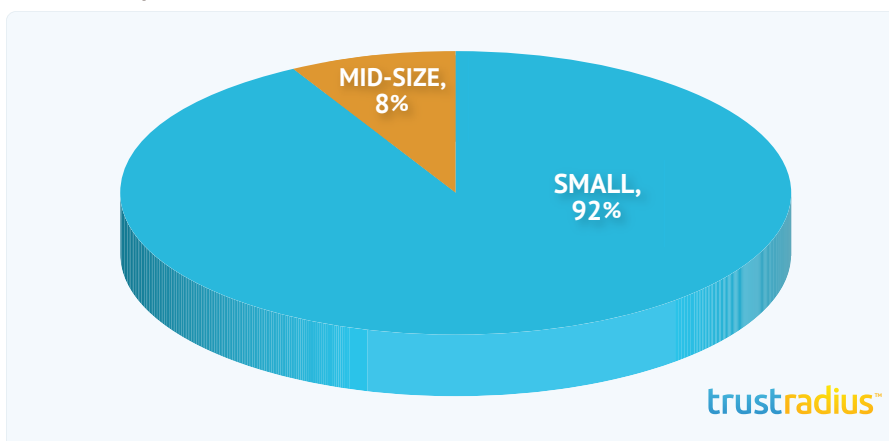
Source: (13) User reviews and ratings of GreenRope on TrustRadius

Aggregate User Ratings of GreenRope on TrustRadius

RATING ATTRIBUTE	GREENROPE	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	9.3	12	7.9
Likelihood to renew	9.6	8	8.3
Product usability	9.0	1	7.8

Source: (12) User reviews of GreenRope on TrustRadius

Summary of GreenRope Reviews

GREENROPE PROS	GREENROPE CONS
Email marketing Users like the email marketing features of GreenRope, including drip campaigns, list management, landing pages and web forms, and email tracking.	**Email templates** Though the email marketing features are strong, users say the email templates are inflexible or difficult to customize. They would also like to see more template options.
CRM Users like the contact management, opportunity tracking, and sales team workflow features as well.	**Minor UI issues** While overall the software is easy to use, users had varying suggestions for minor improvements in the UI and workflow, such as the ability to perform certain tasks with fewer clicks and better menu options.
Customer support The support team is helpful, the online documentation is robust, and the company listens to customer feedback.	
Price Users say the product is affordable, and like that it's month-to-month rather than an annual contract.	

Source: (12) User reviews of GreenRope on TrustRadius

Tips from GreenRope End-Users

"Greenrope is a terrific tool for any business that does a range of marketing tasks (email, drip campaigns, snail mail, social, direct marketing, online selling), lots of small projects, and shares and manages customer data among sales (both inside and outside) and marketing staff... If a company primarily deploys a large outside sales force and does little online marketing, then I'd recommend Salesforce over Greenrope. If a company is primarily engaged in large project management situations that involve outside parties in addition to employees, Greenrope would be less suited. But otherwise, Greenrope has been one of our most exciting software finds."

—Andrea Hill
CEO, Owner at Hill Management Group, LLC
Jan. 2015

"Key questions to ask:

» *Is the website builder visual with drag and drop based or difficult to learn?*

» *Does it integrate with Google Calendars without data being public?*

» *What parts of the system auto-populate in the CRM Record?*

» *What are the best practices for making the most use of the system from a functional perspective if you are a solopreneur?"*

—Consultant at a Management Consulting
company with 1-10 employees
Jan. 2015

GreenRope Response to Reviewer Feedback

GreenRope users save 80% in cost of ownership with our integrated sales and marketing tools, and average 75% growth after 12 months.

GreenRope's website builder is as easy to use as a word processor and includes the ability to create personalized URLs and custom content for recognized website visitors. Tracking also includes easy A/B testing for site and landing page optimization.

GreenRope's email builder is similar with personalization and looks and acts like most word processors, but has drag-and-drop building and the ability to modify colors and content in millions of design and layout combinations.

GreenRope is currently updating our entire user interface. We have updated many of our modules to reflect a more modern and sleek design. New reports, new contact layouts, a flatter design have great improved the UI and will continue to improve ease-of-use and the customer experience.

We actively connect with our users to gather feedback on the system, and make upgrades and add features based on user suggestions.

Infor CRM
Customer Relationship Management Software

Software Profile & Review Summary

This product was formerly Saleslogix, which Infor acquired from Swiftpage in 2014 and re-named Infor CRM. Infor is headquarted in New York City and offers several technology and services products, including enterprise resource planning, supply chain management, and asset management. Key industries include manufacturing, distribution, healthcare, retail, public sector, construction, hospitality, and professional services.

Some Infor CRM customers include Harry Rosen, GE Healthcare, Wells Fargo, UniFirst, AgReliant Genetics, and Amica Life Insurance Company.

Company Status	Private
Customers	1,700*
Employees (per LinkedIn)	11,518 (entire company)
Pricing	N/A
Best Fit For	» Mid-size companies » Customers of other Infor products

*Saleslogix, at time of acquisition: http://www.pcworld.com/article/2465480/infor-goes-up-against-salesforcecom-with-saleslogix-acquisition.html

Infor CRM Customer Distribution

ENTERPRISE, 9%
SMALL, 27%
MID-SIZE, 64%
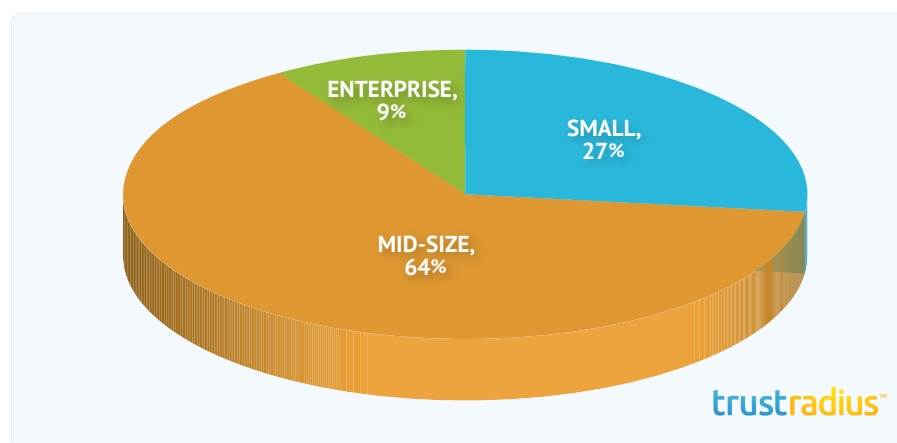
Source: (13) User reviews and ratings of Infor CRM on TrustRadius

Aggregate User Ratings of Infor CRM on TrustRadius

RATING ATTRIBUTE	INFOR CRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	7.9	11	7.9
Likelihood to renew	9.1	8	8.3
Product usability	7.0	3	7.8
Support	8.0	1	7.8

Source: (11) User reviews of Infor CRM on TrustRadius

Summary of Infor CRM Reviews

INFOR CRM PROS	INFOR CRM CONS
Flexible; customizable Infor CRM is available through on-premises or hosted deployment. The software can be customized to fit your industry or particular needs.	**Interface design** The look and feel of the interface is outdated.
User management Users like the ability to manage individual user access to the software at a very granular level.	**Integrations** Users would like to see additional or improved integrations with other systems, including contact management software and Microsoft Outlook.
Ease of use Infor CRM is user-friendly for sales reps and other day-to-day users.	
Performance Users are divided on Infor CRM's performance. Some say it's stable and reliable. Others say the application can be slow.	

Source: (11) User reviews of Infor CRM on TrustRadius

Tips from Infor CRM End-Users

"If you do need your system customized, its important that you have a competent database administrator (preferably in-house), as there are always tweaks or changes to be made."

—Administrator at an Investment
Management company with 11-50 employees
Jan. 2015

"It is well suited if your business needs lots of custom processes- find a good vendor...
Key question: think about where your business is going to be in 5-10 years, and will this CRM solution be able
to grow with us?"

