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CRM Suite Software Product Directory

2009 EDITION

Microsoft

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Welcome!

Welcome to [SearchCRM.com](#)'s **CRM Suite Software Product Directory**. This directory was designed to be a valuable resource for those getting started with research or evaluating vendors in the CRM market.

Inside, you'll find basic information about the major vendors in the CRM suite market and the products they sell. Each listing is accompanied by a short description and a summary including limited information about functionality and product use. You'll find products for businesses of all sizes as well as products that can be deployed on-demand and on-premise. Use this list to get started with the evaluation process. For more information about any of the products or to speak to a sales representative, please visit the vendor website or product website.

[SearchCRM.com](#) will launch a series of directories throughout the year to address unique segments of the CRM market. Want to see your product listed in one of our directories? Go here to [submit a product](#). Need to update product or pricing information? [Email us here](#). For questions for the editors or to make suggestions for improving the directory, write to us at editor@searchcrm.com.

Happy shopping!

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Selecting a CRM software suite: An art and a science

ESPIE YEARS OF maturation and consolidation, the market for CRM software remains both healthy and diverse.

And while buyers of CRM systems have learned from the over-promising and under-delivering of past years by vendors, integrators and consultants (not to mention the horror stories of massive, multi-million-dollar CRM implementation failures), purchasing a CRM software suite remains complicated, expensive and potentially dangerous, not only to a company's bottom line but to its ever-important relationship with its customers.

The best practices for implementing and maintaining a CRM system have been widely reported: Get executive-level sponsorship, foster user adoption, be careful to monitor data quality, and treat the project as a strategic business initiative, not a chore for IT.

However, selecting, negotiating and ultimately completing that initial purchase demands a set of best practices of its own. In fact, many consultants and analysts agree that the initial business case for the project, if assembled carefully and comprehensively, can ensure the success and continued health of a company's CRM program.

ASSEMBLING THE TEAM

Once an organization has determined its interest in a CRM suite (whether on-premise software or an on-demand service) and found a senior executive from a line-of-business group to champion the project, it needs to form a selection team.

"One of the reasons to have a team is [that] when you implement, you do it by business scenarios," said Ray Wang, vice president of research with Cambridge, Mass.-based Forrester Research Inc. "It's easier to put together a team to talk about the business processes you want to support—say campaign-to-lead."

CRM buyers should have one functional process lead for each area of the business, Wang suggests. An organization with 100 employees or fewer will need the head of sales or head of marketing. An organization of 20,000 employees might need a team of 20 or 30.

The team can help determine whether or not to begin the CRM project in sales, service or marketing, and that's an important step. Gone are the days of "big bang" CRM implementations, of rolling out across all three functional areas at once. Gone, too, are the days of small, tactical deployments with no view of the long term. What's emerging is a new way of thinking about CRM.



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Five to seven years ago, companies were buying full CRM suites with complete sales, service and marketing functionality, oftentimes with disastrous results. That led to a backlash of sorts, with organizations taking more of a tactical, piecemeal approach. For example, a company may have looked to a small module or best-of-breed tool to get a handle on a sales division or automate an email marketing campaign. Now, companies are still thinking tactically but with an eye to the long-term strategic goals.

The team should therefore include not only a senior executive and representatives from IT but end users and those with a view of the business processes that will be automated. It should also include someone from finance. Once in place, the team can establish the business case.

BUILDING THE BUSINESS CASE

CRM is certainly not the only IT project that has been darkened by the specter of failure, according to Michael Smith, research vice president with Gartner Inc., a Stamford, Conn.-based analyst firm.

“Roughly 50% of all IT initiatives struggle to achieve their originally stated objective,” Smith told attendees at one of Gartner’s CRM summits. “Often, it’s not because of the technology. There’s a lack of understanding among common stakeholders about what the objectives are.”

There’s a direct correlation between taking the trouble to measure a CRM project’s success and whether it actually does succeed. Gartner research has found that companies that quantify and measure their CRM projects are more successful with their initiatives. According to a survey of 251 Gartner clients, the more measurement companies do, the more success they report. Of respondents that have created only a project plan, 50% reported a successful implementation; 60% of those that did an ROI analysis reported CRM success, and 70% that did a post-project review saw success.

Eight steps to building a business case

- ① Develop a CRM strategy to support your business strategy.
- ② Select business metrics to support your CRM strategy. You don't need hundreds; four to six will do.
- ③ Establish a baseline for these selected metrics before the project begins, and if possible, benchmark performance against industry peers.
- ④ Describe the desired capabilities and requirements of a CRM application.
- ⑤ Negotiate targeted improvements using the baseline metrics.
- ⑥ Convert the targeted improvements into financial results.
- ⑦ Develop the TCO.
- ⑧ Calculate the ROI.

Companies should plan on a 15-week window for building the business case, according to Smith.