—John Collman
Product Support Manager at ParishSOFT
Nov. 2014

"I would always choose to have end users involved in the selection process. I would have liked to have a user
representative from each business unit. We used a combination of managers and users to select, along with
an implementation committee. This worked well for us, but we found that you can't please everyone all of
the time...the people not involved in the selection process didn't "buy in" to the usage as quickly as the users
involved in the selection process."

—Christopher Composto
Vice President eCommunications and Marketing at Ambac
Nov. 2014

Infor CRM to Reviewer Feedback

Infor CRM has been a leader and innovator in the CRM industry for more than 15 years as evidenced by numerous awards, including back-to-back (2012, 2013) Gartner and 1to1 Media CRM Excellence awards, winning for sales excellence, sales force automation, and superior Mobile CRM. Infor CRM was also recognized by Nucleus Research (2015) as a CRM leader.

As of Infor's 2014 acquisition and subsequent investment, Infor CRM is equipped with a new user interface (v8.1 Update 05) and significant platform enhancements. Infor CRM's leadership in the CRM space is further cemented through its alignment with the Infor strategies of 1) Work is Beautiful, 2) Cloud first 3) Industry-specific CRM. All of these build upon the core product vision of taking CRM where people work, as demonstrated by Infor CRM Xbar for Microsoft® Outlook®, which gives users CRM embedded inside their inbox and turns unstructured emails into tangible contacts, tasks, opportunities, and more. Coupled with Infor CRM Gmail™ Sync, Infor CRM is bringing CRM inside the application users know and love.

Existing and prospective customers can be confident that Infor CRM is the right choice for their CRM needs because it is backed by Infor, a company that is fundamentally changing the way information is published in the enterprise, with over 73,000 customers in more than 200 countries and territories.

Insightly
Customer Relationship Management Software

Software Profile & Review Summary

Insightly is a web-based CRM and project management solution. The vendor recently shifted focus from SMBs to businesses of all sizes. The company was founded in 2009 and is based in San Francisco, California.

Insightly customers include ShuttleCloud, Iron Horse Brewery, Keller Williams and Lifeline Response.

Company Status	Private
Customers	N/A
Employees (per LinkedIn)	39
Pricing	Free to $129 per month per user. See vendor's pricing page for details on the five available plans.
Best Fit For	» Small businesses » Companies with task management needs » Companies who use Google apps

Insightly Customer Distribution

ENTERPRISE, 19%

MID-SIZE, 19%

SMALL, 63%
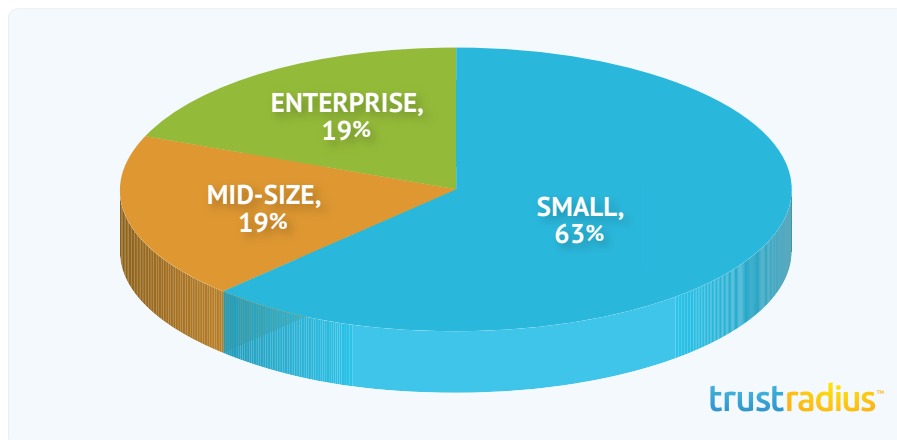
trustradius

Source: (19) User reviews and ratings of Insightly on TrustRadius

Aggregate User Ratings of Insightly on TrustRadius

RATING ATTRIBUTE	INSIGHTLY	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	8.7	12	7.9
Likelihood to renew	8.0	6	8.3
Product usability	9.2	5	7.8
Product availability	10	1	9.7
Product performance	10	1	9.5
Support	8.5	2	7.8
Implementation satisfaction	6.7	3	7.3

Source: (12) User reviews of Insightly on TrustRadius

Summary of Insightly Reviews

INSIGHTLY PROS	INSIGHTLY CONS
Task management Users particularly like the task management features of Insightly, such as the ability to set reminders, the calendar view of tasks, and the ability to assign leads and tasks to different users.	**Reporting** Users would like to see more advanced reporting options, such as the ability to schedule reports and save report templates.
Ease of use Insightly is easy to set up. The interface is clean and easy to use.	**Additional features / customization options** Users mention varying specific capabilities they would like to see, such as the ability to create different views for different users, the ability to sort and filter contacts by different attributes, and the ability to edit multiple fields at once.
Customizable Users like the ability to create custom fields and custom tags. Insightly can be customized to fit your business and workflow.	
Google apps integration The integration with Google apps allows users to easily save emails in Insightly. Users also like the integration with Dropbox.	
Price Users say Insightly is affordable.	
Mobile Overall, users like Insightly's mobile app. However, some say it's limited.	

Source: (12) User reviews of Insightly on TrustRadius

Tips from Insightly End-Users

> *"Insightly is well suited for businesses that need a forum for employees to share their work and to access common information. If only one employee drafts reports and then emails them to the rest of the company, then Insightly might not be necessary. However, if a team of workers consistently collaborate on reports, then Insightly is far superior to email."*

—Noah Morgenstein
Investment Banking Analyst at Watts Capital Group
Jan. 2015

> *"I find that if an SMB doesn't have their sales process already defined that they will usually have trouble seeing how Insightly or any other CRM for that matter can help them become more efficient and provide better customer interactions and experiences."*

—Bill Kindle
Consultant at Theorem Solutions
Feb. 2015

> *"I would also point out that reading the setup instructions is critical to porting over data from their current CRM, and to not be shy about asking technical support for help, they proved very helpful during the initial setup."*

—John Seelye
Director of Marketing at Sites USA
Dec. 2013

Insightly Response to Reviewer Feedback

By attracting great customers and being attentive to their needs, Insightly continues to expand our product features and grow with their businesses. Our updated pricing plans broaden our offerings to keep Insightly's CRM affordable for small businesses while including advanced account options for mid-sized and enterprise-level organizations.

Our responsive approach to customer requirements recently led us to add integrations for QuickBooks Online and Exchange calendars, introduce localized versions in five different languages, and connect users to a variety of file storage options they use day to day, including Dropbox, Google Drive, Box, OneDrive, and Evernote.

The first quarter of 2015 will include new Insightly features including lead management, business card scanning for our mobile apps, and native mass email capabilities, including sales templates and email scheduling. Later in the year, we have plans for advanced reporting options, calendars on mobile, integration with Gmail through browser extensions, and telephony functionality. We will also be launching a user community for customers to share their advice and best practices for implementing CRM in their industries and businesses.

Microsoft Dynamics CRM
Customer Relationship Management Software

Microsoft Dynamics

Software Profile & Review Summary

Microsoft Dynamics CRM is available via on-premise or cloud deployment. It was first launched in 2003, and is part of the Microsoft Dynamics suite of business applications, which also includes social listening, marketing, and enterprise resource planning.

Microsoft Dynamics CRM customers include Grant Thornton, Pandora, Metro Bank, and Nissan.