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Therefore, establishing the business case for a CRM purchase and tracking progress along the way can help ensure that a company gets what it pays for from CRM. Gartner suggests an eight-step process for building a CRM business case.

DON'T SWEAT THE RFP

Organizations should not place too much faith in the request for proposal (RFP) process, Wang suggests. Often, an organization will send out a detailed RFP with 300 line items, and every vendor will respond saying, "We can do all of that."

"We try to help clients move out of the RFP process," Wang said. "We give clients Excel spreadsheets of how a vendor did well [in vendor rankings] and why. We don't assume we know what the best solution is for every customer."

There are plenty of sample templates around, and organizations can look to analyst firms for rankings like the Forrester Wave or the Gartner Magic Quadrant to supplement them.

Of greater importance, according to Wang, is getting vendor sales reps to demonstrate the product and to ask about changes or customizations during the presentation. This essentially makes vendor reps demonstrate and prove whether their system is as flexible and customizable as they claim.

"In the middle, you say: 'We had a change in plans or business model.' Have them re-route a territory," Wang said. "It's better than a spreadsheet. With the demo, they have to show that functionality. Scenarios and demos are very important."

That's another reason why it's important to have people on the team who can recognize and present realistic challenges during a vendor demonstration.

Naturally, seeing the product in action beyond just a demo is vital as well. On-demand or Software as a Service (SaaS) applications provide a simple test environment because they are run over the Web—so a handful of marketers or sales reps can try them out. Large, on-premise installations require a proof of concept or pilot test before any contracts are signed.

More and more frequently, the result of a well-planned business case is the selection of a full CRM suite rather than individual tools. For years, Forrester Research has been telling companies to base their CRM technology buying decisions on processes and business need, but a study that Forrester conducted found that once the decision has been made, firms are looking to suite or platform vendors.

"The subtlety here is [that] early on, a lot of people bought the technology first and didn't figure out what they were going to do with it," Forrester analyst Bill Band told SearchCRM.com. "Now, they've spent a lot of time on the business case and vision, but once they've done that, they tended to want to go to a platform."

It's important to have people on the team who can recognize and present realistic challenges during a vendor demonstration.



SERVICE PROVIDERS

Enterprise service providers (ESPs) or consultants can make or break a project. In its recent court filings, Shane Co., a bankrupt jewelry retailer, blamed its situation on a failed implementation of SAP. A subsequent statement placed the responsibility not on the software vendor but on Shane management and an unnamed system integration partner.

While ESPs can certainly make an implementation easier, organizations need to be careful how they use them, according to Gartner. Many respondents to Gartner's CRM survey said they overspent on ESPs and became over-dependent on them to implement the system and train staff.

"We suggest you do more training up front before you begin an implementation," Smith said. "Take people who are using the solution and get them trained. Rather than have the ESP do implementation work, have those people who are running it do the implementation, then backfill with people to do their jobs. At the end, you have people who are trained and understand how the system works."

NEGOTIATING THE CONTRACT

Just as CRM buyers need to be vigilant and collaborative when selecting an application that meets their business and IT goals, negotiating the contract also demands care.

It is with the initial contract that buyers have the most leverage. There are opportunities to get discounts and deals with upgrades, but winning those kinds of concessions proves much harder once a system is already in place.

"With contract negotiation, the key thing is to make use of flex-ups, flex-downs and to pay for maintenance upon deployment," Wang said.

With flex-ups, buyers need to protect the price point if they buy more licenses. Flex-downs are equally important. For example, a company that buys 1,000 licenses but winds up using only 500 won't want to pay maintenance and support on the full 1,000.

CRM software vendors, particularly those selling full suites, encourage bundled licensing by offering extra seats or modules beyond a company's immediate needs in exchange for a discount.

"We caution you against that," Gartner's Smith said. "Buy what you need for now. You never know down the road if you're going to want to look at an alternative."

With maintenance and support typically costing around 22% of license fees, after four years of paying maintenance for unused licenses that were thrown into a deal, companies have essentially paid for those licenses anyway.

Forrester offers a number of suggestions for companies writing out enterprise software contracts, including: a written definition of user and usage metrics; written documentation of how pricing is determined and how discounting price tiers are calculated; full disclosure of unknown defects and bugs that emerge and average time to resolve by the vendor; and an examination of vendor financial records such as financial performance, cash position and pending legal actions.

In addition, Forrester writes, beware of vendors adding costs when the purchaser



switches hardware, databases or operating systems. Buyers should be able to freely transfer software licenses regardless of hardware or site.

SAAS VS. ON-PREMISE CONSIDERATIONS

When it comes to SaaS CRM, hardware and site locations are not an issue, but there are some considerations buyers need to take into account. While most SaaS products are offered on a per-month, per-user basis, in reality, most vendors offer discounts for contracts of a year or longer. Forrester suggests seeking at least a 10% discount for contracts of a year or more.