Company Status	Public
Customers	N/A
Employees (per LinkedIn)	113,776 (entire company)
Pricing	$65 per user per month
Best Fit For	» Companies who want an on-premise solution » Companies who use other Microsoft products » Mid-size companies

Microsoft Dynamics CRM Customer Distribution
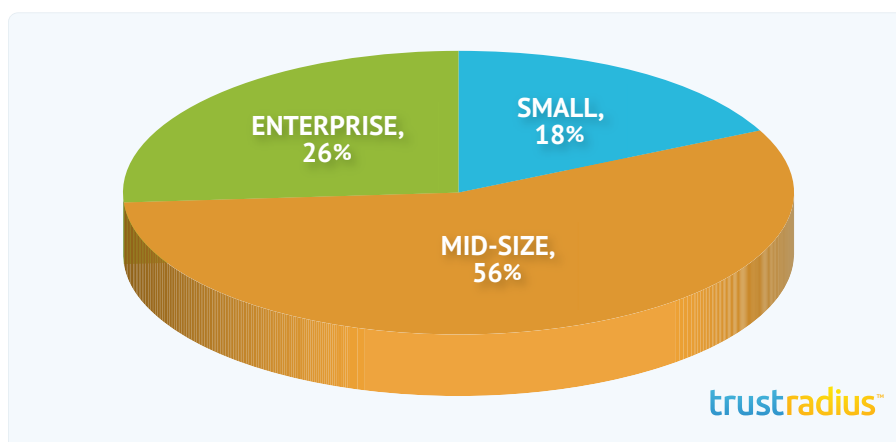
Source: (43) User reviews and ratings of Microsoft Dynamics CRM on TrustRadius

Aggregate User Ratings of Microsoft Dynamics CRM on TrustRadius

RATING ATTRIBUTE	MICROSOFT DYNAMICS CRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	7.3	28	7.9
Likelihood to renew	7.8	17	8.3
Product usability	5	3	7.8
Support	10	1	7.8
Implementation satisfaction	8.3	3	7.3

Source: (28) User reviews of Microsoft Dynamics CRM on TrustRadius

Summary of Microsoft Dynamics CRM Reviews

MICROSOFT DYNAMICS CRM PROS	MICROSOFT DYNAMICS CRM CONS
Integration with Outlook and Excel With a plug-in, users can easily log emails and track appointments and tasks in the CRM directly from Outlook. This helps increase user adoption. Users also like the tight integration with Excel, allowing them to export data for further manipulation.	**Upgrades** Software updates often break existing customizations or third-party integrations, forcing companies to spend resources re-doing those customizations.
Microsoft community and UI Being a part of the Microsoft family of products, this CRM has a familiar, easy-to-use interface, a robust community of support documentation and user groups, and a robust marketplace of third-party solutions to integrate.	**Marketing** The marketing automation functionality could be improved, as could the ability to integrate with third-party marketing automation software such as Marketo.
Customizable Online and on-premise versions are available. The software is highly customizable to fit specific industry or company needs, and offers a robust API. Users like the powerful user management / security options and the workflow engine, which allows non-technical users to customize and automate workflows.	**Outlook bugs** While users like the tight integration with Microsoft Outlook, they also experience some bugs and glitches when using the Outlook version of this CRM.

Source: (28) User reviews of Microsoft Dynamics CRM on TrustRadius

Tips from Infor CRM End-Users

"To me the bigger key or more important criteria is selecting a certified Microsoft partner to work with. Our partners have been great to work with when I get stuck or can't solve something on my own."

—Todd Jankowski
Marketing Specialist at ThyssenKrupp Rotek Incorporated
Jan. 2015

"Review your current processes and data. Think about how it will map into MS Dynamics CRM. If possible, obtain a trial license to the online version and perform a sample data import. This will allow you to see data within the entities and how the data relates and rolls up to the account. Keep in mind that customizations can be done."

—Christina Bayley
CRM Systems Analyst at AmeriQuest Business Services
Jan. 2015

"Implement in small bite sized chunks. CRM affects the entire organization, and going easy in the initial stages goes a long, long way in preventing the problems that many installs face half way through the implementation. Once your people adjust to the new communication processes, they will start to help tremendously with suggestions that WILL make the overall implementation a success."

—Chris Farias
Member at Delaware County Technical Schools Advisory Committee
Feb. 2015

Microsoft Dynamics CRM Response to Reviewer Feedback

» Microsoft Dynamics CRM can deliver significant productivity benefits by virtue of our seamless integration with other Microsoft products including Office, Yammer, Lync/Skype, Sharepoint and PowerBI, and many of our customers appreciate this. The product has inherent flexibility arising from the ability to configure most customizations needed, with deeper capability if required and this has enabled our partners and customers to deliver very specific vertical solutions.

» Microsoft has relatively recently had a major usability overhaul and we are seeing overwhelming positive response to this in market – customers on older versions will be reviewing and reflecting on an older paradigm.

» Microsoft in an older release had some minor bugs in outlook integration, but these have now been addressed.

» Microsoft is new to the marketing automation market, with our first release in June 2014 and new feature/functionality continues to be introduced at a rapid pace. Many Microsoft customers have successfully integrated marketing automation products from partners including Marketo globally.

» Prior to 2011, Microsoft had sometimes released new functionality that would impact integrations. Post 2013, Microsoft is committed to enabling customers to upgrade and maintain customization if customers use standard APIs and configuration tools.

NetSuite CRM+
Customer Relationship Management Software

Software Profile & Review Summary

NetSuite offers ERP, CRM, financial, e-commerce, HR and inventory software products. The company was founded in 1998, went public in 2007, and is headquartered in San Mateo, California.

NetSuite CRM+ customers include CallidusCloud, Prudential Locations, Guitar Center Pro, and Accuvant.

Company Status	Public
Customers	N/A
Employees (per LinkedIn)	3,127 (entire company)
Pricing	$49 to $399 per month for 1 full user
Best Fit For	» Companies who want tight integration between CRM and ERP software

NetSuite CRM+ Customer Distribution

SMALL, 21%

MID-SIZE, 79%
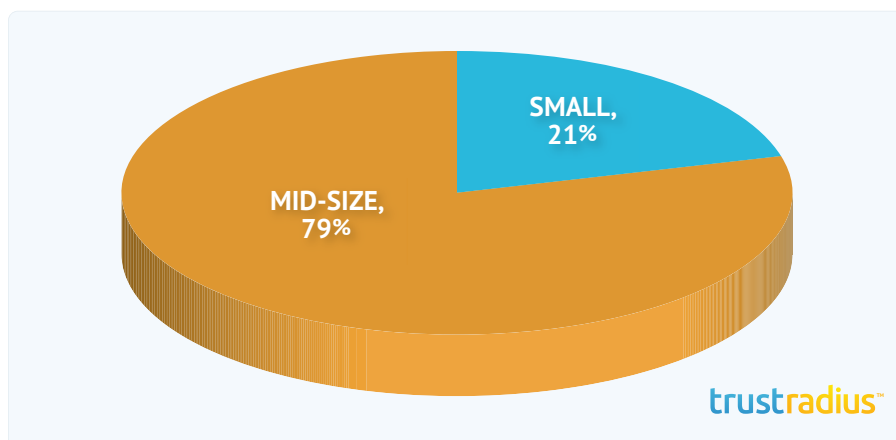
trustradius™

Source: (15) User reviews and ratings of NetSuite CRM+ on TrustRadius

Aggregate User Ratings of NetSuite CRM+ on TrustRadius

RATING ATTRIBUTE	NETSUITE CRM+	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	5.2	13	7.9
Likelihood to renew	6.3	9	8.3
Product usability	8.0	1	7.8
Support	4.5	2	7.8
Implementation satisfaction	4.0	3	7.3

Source: (13) User reviews of NetSuite CRM+ on TrustRadius

Summary of NetSuite CRM+ Reviews

NETSUITE CRM+ PROS	NETSUITE CRM+ CONS
All-in-one solution NetSuite has strong accounting and enterprise resource planning features, making it a good solution for companies who want to tie all of their systems together.	**Usability** The interface is not intuitive and is difficult to learn and navigate. In particular, the reporting system can be difficult to master.
Customizable With a robust set of features, NetSuite CRM+ can be customized to fit specific workflows or business processes.	**Technical support** While the support team can answer simple questions, responses to more complex problems are slow or unhelpful.
	Bugs Users report glitches, slow processing speeds, and outages.
	Marketing and e-commerce The marketing and e-commerce or shopping cart functionalities could be improved.
	Price The software is expensive.

Source: (13) User reviews of NetSuite CRM+ on TrustRadius

Tips from NetSuite CRM+ End-Users

"I feel if we had had NetSuite Services do our implementation, we would have used much more of the out-of-box functionality and had Best Practices instituted sooner. I would not recommend an outside services provider for the initial implementation."