Also, when comparing SaaS to on-premise, a fair comparison is not one year or two but a five- to seven-year period that reflects implementation, training, change management, upgrades, hardware and bandwidth. Some buyers find surprises with SaaS bandwidth, storage and additional module fees, according to Forrester.

Service-level agreements (SLAs) need to be monitored carefully as well. Most contracts with SaaS vendors will include refunds for outages, but Forrester recommends that companies include loss-of-business metrics.

“In SLAs, for downtime you typically get a month credit,” Wang said. “There’s a business impact that people should talk about. If you lost a million dollars of business, what does one month get you?”

Finally, while SaaS vendors typically face more stringent compliance, security, disaster recovery and backup requirements than their customers’ own IT shops, buyers should still demand proof via certifications or on-site data center evaluations, particularly if they are making large purchases.

CONCLUSION

Buying CRM suites requires time, money and effort, but the results for organizations can be well worthwhile. In fact, after the disappointments and failures of CRM’s early years, many companies are finding real, measurable ROI from their CRM projects either through increased sales, improved customer satisfaction and loyalty, or a reduction in the cost of serving customers.

For those negotiating the evaluation or purchasing process, SearchCRM.com is a valuable resource. Keep up to date with the CRM market with SearchCRM.com’s [industry news](#), or browse the [learning center](#) to find resources dedicated to helping you choose the right tools for your organization. Or, submit a question to our [dedicated team of experts](#), who can provide personalized advice to guide you through the process and help you find a product that meets your needs. If you’re looking for something we don’t have, please [contact the editors](#) and we’ll do the best we can to help.

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LEGEND

Vendor: Vendor/developer of product at directory press time

Product: Product name

● **SaaS or services:** technology available as SaaS, hosted, on-demand, ASP and Web Services

◆ **On-premise:** software or systems on premise

○ Descriptions were written by the SearchCRM.com editorial team based on information gathered from vendor websites.



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AMDOCS

Amdocs Customer Management

Amdocs Customer Management is designed to help organizations and their customers get more value out of each customer interaction. ♦

COMPANY WEBSITE: www.amdocs.com

FOUNDED: 1982

SUMMARY: Amdocs Customer Management links corporate objects, process initiatives and IT systems across the entire customer lifecycle, encompassing marketing, sales, service and support and business intelligence. Amdocs Customer Management includes a call center product that provides a script manager, billing manager and customer interaction manager, among other capabilities. The solution's smart agent desktop feature unifies call center agent desktops and provides context-sensitive advice to call center agents during calls. Additional capabilities include multi-channel self-service, real-time decision-making and sales and ordering. ◉

PRICING: Pricing is based on a combination of application and user licenses. It can range anywhere from hundreds of thousands of dollars to millions depending on the application and number and type of users. (Declined to provide additional pricing details.)

ARDEXUS

Ardexus Mode

Ardexus Mode is a Lotus Notes CRM software package designed for businesses of all sizes. ●♦

COMPANY WEBSITE: www.ardexus.com

FOUNDED: 1998

SUMMARY: Ardexus Mode provides sales and marketing functionality along with reporting and planning capabilities. The solution is tightly integrated with Lotus Notes email and calendar. The tool includes a built-in sales coaching tool which provides advice directly to the sales force based on their answers to specific questions about the opportunity. Marketing professionals can utilize the solution's campaign management capabilities and automated email functions. Ardexus Mode's "Planning Portal" allows users to track and manage key numbers in a single interface. Ardexus Mode is also available as a native BlackBerry application. The Web-based CRM solution, Ardexus WebMode, is also available. ◉

PRICING: Pricing varies depending on whether the CRM is purchased as a hosted solution or whether it is leased or purchased outright. License pricing is separate from training, implementation, customization and/or hosting charges where applicable. On-premise license pricing starts at \$687.50 per user. Specific pricing for individual products or services can be provided on request.



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AURAPORTAL

AuraPortal BPMS-CRM

Aura Portal BPMS-CRM is a user-designed system that features seamless integration of CRM and SRM functionality. ♦

COMPANY WEBSITE: www.auraportal.com

FOUNDED: 2002

SUMMARY: AuraPortal BPMS-CRM is an on-premise CRM solution. The product provides tools for three functional areas: marketing, supply chain management and global services. These areas carry out general business process management processes, but users can add additional processes as they see fit. AuraPortal BPMS-CRM offers pre-built systems tasks that carry out all automatable procedures but is otherwise based entirely on user-defined processes. The solution includes Web 2.0 capabilities, a customer service center system, marketing campaign management functionality and automated supply chain features.

PRICING:

All features in one pack:

Employee licenses:

- User 1 to 20: \$600 per user
- User 21 to 50: \$300 per user
- User 51 to 1,000: \$150 per user

External licenses: (Customers, etc.)

- Pack of 100 Licenses: \$1,500

AXONOM, INC.

Powertrak CRM

Powertrak CRM provides tailor-made business solutions and modules to organizations already using Microsoft CRM. ♦

COMPANY WEBSITE: www.axonom.com

FOUNDED: 1995

SUMMARY: Powertrak CRM provides organizations already using Microsoft Dynamics CRM with additional CRM functionality through Powertrak CRM add-on modules. Powertrak CRM modules are available to extend Microsoft Dynamics CRM capabilities in four core areas: marketing, event management, technical case management and the call center. Powertrak CRM's advanced modules can handle large volumes and greatly extend the capabilities of the Microsoft Dynamics CRM application. Powertrak CRM offers tailor-made solutions for financial services, wealth management, high-tech and non-profit organizations. ○

PRICING: Declined to provide pricing.



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CDC SOFTWARE

Pivotal CRM

Pivotal CRM offers industry-specific, out-of-the-box CRM software. ●◆

COMPANY WEBSITE: www.cdcsoftware.com

FOUNDED: N/A

SUMMARY: Pivotal CRM offers industry-specific CRM solutions designed for financial services, healthcare, legal services, home building and real estate, manufacturing and medical device manufacturing companies. Pivotal CRM includes sales force automation (SFA), marketing automation, service automation, partner management and analytics functionality. The solution includes built-in, industry-specific best practices that address key business processes and provide users with a certain level of customization from the start. Pivotal Mobile CRM solutions are also available and can be deployed based on the organization's need. Pivotal CRM is also available as a hosted or on-demand solution. ○

PRICING: Declined to provide pricing.

CDC SOFTWARE

Saratoga CRM

Saratoga CRM is a full-featured product that is designed specifically for the world's largest enterprises and companies planning to grow significantly. ◆

COMPANY WEBSITE: www.saratogasystems.com

FOUNDED: N/A

SUMMARY: Saratoga CRM streamlines and automates sales, marketing and customer support processes. The product integrates with other enterprise systems and can be adapted to the needs of the organization. Saratoga CRM gives marketing professionals the ability to design, execute, manage and track basic and complex marketing campaigns. The product allows all of an organization's customer service, sales and call centers to access and share complete customer data, including contact history, order status and customer profiles. Saratoga CRM's flexible architecture and user interface allow users to create and customize their own reports and change the system based on business needs. Saratoga CRM's "Apresta" wireless tool allows users to access enterprise and CRM data from wireless devices. ○

PRICING: Declined to provide pricing.



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CLEAR C2, INC.

C2CRM

C2CRM is a browser-based CRM solution designed specifically for the midmarket. ●◆

COMPANY WEBSITE: www.c2crm.com

FOUNDED: 1993

SUMMARY: C2CRM consists of 30 modules within six solution sets: relationship management, sales management, marketing management, customer service, analytics and knowledge management and utilities. C2CRM's relationship tracking module provides users with detailed customer information, while the sales management product provides quote and proposal generation and an opportunities and forecasting system, which allows users to track revenue and close probability. C2CRM's customer service product tracks post-sales activities, billing and field service activity. Marketing promotions are automated and personalized with C2CRM's marketing management tool. C2CRM also offers a Software as a Service (SaaS) solution. ○

PRICING: Pricing for C2CRM starts at \$400 per user for on-premise and \$25 per user per month for the SaaS offering.

CONSONA CRM

Consona Customer Management

Consona Customer Management provides a comprehensive and flexible CRM on-site solution for the enterprise. ◆

COMPANY WEBSITE: www.consona.com

FOUNDED: 1994

SUMMARY: Consona Customer Management helps sales, marketing, service and support organizations capture, share and automate customer data and processes across the organization. The product offers an integrated suite of customer data management, process management and business intelligence products. Consona Customer Management captures and centralizes any customer information, then leverages it along with data from other systems. Consona Customer Management analyzes the results and adjusts to improve efficiency or capitalize on new opportunities to better the customer experience and achieve higher levels of performance throughout the organization. ○

PRICING: Based on a sample size of 100 users, the list price of the Consona Customer Management Suite is \$1750 per named user. This includes core CRM functionality (sales, service, support and marketing), operational reporting and workflow management tools. Specialized suite enhancements may be purchased and can include Handheld and CTI solutions.



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FIRSTWAVE TECHNOLOGIES

FirstWave CRM

FirstWave CRM manages the sales life cycle with lead generation tools and ad tracking capabilities. ●◆

COMPANY WEBSITE: www.firstwave.net

FOUNDED: 1984

SUMMARY: FirstWave CRM offers lead generation and sales life cycle solutions that can be deployed together or separately depending on an organization's needs. FirstWave CRM combines four lead generation solutions and six sales life cycle solutions. FirstWave CRM's "WavEmails" feature allows the user to send out email campaigns to thousands of contacts through FirstWave servers and domains. The product's "Adtracker" solution allows the user to identify all leads coming from online and offline marketing campaigns in a single dashboard. Managing the sales life cycle, FirstWave CRM's marketing, sales and customer modules give users the ability to manage and track marketing campaigns, sales activities and customer interactions. FirstWave CRM is also available as a hosted solution. ○

PRICING: FirstWave CRM costs an average of \$65 per user per month.