—Stephanie Locke
Sales Operations Manager at InEight Inc.
Feb. 2015

*"If you don't have an experienced NetSuite Administrator or Consultant on-staff, plan on hiring one **before** you begin implementation.... Highly consider using a consultant for the implementation. Also be prepared to change your internal business processes to fit within NetSuite, as the opposite is much more difficult to maintain long-term."*

—Analyst in Information Technology
at a company with 501-1000 employees
Dec. 2014

"Your company and its processes need to be completely and perfectly defined before going into any implementation process."

—Manager in Information Technology
at a company with 11-50 employees
Dec. 2013

"Choosing NetSuite over other programs requires some thought. The main question to ask is, "what is your goal?" If you just want a case system and a way to track customers and leads, then Salesforce may be a better fit. If you want to incorporate all data from all departments, NetSuite is the only way to go."

—Administrator in Information Technology
at a company with 51-200 employees
Nov. 2013

NetSuite CRM+ Response to Reviewer Feedback

N/A

Sage CRM
Customer Relationship Management Software

Sage CRM

Software Profile & Review Summary

Sage CRM is a CRM platform offered in both online and on-premise editions for small and mid-sized businesses. In conjunction with Sage ERP X3, Sage CRM can also be a solution for enterprise companies. Sage also offers accounting, ERP, HR, payroll, construction, and other software products. The company was founded in 1981, went public in 1989, and is headquartered in the UK.

Sage CRM customers include Fuji Xerox, Australian Grand Prix, IFS School of Finance, and Avis.

Company Status	Public
Customers	14,000
Employees (per LinkedIn)	8,279 (entire company)
Pricing	$45 per user per month for Professional edition; Contact vendor for on-premise pricing
Best Fit For	» Small to mid-sized companies » Companies using Sage ERP

Sage CRM Customer Distribution
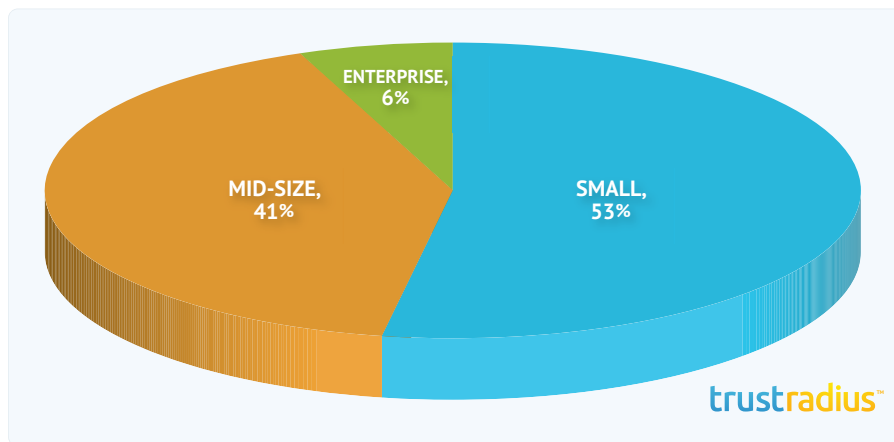
Source: (17) User reviews and ratings of Sage CRM on TrustRadius

Aggregate User Ratings of Sage CRM on TrustRadius

RATING ATTRIBUTE	SAGE CRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	8.3	14	7.9
Likelihood to renew	7.9	9	8.3

Source: (14) User reviews of Sage CRM on TrustRadius

Summary of Sage CRM Reviews

SAGE CRM PROS	SAGE CRM CONS
Workflow Users like the workflow functionality, which can help streamline and control business processes. In particular, users like the search/ find function, as well as the ability to take certain actions straight from a dashboard.	**Integration with Outlook** The integration with Microsoft Outlook can be buggy and unreliable.
Ease of use The interface is intuitive and user-friendly. Aside from a few ideas to improve navigation, users like the UI.	**Social media integration** Users would like to see the software integrate with social media channels.
Price Users say Sage CRM is affordable.	

Source: (14) User reviews of Sage CRM on TrustRadius

Tips from Sage CRM End-Users

"I recommend you ask details about the best deployment options for you. I would always ask questions relevent to how you currently do things and run your business to see what fits or might need to be customized to fit the solution. If important, ask about integration into other software you currently use. When integrated, the software becomes even more valuable to the organization."

—Kari-Ann B. Ryan
Marketing Director at WAC Consulting Group
Feb. 2015

"I think you need to think about who is going to be using this system, how they will be using this system, and what the end user and the people buying the system are expecting to get out of it. I feel if there is a clear, defined, documented process, it would serve the purchaser well to be sure this system can do exactly what they want it to do, can be altered if needed, the costs associated with that process, timelines, and compatibility with other systems."

—Consultant at an Information Technology and Services company with 1001-5000 employees
Jan. 2015

"To take advantage of all the features and benefits of the CRM, it is advisable to customize the tool and add new fields, workflows and templates to begin with, as well as to set up the product list. Sage has a very good help guide to learn from on how to do and customize the application, as well as how to manage users and data, and how to build and develop reports and dashboards."

—Luis Brea
Sales Systems Manager at Bupa Worldwide
July 2014

"After using three of four of the top CRM platforms, I look for ease of use first and foremost."

—Employee in Marketing at a Medical
Devices company with 51-200 employees
July 2014

Sage CRM Response to Reviewer Feedback

Sage CRM makes it as easy as possible to **manage customer relationships on social media**. You can:

» Provide better customer service by monitoring what customers are saying on Twitter

» Generate leads by searching for prospects on LinkedIn

» Gain business insight through customer research on Facebook

For more information about Sage CRM, visit our website and sign up for a trial today.

Salesforce
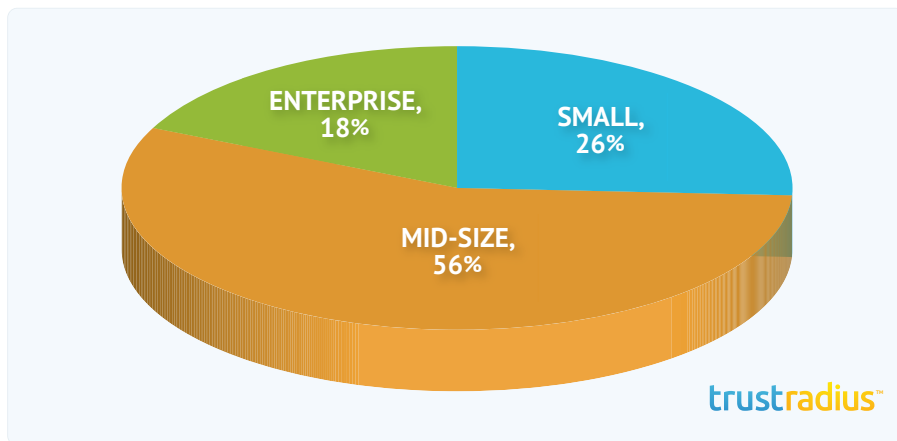## Customer Relationship Management Software

Software Profile & Review Summary

Salesforce offers many cloud-based software applications; however, its flagship CRM products are the Sales Cloud and Service Cloud; this profile covers the Sales Cloud. The company was founded in 1999 and is headquartered in San Francisco, California.

Salesforce customers span many industries and sizes and include Coca-Cola, Girl Scouts of America, Herman Miller, Carlo's Bakery, Charles Schwab, TOMS shoes, Chipotle, and Facebook.