FRONTRANGE SOLUTIONS

GoldMine CRM

GoldMine CRM products are made to fit businesses of all sizes. ◆

COMPANY WEBSITE: www.goldmine.com

FOUNDED: 1989

SUMMARY: GoldMine CRM makes four products designed for specific business sizes. GoldMine Enterprise provides advanced relationship management, sales management, marketing automation and customer support functionality for the midmarket and large enterprises. The product integrates with key Microsoft technologies and many third-party applications. GoldMine Premium for the midmarket offers users advanced customer service and support capabilities, a standards-based, intuitive interface and statistical and graphical analysis of reports. GoldMine's Corporate Edition is designed for small businesses that don't need advanced service and support capabilities. The product provides users with flexible integration capabilities. GoldMine Standard is designed for individuals and small teams who want only the most necessary CRM features such as reporting and forecasting. ○

PRICING: Declined to provide pricing.



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INFOR

Infor CRM Epiphany

Infor CRM Epiphany combines integrated marketing, sales and service solutions and is based on Infor's Service Oriented Architecture (SOA). ♦

COMPANY WEBSITE: www.infor.com

FOUNDED: 2001/2002

SUMMARY: Infor CRM Epiphany provides a 360-degree view of the customer based on real-time information. Infor CRM Epiphany's marketing solution creates real-time customer profiles and allows managers to identify situations as customer interactions take place. The product's sales force automation capability manages the entire sales cycle and includes lead routing and call scripting. Sales reps can access the system through available mobile solutions. The product also serves as the foundation for call center operations and provides customer service professionals and call center agents with real-time analytics and a unified view of the customer. ○

PRICING: Declined to provide pricing.

MAXIMIZER SOFTWARE

Maximizer CRM

Maximizer CRM is a simple and accessible CRM system designed for small and medium-sized businesses (SMBs). ♦

COMPANY WEBSITE: www.maximizer.com

FOUNDED: 2002

SUMMARY: Built on a Web-based architecture, Maximizer CRM offers sales, marketing and customer service professionals access to customer information through their desktop, Web, or mobile devices. Maximizer CRM integrates with Microsoft Office and Microsoft Outlook and provides time and task management and accounting integration. The product features a built-in email campaign engine that allows organizations to generate more targeted leads. Customer service incidents, resources and frontline staff can be tracked and managed and critical business processes can be automated through the solution's workflow automation capability. Additional features include reports and dashboards and sales force automation tools.

PRICING: Maximizer CRM is available in four editions: Entrepreneur, Group, Professional and Enterprise. Pricing starts at \$229 for the Entrepreneur Edition.



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MICROSOFT

Microsoft Dynamics CRM

Microsoft Dynamics CRM is an integrated CRM system that is designed to enhance a company's sales, marketing and customer service processes. ●◆

COMPANY WEBSITE: www.microsoft.com

FOUNDED: 1975

SUMMARY: Microsoft Dynamics CRM allows users to create, manage and track customer interactions. The solution's marketing capabilities allow marketing professionals to plan campaigns and extract, analyze and report on data. The product's sales functionality gives sales managers the ability to forecast and analyze sales revenues. Customer service professionals can make use of knowledge-based management capabilities. The product also offers a multi-lingual user interface and integrates with key Microsoft products and technologies. Microsoft also offers an on-demand version called Microsoft CRM Online. ○

PRICING: Microsoft Dynamics CRM (server-based) can ballpark anywhere from \$1,000-\$2,000 per named user. This is the one-time cost of the software alone. Any implementation, customization, training, support and required hardware would also have a cost associated.

Microsoft CRM Online costs around \$40-\$60 per user per month. For more information, visit the Microsoft dynamics "how to buy" page: www.microsoft.com/dynamics/purchase/default.msp

NETSUITE

NetSuite CRM+

NetSuite CRM+ combines sales force automation (SFA), marketing automation and customer service and support to provide complete customer life cycle management. ●

COMPANY WEBSITE: www.netsuite.com

FOUNDED: 1998

SUMMARY: NetSuite CRM+ is designed to provide users with a complete picture of all customer data and customer interactions. The product's real-time dashboard integrates data cross all business departments, providing all employees with up-to-date intelligence. NetSuite CRM+'s customer service and support features includes a knowledge base and online customer self-service and support. Marketing professionals can utilize key marketing automation features such as email marketing and campaign tracking. The product also offers a variety of productivity tools such as group calendaring and customizable reporting. NetSuite CRM+ integrates with Microsoft Office applications. NetSuite CRM+ is a hosted, Web-based CRM system. ○

PRICING: NetSuite CRM+ is \$129 per user per month.



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ONCONTACT SOFTWARE

Oncontact CRM

Oncontact CRM automates key sales, marketing and customer service processes. ●◆

COMPANY WEBSITE: www.oncontact.com

FOUNDED: 1991

SUMMARY: Oncontact CRM is an out-of-the-box CRM solution that comes with a customization toolkit, allowing users to modify the application to meet their specific business needs. The solution's sales, marketing and customer service capabilities aim to give users a 360-degree view of the entire organization and its customers. The Oncontact Wireless solution allows users to access the Oncontact CRM application at any-time, from anywhere. Oncontact CRM's hosted solution, Oncontact SaaS, provides organizations with all the functionality of Oncontact CRM over the Internet. ○

PRICING: Oncontact CRM pricing starts at \$1295 per user.

OPTIMA TECHNOLOGIES

ExSellen

Optima ExSellen provides CRM functionality that can be customized and adapted to meet each organization's specific needs. ●◆

COMPANY WEBSITE: www.optima-tech.com

FOUNDED: 1989

SUMMARY: Optima ExSellen offers a set of sales, marketing, customer service and management tools that integrate with legacy and third party applications. The product provides a variety of sales force automation capabilities and marketing automation components. The tool sets up role-based workflow for call center agents and provides management for help desk and service tickets. Optima ExSellen is also available as a hosted solution. ○

PRICING: All prices include set-up assistance, installation, training, and first year maintenance and support. Price includes all available Optima modules for CRM including sales, services, marketing and BI.

- \$5,000.00 minimum set-up and installation charge; 5 or less users: \$1,000 per seat; 15 plus users: \$800 per seat; 20 plus users: \$500 per seat
- *Application service provider prices:* Average one time set-up fee is \$5,000; 5 or less users: \$128 per month per seat; 15 plus users: \$110 per month per seat; 20 plus users: \$84 per month per seat



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ORACLE

PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM offers products that are tailored to fit unique industry business processes and customer strategies. ♦

COMPANY WEBSITE: www.oracle.com

FOUNDED: 1977

SUMMARY: PeopleSoft Enterprise CRM delivers built-in best practices specific to the organization's industry in a configurable, integrated platform. Within the solution, users can plan and execute differentiated customer strategies and take action across all channels. PeopleSoft Enterprise CRM provides insight into business performance and organizations can use the tool to design a comprehensive customer strategy. Managers can set value targets for each customer segment and track ongoing performance in real time. ◉

PRICING: Component pricing starts at \$750 and goes up to \$11,995 depending on the component per application user. For additional details, see the full price list: www.oracle.com/corporate/pricing/peoplesoft-price-list.pdf

ORACLE

Siebel CRM

Siebel CRM product provides tailored industry solutions and comprehensive CRM capabilities. ♦

COMPANY WEBSITE: www.oracle.com

FOUNDED: 1977

SUMMARY: Siebel CRM provides sales, service, call center, marketing, customer order management and customer mastering capabilities tailored to more than 20 industries. Siebel CRM's task-based user interface allows users to create their own work sequences through a codeless process designer. The product's business rules engine allows users to configure business processes in real time without IT coding or complex scripting. Siebel CRM's additional capabilities include customer data integration, quote and order capture, self-service and e-billing and partner relationship management. Oracle CRM is also available on-demand.

PRICING: Siebel CRM Base is \$3,250 per application user. See the full pricing list: <http://www.oracle.com/corporate/pricing/siebel-price-list.pdf>



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ORACLE

Oracle E-Business Suite CRM

Oracle E-Business Suite is a set of applications that provide information-driven sales, service, and marketing functionality. ♦

COMPANY WEBSITE: www.oracle.com

FOUNDED: 1977

SUMMARY: Oracle E-Business Suite is a set of fully-integrated applications that gives the user information-driven sales force automation, customer service and marketing functionality. Oracle E-Business Suite is built on an open, standards-based architecture that aims to streamline business processes, improve data quality and allow all key divisions of the enterprise to draw from the same source of data. The product's functionality includes measuring marketing campaigns to automatically dispatch field technicians to remote locations. ◉

PRICING: Licensing for marketing is \$4,995 and \$1098.90 for support per application user. For additional details, see the full price list: <http://www.oracle.com/corporate/pricing/applications-price-list.pdf>

RELAVIS

Relavis Complete

Relavis Complete offers traditional CRM capability, but it is built exclusively for IBM Lotus Notes and Domino. ♦

COMPANY WEBSITE: www.relavis.com

FOUNDED: 1985

SUMMARY: Relavis Complete is accessible from the user's desktop, the Web and mobile devices. The product offers tight integration with the Lotus Notes platform; users can personalize the interface to suite their needs. Relavis Complete's "eSales" tool provides a configurable interface, is integrated with email and calendar and has built-in workflow and configurable processes. The eMarketing tool helps users create targeted, customizable marketing initiatives and track results. Relavis Complete's "eService" offering routes all customer interactions by priority and skill set via phone, fax or email. The knowledge base brings information to call center agents in real time. ◉

PRICING: Declined to provide pricing.