Company Status	Public
Customers	More than 100,000
Employees (per LinkedIn)	14,692 (entire company)
Pricing	$25 to $250 per user per month
Best Fit For	» Companies with the resources on staff to implement and take advantage of the breadth of features

Salesforce Customer Distribution

ENTERPRISE, 18%

SMALL, 26%

MID-SIZE, 56%

trustradius

Source: (227) User reviews and ratings of Salesforce on TrustRadius

TOP RATED CRM SOFTWARE SMALL BUSINESSES — trustradius 2015

TOP RATED CRM SOFTWARE MID-SIZE COMPANIES — trustradius 2015

TOP RATED CRM SOFTWARE ENTERPRISES — trustradius 2015

Aggregate User Ratings of Salesforce on TrustRadius

RATING ATTRIBUTE	SALESFORCE	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	8.9	94	7.9
Likelihood to renew	9.7	43	8.3
Product usability	8.4	24	7.8
Product availability	9.5	23	9.7
Product performance	8.9	17	9.5
Support	6.9	26	7.8
In-person training	7.5	11	N/A
Online training	7.7	14	7.2
Implementation satisfaction	7.7	14	7.3

Source: (94) User reviews of Salesforce on TrustRadius

Summary of Salesforce Reviews

SALESFORCE PROS	SALESFORCE CONS
Robust Salesforce offers a very broad set of features, including data storage and organization, sales force automation, lead management, quote management, opportunity management, collaboration (through Chatter), work-flows, automation, accountability, and goal setting.	**Requires full-time administrator / developer** Having such a breadth of features and being so customiz-able, Salesforce often requires a full-time administrator and often a technical resource on staff to ensure proper setup and use. Otherwise, companies might end up only taking advantage of a fraction of what the platform has to offer.
Customizable Salesforce is highly customizable. There is a solid out-of-the-box foundation, especially for Sales, but compa-nies can customize their instance to their workflows, processes, metrics, terminology and culture.	**Price** Users say Salesforce is one of the more expensive options out there, especially when considering total cost of own-ership including additional storage, plug-ins, etc.
Breadth of resources: apps, plug-ins, integrations and community support Since Salesforce is so widely adopted, there are a broad range of options in terms of third-party apps and plug-ins through the AppExchange, as well as integrations with third-party software. Also, there is a vast community of resources in terms of online documentation, forums and support.	**Integration with Microsoft Outlook** Users say the integration with Outlook can be buggy or not function properly.
Usability Users have vastly difference experiences with Salesforce in terms of usability. Some say that the interface is intuitive and easy to use and learn. Others say that it takes months or even years of training and daily use to truly master the product.	
Reporting and analytics Salesforce reports provide increased visibility into KPIs, with compelling visuals. However, building custom reports can be difficult and require an experienced administrator.	

Source: (94) User reviews of Salesforce on TrustRadius

Tips from Salesforce End-Users

"I think it is best suited for larger organizations that can scale with the features and build the team to support it internally to avoid the costly partner network. Mid size companies can benefit by utilizing that network to quickly ramp up new capabilities."

—Todd Duclos
Center of Innovation and Excellence Lead at The Mosaic Company
Feb. 2015

"When first entering the Salesforce world, really sit down, understand what the tool can do and PLAN out your initial build along with a future development roadmap. Doing this, will greatly help and reduced redos."

—Jerry Clifft
Senior Business Analyst / Senior Salesforce.com Developer at Dish Network
Feb. 2015

"Professional edition is very limited so I would recommend against it if you have strong marketing involvement in your CRM management."

—Arpine Babloyan
Director of Demand Generation at Co3 Systems
Feb. 2015

"The only instances I've encountered where I did not think Salesforce was best fitted is for very small companies where the price didn't make sense for 2-5 users. A lot of the benefit of Salesforce is being able to customize it however you need, and true customization is only available with Enterprise and above."

—Joy Wallis
Salesforce.com Administrator at Spredfast
Feb. 2015

"Another question to ask is whether or not your company can delegate an individual to be a Salesforce.com administrator. In my opinion, the sheer breadth of functionality within Salesforce.com makes it necessary to have at least one person within your organization who knows the ins and outs and can assist when needed."

—Jessica Rush
Renewals Manager at Relias Learning
Feb. 2015

"Our motto as a company was 'if it's not in Salesforce -- it didn't happen."

—Sally Williams
Consultant at Fast Slow Motion
Jan. 2015

"At the end of it, it's good to listen to what the sales reps want to use, because if they don't enter in valid data, your data quality and efficiency suffer."

—Lee Cullom
President at Northcraft Analytics
Jan. 2015

Salesforce Response to Reviewer Feedback

N/A

SAP CRM
Customer Relationship Management Software

Software Profile & Review Summary

SAP offers many types of enterprise application software, but is perhaps best known as an ERP vendor. The company was founded in 1972 and is headquartered in Waldorf, Germany.

SAP CRM customers include Nespresso, ECENTA America, Inc, and KLA-Tencor.

Company Status	Public
Customers	N/A
Employees (per LinkedIn)	66,899 (entire company)
Pricing	N/A
Best Fit For	» Enterprises » Companies in the SAP ecosystem

SAP CRM Customer Distribution
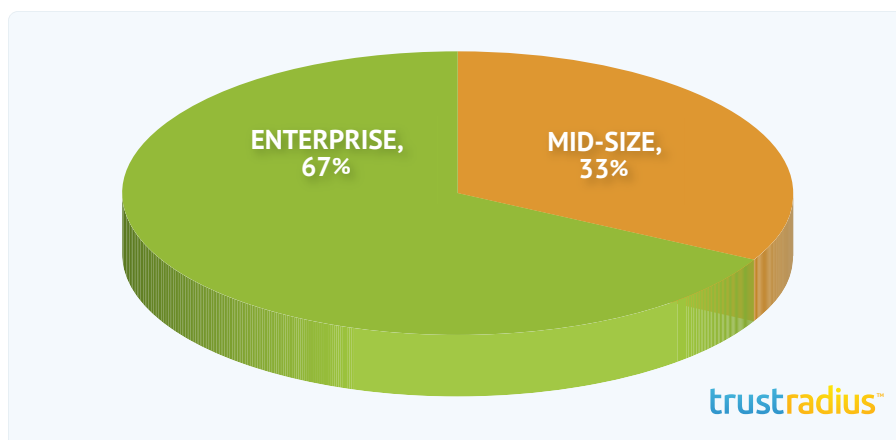
Source: (16) User reviews and ratings of SAP CRM on TrustRadius

Aggregate User Ratings of SAP CRM on TrustRadius

RATING ATTRIBUTE	SAP CRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	6.0	10	7.9
Likelihood to renew	9.0	4	8.3
Support	8.0	1	7.8

Source: (10) User reviews of SAP CRM on TrustRadius

Summary of SAP CRM Reviews

SAP CRM PROS	SAP CRM CONS
Integration with other SAP products SAP CRM integrates well with other SAP products such as ECC and ERP. It's great for businesses already in the SAP ecosystem.	**Usability** The interface is outdated and difficult to use, and can negatively affect user adoption.
Robust The software offers a robust set of features, including things like territory management, trade promotion management, campaign management, claims management, and call center integration.	**Performance** The software can be slow and clunky.
Customization Some users say SAP CRM is very flexible and can be adapted to pre-existing business processes. However, others say the software is difficult to customize and requires IT resources to do so.	

Source: (10) User reviews of SAP CRM on TrustRadius

Tips from SAP CRM End-Users

"Typically, these days there are a lot of considerations as to why a SaaS based CRM makes more sense. Implementation costs for CRM OnPrem are very high and durations from project kick-off to GoLive are long."

—Sebastian Jungels
Business Development Manager at ECENTA America, Inc
Jan. 2015

"The biggest deciding factors are going to be whether or not you're planning on integrating the system with other SAP components and whether or not you need specific functionality that isn't as strong in the competing systems. If you're looking for a standalone CRM option with standard functionality around Sales, Customer Service, and Marketing, Salesforce, SugarCRM, etc... are probably fine. On the other hand, if you have an SAP ERP system and you're looking to design end-to-end business processes across more than one system, then SAP CRM should be at the top of your list."

—Tom Leddy
Solution Architect at MillerCoors
Dec. 2014

"Are you already using an SAP ERP system? If so then integration is very easy and most of your master data can be downloaded from the ERP system which saves lot of time and effort!... Consider the infrastructure needs for SAP CRM. It's usually a little on the higher side compared to other systems... If you are looking for Analytics then keep in mind that most of the Analytics features in SAP CRM are dependent on using SAP BI."

—Anirudh Reddy
CRM Solution Lead at KLA-Tencor
Jan. 2015

"Make sure you have a solid understanding company wide on how you would like to implement this system and what you would use it for. Take the time, even if it takes months to do the work and have a solid plan on how your company would like to use the system now, and ten to twenty years from now. If you do the hard grunt work up front then it should help the implementation and use of the product be a success in your company."