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RIGHTNOW TECHNOLOGIES

RightNow CRM Suite

RightNow CRM Suite is designed to help users consistently anticipate, manage and respond to their customer's needs. ●

COMPANY WEBSITE: www.rightnow.com

FOUNDED: 1997

SUMMARY: The RightNow CRM Suite is on-demand CRM software composed of three applications: RightNow Service, RightNow Marketing and RightNow Sales. Customers can choose which application to start with or deploy the entire suite. RightNow service provides users with self-service via the Web or the phone. RightNow's marketing automation application captures all customer interactions and includes email marketing campaign software. RightNow Sales provides built-in and configurable tools that help with sales lead management, territory management and forecasting. All three applications integrate seamlessly with one another and can be integrated with other modules such as feedback management, live chat and analytics. ○

PRICING: RightNow CRM Suite's per seat pricing begins at \$100 per user per month with a one-year subscription.

SAGE SOFTWARE

SageCRM

SageCRM provides sales force automation (SFA), customer service and support and marketing capabilities. ●◆

COMPANY WEBSITE: www.sagesoftware.com

FOUNDED: 1976

SUMMARY: SageCRM delivers a customizable suite of sales, marketing and customer support capabilities through a Web-based architecture. SageCRM also includes a remote data synchronization client and support for wireless devices. The product offers out-of-the-box integration with Sage ERP applications. SageCRM's features include sales automation tools, marketing campaign management, customer service tools, back-office application integration and Microsoft Outlook integration. SageCRM is also available as an on-demand solution.

PRICING: SageCRM pricing begins at \$595 per on-premise user license, and is also available as a hosted service for \$69 per user per month. For more details, visit www.sagecrmsolutions.com or call (800) 643-6400.



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SAGE SOFTWARE

Sage SalesLogix

Sage SalesLogix is a CRM product that includes sales automation, marketing, customer service, support and mobile automation capabilities. ♦

COMPANY WEBSITE: www.sagesoftware.com

FOUNDED: 1976

SUMMARY: Sage SalesLogix is a customizable multi-client CRM product that provides users with sales force automation (SFA), customer service and support and marketing capabilities. Deployment options include an on-premise desktop client, Web client, and an optional Sage SalesLogix Mobile client for BlackBerry, Windows Mobile or Smartphone devices. The product automates key aspects of the sales cycle and gives managers detailed visibility into the sales pipeline. Sage SalesLogix provides configurable dashboards that analyze performance metrics across the entire organization in real-time. Additional features include Microsoft Outlook integration, business alerts and customer self-service solutions.

PRICING: Pricing for Sage SalesLogix v7.2 begins at \$795 per user license, and pricing for Sage SalesLogix Mobile v5 begins at \$295 per user license. For more details, visit www.sagecrmsolutions.com or call (800) 643-6400.

SALESFORCE.COM

Salesforce On-Demand CRM

Salesforce On-Demand CRM runs on Salesforce's multi-tenant Force.com platform and is appropriate for businesses of all sizes. ●

COMPANY WEBSITE: www.salesforce.com

FOUNDED: 1999

SUMMARY: Salesforce On-Demand CRM includes sales force automation (SFA), customer service functionality, partner relationship management, marketing tools and a variety of other features. Salesforce uses Web 2.0 technology in its customer self-service application and business content feature. Salesforce On-Demand CRM's analytics tools give users access to real-time reporting, calculations and dashboards, providing insight into key business processes and data. Salesforce.com's "AppExchange" lets users browse, sample and select hundreds of applications that are all pre-integrated with Salesforce. The product is also integrated with Salesforce.com's "Ideas forum," where users can post their ideas, vote on ideas they like and discuss ideas with the community. Salesforce On-Demand CRM is an on-demand CRM product. ○

PRICING: Declined to provide pricing.