—Sarah Geist
Business Analyst at Cupcake Carousel
Jan. 2015

SAP CRM Response to Reviewer Feedback

N/A

SugarCRM
Customer Relationship Management Software
## Software Profile & Review Summary

SugarCRM offers a free, open-source version for developers called Community Edition, as well as a commercial edition with three pricing tiers. The company was founded in 2004 and is based in Cupertino, California.

Some of SugarCRM customers include Program Productions, Redglaze Group, TengoInternet, Hilco Global, and BancVue.

Company Status	Private
Customers	N/A
Employees (per LinkedIn)	415
Pricing	Free Community Edition; $40 to $150 per user per month
Best Fit For	» Small to medium companies with the ability or need to customize

SugarCRM Customer Distribution

MID-SIZE, 43%
SMALL, 57%
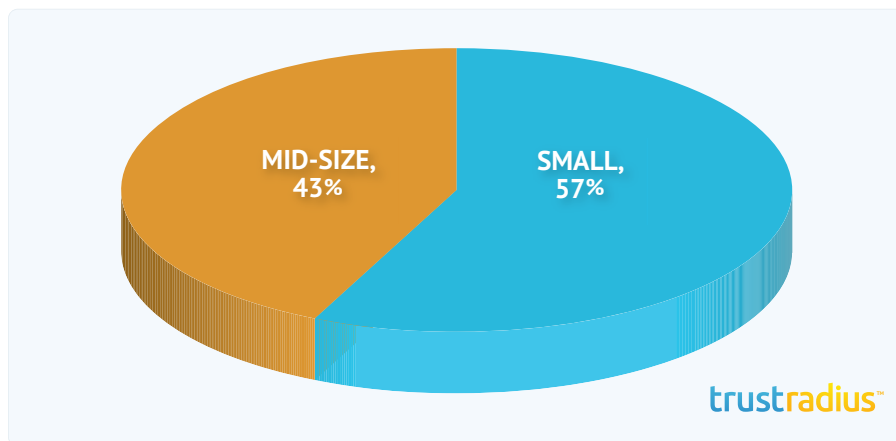
trustradius™

Source: (47) User reviews and ratings of SugarCRM on TrustRadius

Aggregate User Ratings of SugarCRM on TrustRadius

RATING ATTRIBUTE	SUGARCRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	6.6	29	7.9
Likelihood to renew	6.4	22	8.3
Product usability	9.0	2	7.8
Product availability	10	1	9.7
Product performance	10	1	9.5
Support	8.0	3	7.8
Implementation satisfaction	9.5	2	7.3

Source: (29) User reviews of SugarCRM on TrustRadius

Summary of SugarCRM Reviews

SUGARCRM PROS	SUGARCRM CONS
Customizable SugarCRM is robust and highly flexible. Users can create custom data fields and customize workflows according to their needs.	**Bugs / speed** Some users report glitches or general "clunkiness," as well as slow load and processing times.
Reporting Creating and editing custom reports is relatively easy.	**Email campaigns** The email marketing functionalities could be improved. For example, the HTML email templates can be temperamental, and list management is not robust.
Email sync Users can easily log emails through integration with Microsoft Outlook.	**Search** The search capability within the application could be improved. It can be difficult to find contacts or accounts without the exact punctuation and wording.
	Duplicates Detecting and merging duplicate entries is not easy.
Usability Users are divided on the usability of SugarCRM. Many say the interface is intuitive and easy to learn and use. However, some say the UX could be improved (for example, certain actions require too many clicks), and the design of the interface is not attractive.	

Source: (29) User reviews of SugarCRM on TrustRadius

Tips from SugarCRM End-Users

"SugarCRM is flexible enough to adapt to the way you do business. I would focus on asking questions of all CRM providers about that. Just because the software is designed for the way developers think your sales team should work, doesn't mean it makes sense for how you actually do business."

—Sid Haas
Vice President of Business Development at LKCS
Jan. 2015

"The customization is a breeze no matter what industry you are in. As long as you have a workflow to start with, Sugar can easily fall in line. Do your research and make sure that the system has what you need for your business."

—Joelle DiBenedetto
CRM Administrator at The Mystic Reader
Dec. 2013

"When determining if Sugar is the right CRM system for your company I would determine if you would benefit from the customization opportunities or need something more out of the box. If you are planning on extensive customization then make sure you have the internal support of an administrator who can work with developers - third party or internal - to implement those pieces. I also recommend knowing the reports that your people will require to present and talk to Sugar about your needs. If you decide to implement SugarCRM explore the third party plugins and integrate what you can from the beginning."

—Jennifer Stewart
Marketing Manager & CRM Administrator at Lincoln Healthcare Group
Dec. 2013

SugarCRM Response to Reviewer Feedback

N/A

Workbooks
Customer Relationship Management Software

Software Profile & Review Summary

Workbooks provides online CRM software and other business applications. The company was founded in 2007 and is headquartered in the UK.

Workbooks customers include Amstore, Broker Profile, EST Marketing, and CRCC Asia.

Company Status	Private
Customers	N/A
Employees (per LinkedIn)	32
Pricing	Free to $70 per user per month
Best Fit For	» Small to mid-sized companies

Workbooks Customer Distribution
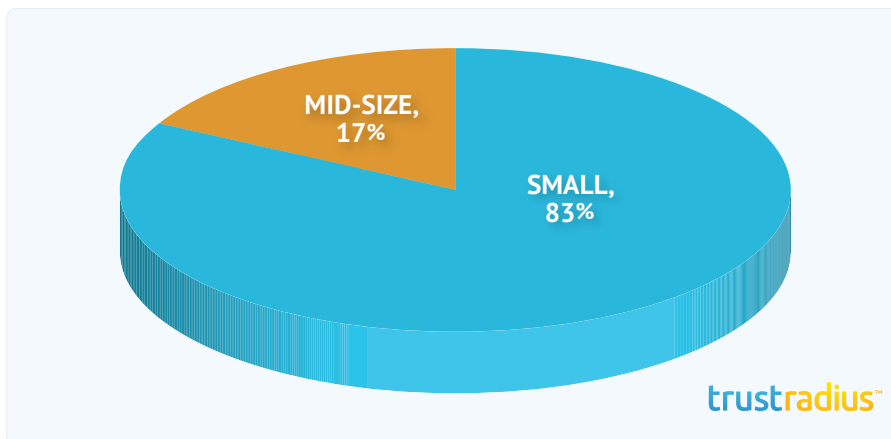
Source: (19) User reviews and ratings of Workbooks on TrustRadius

Aggregate User Ratings of Workbooks on TrustRadius

RATING ATTRIBUTE	WORKBOOKS	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	9.5	11	7.9
Likelihood to renew	9.6	7	8.3
Support	9.0	1	7.8

Source: (11) User reviews of Workbooks on TrustRadius

Summary of Workbooks Reviews

WORKBOOKS PROS	WORKBOOKS CONS
Usability The interface is intuitive and easy to use and administer.	**Integration with Outlook** Users would like to see improved integration with Microsoft Outlook.
Customizable Workbooks can be customized through features such as custom fields, multiple form layouts, different user views, and custom relationships between objects (e.g. companies and contacts).	**Building dashboards and reports** Users like the reports once created, but say it can take a bit of work to get the reports and dashboards built correctly.
Automated reports Users like the ability to set up automated / scheduled reports. This helps avoid missed deadlines, leads not followed up with, etc.	**Mobile access** Users would like to see a mobile and iPad app.
Price Users say Workbooks is more affordable than some competitors.	

Source: (11) User reviews of Workbooks on TrustRadius

Tips from Workbooks End-Users

"If we were going through the process again, I would focus more around how data is managed, and how we as Connection2 would like to work. The platform is good, but we are using it slightly differently to how it was designed."

—Phil Brooks
Operations Director at Connection2
Jan. 2015

"It is recommended to do a good requirements gathering and use a phased implementation approach such that you stay on track. The Workbooks team is very happy to support with this."

—Peter Lindeman
Managing Director at WeCloud Benelux
Jan. 2015

"As with all CRMs, it strongly depends on how well it is being maintained and used by the users. We have found that with the ease of use of Workbooks it's become much less of an issue. Whereas before, we didn't only look at the data produced but actually had to keep track of the system being used accurately. We constantly needed to keep tabs on the actual level of maintaining."

—Martijn Daalder
Media Advisor / Sales Director at i.o.v. MMD Media Selectieve verkoop
Dec. 2014

Workbooks Response to Reviewer Feedback

"We are pleased to be rated the highest in the CRM Software TrustMap user ratings. Workbooks CRM is again recognised to be delivering a quality, robust cloud service to customers and one that leads against other CRM vendors where we are often radically more cost effective. We have delivered a consistently high availability to customers since inception and continue to be chosen over big name brands for our quality of service, breadth of function and affordability.

Our consistent winning of awards across the globe helps validate to customers that we are the right choice to shortlist when comparing CRM systems and we are proud that our customers score our support and their likelihood to renew and recommend so highly." – John Cheney, CRO, Workbooks Online Limited.

WORK[etc]
Customer Relationship Management Software

Software Profile & Review Summary

WORK[etc] provides online CRM, project management, billing and help desk software as an all-in-one platform for businesses with 5 to 100 employees. The company launched the product in 2010 and although headquartered in Australia, has 70% of its customers in the U.S.

WORK[etc] customers include Creative Network, IronKap, Symturk Ltd, and Moore Engineering Services.

Company Status	Private
Customers	1,200
Employees (per LinkedIn)	13
Pricing	Starter: $78/month for 2 users Team: $195/month for 3 users Foundations: $395/month for 3 users Additional users $49/month
Best Fit For	» Small businesses » Professional services companies

WORK[etc] Customer Distribution
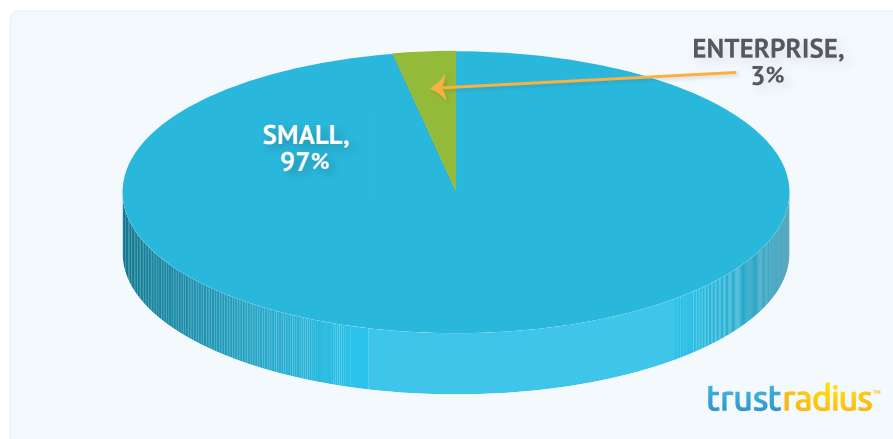
Source: (29) User reviews and ratings of WORK[etc] on TrustRadius

Aggregate User Ratings of WORK[etc] on TrustRadius

RATING ATTRIBUTE	WORK[ETC]	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	9.4	29	7.9
Likelihood to renew	9.5	24	8.3
Product usability	6.3	3	7.8
Product availability	10	1	9.7
Support	9.3	4	7.8
Online training	10	1	7.2
Implementation satisfaction	9.0	1	7.3

Source: (29) User reviews of WORK[etc] on TrustRadius

Summary of WORK[etc] Reviews

WORK[ETC] PROS	WORK[ETC] CONS
Google apps, email integration WORK[etc] integrates well with Google apps and email systems (Gmail, Outlook), allowing users to make updates directly from their inbox.	**Mobile app** WORK[etc] does offer a mobile app, but many users feel it could be improved, in terms of the design and the capabilities it offers. *Note: the company launched a new iOS app in Feb. 2015, and has a new Android app in beta.*
Customer support, innovation The customer support team is helpful and quick to respond. Also, the company listens to customer feedback and is consistently adding new features.	**Billing and invoicing** Some users say the billing and invoicing functionality could be improved, especially when it comes to subscription or recurring billing. Uses would also like to see additional or better integrations with accounting software such as Quickbooks and Freshbooks.
End-to-end tool, time management The software helps businesses with multiple processes, including time management, project management, client management, expense tracking, lead tracking, calendar management, support ticket management, quote creation, and knowledgebase creation. Users offer special praise for the timesheet and time management features, allowing companies to keep track of (and optimize) how much time is spent on specific tasks, clients or projects.	**Email marketing** Some users would like to see improved email marketing features, as well as integration with email marketing software products such as Mailchimp.
Ease of use WORK[etc] is easy to use and simple for new users to pick up.	
Reporting Some users really like the reports and dashboards offered in WORK[etc], especially the Gantt charts for time management. However, some users would like to see more flexibility in the reporting and to be able to build custom reports.	

Source: (29) User reviews of WORK[etc] on TrustRadius

Tips from WORK[etc] End-Users

> *"Evaluation lessons: Our problem was that the system we were looking for, WORKetc, was not around or in major use when we first began evaluating systems. In addition to reading reviews and demoing products, we had the luxury of asking our 50 sister centers around the country what they were using and how it was working for them. We learned that most struggled with the same issues that turned us off to major CRM players...too salesy, too dense, too complicated, poor support, too expensive, limited functionality."*

—William Mullane

Marketing Manager & Growth & Innovation Team at Boise State University - TechHelp Manufacturing Extension Partner

Feb. 2015

> *"WORKetc is well suited for any company with standard sales, support, and employee management work flows. It may not take the place of some of the other extremely large CRM packages out there but for midsize companies it seems to work very well for the expense."*

—David Jones

Director of Information Technology at Proficient Health

June 2014

> *"I strongly suggest that you test and compare other tools first. I spent 12 months looking for an affordable solution that had the features I wanted before starting with WORKetc 4 years ago."*

—John Belchamber

Founder at Dementia Journeys

Jan. 2014

> *"Go slow, start with the basics, become familiar with the interface and then carefully consider how to implement the solution to best serve your organization."*

—Mike Ramirez

President at TechGro

Dec. 2013

WORK[etc] Response to Reviewer Feedback

As of February 2015, WORK[etc] has its brand-new iOS app queued for release on the iTunes App Store. The new WORK[etc] app for Android has also officially entered the beta testing phase.

WORK[etc] is also currently developing a total overhaul of the web app that will enhance performance and productivity for larger businesses along with a second release of its integration with Xero and QuickBooks Online.

Zoho CRM
Customer Relationship Management Software

Software Profile & Review Summary

Zoho CRM is part of a suite of online business software applications offered by Zoho, including products for sales and marketing, customer support, finance and HR. Zoho Corporation was founded in 1996 and has offices in the U.S., India, China and Japan.

Zoho says its CRM customers span many industries, including marketing, technology, communication, customer support, website development, health care, transportation, real estate, life sciences, construction, entertainment, consulting, website design and service providers.

Company Status	Private
Customers	50,000
Employees (per LinkedIn)	2,562 (entire company)
Pricing	$12 to $50 per user per month
Best Fit For	» Mid-size companies

Zoho CRM Customer Distribution

ENTERPRISE, 3%
MID-SIZE, 31%
SMALL, 66%
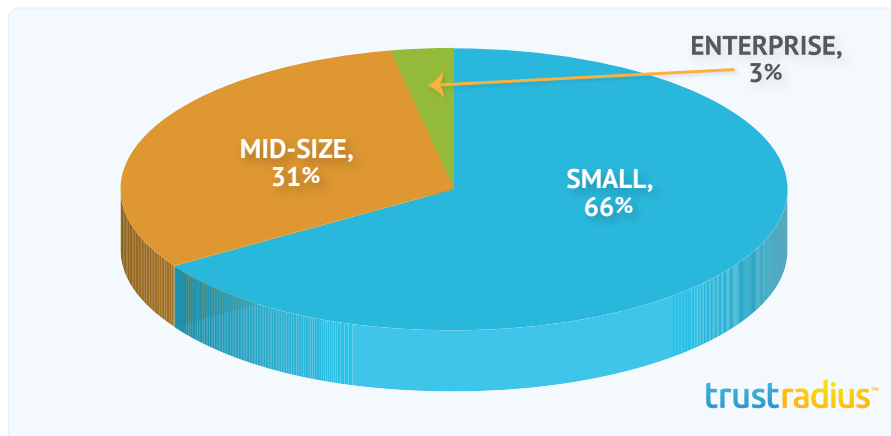
Source: (30) User reviews and ratings of Zoho CRM on TrustRadius

Aggregate User Ratings of Zoho CRM on TrustRadius

RATING ATTRIBUTE	ZOHO CRM	# OF REVIEWERS CONTRIBUTING TO RATING AVERAGE	CRM CATEGORY AVERAGE
Likelihood to recommend	7.5	26	7.9
Likelihood to renew	7.1	19	8.3
Product usability	8.0	2	7.8
Product availability	9.0	1	9.7
Product performance	9.0	1	9.5
Support	5.5	4	7.8
Online training	4.0	1	7.2
Implementation satisfaction	5.7	3	7.3

Source: (26) User reviews of Zoho CRM on TrustRadius

Summary of Zoho CRM Reviews

ZOHO CRM PROS	ZOHO CRM CONS
Ease of use Zoho CRM is intuitive and easy to use, even for technically challenged users.	**Email and other integrations** Users would like to see more or better-functioning syncing options with email (e.g., Outlook and Gmail), as well as other integrations such as accounting tools (e.g., Quickbooks) and social media networks.
Customizable The software can be customized based on your needs, with capabilities such as user views, advanced filtering, renaming and modifying fields, custom fields, and custom rules. However, some users don't like that there is a limit to the number of custom fields they can create.	**Complex workflows** While a great fit for small or simple businesses, Zoho CRM does not work well for companies who need to implement complex, custom or automated workflows.
Feature set Users like the following capabilities: territory management, lead assignment, form building and integration, inventory management, meetings and reminders, pipeline management and revenue goal setting.	**Automation** Users would like to see more automation options, including automated workflows, automated email notifications, and marketing automation options.
Integration with other Zoho apps Zoho CRM can be tightly integrated with other Zoho products.	
Price The product is affordable.	

Source: (26) User reviews of Zoho CRM on TrustRadius

Tips from Zoho CRM End-Users

"I think Zoho CRM is well suited for the SMB market because it can be implemented very quickly and provide value within the first month. The key questions to ask are more focused internally regarding the actual requirements of sales, marketing, support and management."

—James Lochran
Sales and Marketing consultant
Nov. 2014

"Although you can implement Zoho CRM yourself but the effort required in learning the application is demanding. Always choose a professional who has some sort of processes to define CRM scope before implementation."

—Usman Ghani
Zoho Administrator at Aimark Travers Inc
April 2014

"Useful advice for small groups implementing Zoho is don't integrate/turn on everything at once. Adoption by the users in manageable chunks will be easier in the long run."

—Joe Martinez
Marketing Specialist - Outbound Marketing Manager at Encon Safety Products, Inc.
Dec. 2013

Zoho CRM Response to Reviewer Feedback

Over the past decade, the Zoho suite has emerged to be a leader in the cloud and on your device. With the largest R&D team in the industry, we have made a commitment to offer our customers not only product depth but also a breadth of product offerings. As a customer, you get our devotion to customer satisfaction.

We designed Zoho CRM Plus to solve many issues sales and marketing teams have in regards to managing the customer lifecycle, marketing automation, managing sales pipelines and customer support. We wanted to provide a simple solution to give our customers the support they need to work efficiently, sell smarter and grow their business.

Our support team and partner network are available to provide solutions to the most complex workflow automation setups. We have a wide array of tools that give our customers the ability to go beyond Zoho CRM and build applications that are customized for specific business needs. Zoho CRM can be integrated with custom built and third party applications for seamless management of your marketing automation, email notifications and workflow processes.

In order to be included in this guide and in the TrustMap, a CRM software product must have at least 10 ratings and reviews on TrustRadius (many have many more). Given this requirement, the guide is not exhaustive. Some CRM software products are not included due to insufficient reviews. The next iteration of this guide will likely include more products, and we welcome feedback on any notable products we have missed here. Below is a brief summary of a few of the products we hope to include when we update this guide.

Nimble, 4.1 out of 5 stars

Nimble is a social CRM tool that focuses on helping sales and marketing people leverage social media when managing their customer relationships. The tool pulls in data from Facebook, Twitter and LinkedIn, among other social networks, and associates it with a contact record. It also tracks communication history with each contact and allows users to understand shared interests with contacts based on social data. The company was founded in 2009 and has raised about $3 million in funding. Pricing is $15 per month per user, according to Nimble's website.

According to reviews on TrustRadius, Nimble is easy to use. It's easy to filter and segment contacts, and understand shared interests. Users like the integration with other systems (e.g., HubSpot, Act-on, Mailchimp, Rapportive, Olark, and QuickBooks), and especially the integration with your email inbox. However, users would like to see an enhanced mobile app (currently just a subset of the tool's functionality), as well as better forecasting and other reporting functionality. One user says the tool can be an alternative to contact management software products such as Act! or Goldmine, or a supplement to CRM tools such as Salesforce.

Oracle CRM, 3.8 out of 5 stars

Oracle offers several CRM products, including both on-premise and SaaS solutions. According to the vendor, Oracle offers a Customer Experience (CX) portfolio of cloud capabilities, including Data as a Service, Marketing Cloud, Sales Cloud, Commerce Cloud, Service Cloud and Social Cloud. These products can be purchased individually or as an integrated suite. Oracle Siebel is an on-premise CRM suite that is part of the Oracle CX portfolio.

According to reviews on TrustRadius, Oracle CRM is very powerful and customizable, and relatively intuitive for the end user. However, there is not a lot of flexibility in the graphic user interface. Also, users would like to see customization options that did not require JavaScript and HTML.

Pipedrive, 4.7 out of 5 stars

Pipedrive is a sales pipeline tool for small businesses. It offers sales pipeline visualization, contact management, and sales forecasting. The company was founded in 2010 and has raised about $4 million in funding. Pricing is $12 per user per month, according to Pipedrive's website.

According to reviews on TrustRadius, Pipedrive is easy to use and offers great visualizations of deal flow, the sales pipeline, and progress toward goals. It's great for tracking communications with customers as well. However, users would like to see better integration with Gmail, easier customizations, and better Android and iPhone apps.

Velocify, 3.3 out of 5 stars

Velocify is a sales automation tool designed to help improve sales team productivity and shorten lead response times. The tool offers lead management, outbound dialing capabilities, and integration with Salesforce. The company was founded in 2004 and was originally called Leads360. It is based in California and has raised about $18 million in funding. Pricing is based on features and number of users; specific pricing information is unavailable on Velocify's website.

According to reviews on TrustRadius, Velocify is relatively easy to set up and use. Users especially like the built-in lead dialer, the lead distribution and prioritization features, the local caller ID, and the ability to create pre-recorded voicemail messages. However, users would like to see better canned reporting and reporting customization options, improved customer support, and easier integration with other software apps.

Marketing Automation Software

Another potential option for small to mid-sized businesses looking for CRM software is a marketing automation tool with a CRM component. There is somewhat of a convergence between these two categories of software, since many CRM software products offer basic marketing automation features, and some marketing automation tools are now adding CRM features.

Infusionsoft, for example, is a marketing automation and CRM tool focused on very small businesses (often with 1 to 10 employees). According to the company's Senior Director of Communications, all of their customers use the contact management features, and 50% use the sales automation features.

HubSpot is a marketing automation solution focused on small to mid-sized companies with 10 to 2,000 employees. The company recently launched a CRM, initially available only to HubSpot marketing automation users. Here is a TrustRadius interview with HubSpot's CMO about the strategy behind the new CRM tool.

Our Buyer's Guide to Marketing Automation Software contains a summary of the strengths and weaknesses of Infusionsoft and the strengths and weaknesses of HubSpot.

It's important to note that many companies with large databases of contacts or companies with sophisticated digital sales and marketing practices use standalone software products for CRM and marketing automation, often integrating the two. Therefore ease of integration can be an important factor when selecting CRM and marketing automation software.