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SALESPAGE

SalesPage CRM

SalesPage CRM documents entire customer lifecycles in a single, consolidated solution. ♦

COMPANY WEBSITE: www.salespage.com

FOUNDED: 1983

SUMMARY: SalesPage CRM includes tools for marketing automation, sales management, customer service and support and reporting and analytics. SalesPage CRM provides multiple methods for extracting and analyzing data, from simple search tools to expansive query tools and reporting capabilities. SalesPage CRM gives customer service managers access to product and order information and the ability to manage internal and external projects. The product's sales management capabilities include territory management and opportunity management. Marketing professionals can develop and manage target customer lists, analyze campaign metrics and utilize call scripting technology. ◉

PRICING: A SalesPage CRM implementation consists of three components. Pricing is determined based on:

- *Software:* One-time fee based on volume of concurrent users, list price starting at \$1400 per concurrent seat.
- *Professional Services:* Requirements and planning, configuration, customization, data conversion, system integration, deployment, training and documentation.
- *Support & Maintenance:* 17% of listprice of software licenses. Information as of Q1 2009.

SALESPLACE

Salesplace CRM

Salesplace CRM is built on the IBM Lotus collaborative platform and is designed specifically for Lotus Notes and BlackBerry. ●♦

COMPANY WEBSITE: www.salesplace.com

FOUNDED: 1994

SUMMARY: Salesplace CRM has four modules; sales, marketing, customer service and mobility. These modules can be purchased as a full package or individually based on need. Salesplace CRM's sales tools manage activities, communications, leads, opportunities, accounts, forecasts and quotes, aiming to shorten the sales cycle, increase close rates and, ultimately, improve customer retention. The marketing module allows managers to track, manage and analyze leads, campaigns and ROI reports. The customer service module gives users control of assignments, notifications and performance metrics. Salesplace CRM's mobility module allows users to access the system online and offline via Web, BlackBerry or PDA. salesNOW CRM is available as a hosted solution. ◉

PRICING:

Salesplace CRM's user license costs \$300-\$850 per user. A server license costs \$5,000. salesNOW CRM is \$25 per user per month.



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SAP

SAP Business All in One

SAP Business All-in-One is a CRM product designed specifically for small and medium-sized businesses (SMBs). ♦

COMPANY WEBSITE: www.sap.com

FOUNDED: 1972

SUMMARY: SAP Business All-in-One is an on-premise solution designed specifically for small and medium-sized businesses (SMBs), allowing them to streamline their processes and get complete visibility across their entire organization. The solution is configurable and flexible and can be adapted to meet the changing needs of SMBs as they grow. SAP's "Qualified Partner Solutions" lets businesses choose a product based on industry-specific requirements provides by SAP channel partners around the world. The "Fast-Start Program" allows businesses to configure their product online and receive an immediate cost estimate. ○

PRICING: As solution requirements and partner add-ons vary by customer needs, there are no standard price configurations for SAP Business All-in-One. (Declined to provide additional pricing details.)

SAP

SAP CRM

SAP CRM provides functionality for marketing, sales and customer service, supporting customer-facing business processes across multiple interaction channels. ●♦

COMPANY WEBSITE: www.sap.com

FOUNDED: 1972

SUMMARY: SAP CRM helps users address marketing, sales and customer service situations by supporting a wide range of business processes. The solution aims to improve front-office efficiency and effectiveness and streamline critical business processes. The product includes a Web-based, role-oriented user interface that can be personalized and configured. This interface can be accessed by users at anytime from anywhere. It also provides an IP-based call center solution that includes call queuing and routing capabilities. SAP CRM's real-time offer management feature makes real-time recommendations to call center agents based on customer information, session information and agent skills. The product can be configured based on the organization's needs. SAP CRM is also offered on-demand.

PRICING: There is no standard pricing for SAP CRM because the scope and business requirements or each customer's implementation varies. (Declined to provide additional pricing details.)



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STAYINFRONT

StayinFront CRM

StayinFront CRM aims to provide a single CRM platform where all points of the customer interaction can be managed. ♦

COMPANY WEBSITE: www.stayinfront.com

FOUNDED: 2000

SUMMARY: StayinFront CRM provides sales, marketing and customer support functionality across multiple industries, specifically life science companies, consumer goods providers and business organizations. The solution can be deployed across multiple platforms without recreating functionality for each individual platform. StayinFront CRM can be delivered using Microsoft's "Smart Client" technology, which allows users to access the system over the Internet through a desktop-like user interface. StayinFront CRM can be further enhanced with a variety of add-on modules such as key account management, knowledge management and opportunity management. ○

PRICING: Declined to provide pricing.

SUGARCRM

SugarCRM

SugarCRM is an open-source CRM solution that offers flexible deployment options, including on-demand, appliance and on-premise. ●♦

COMPANY WEBSITE: www.sugarcrm.com

FOUNDED: 2004

SUMMARY: SugarCRM includes sales force automation (SFA), marketing automation, customer support and reporting capabilities. SugarCRM's sales tools allow sales professionals to forecast future revenues and monitor sales team performance through dashboards. Marketing automation capabilities help users create, execute and track marketing campaigns and email marketing programs. SugarCRM's "Customer Self-Service Portal" is designed to help companies reduce costs and improve customer service. SugarCRM is integrated with Microsoft Outlook and also available as a mobile tool. SugarCRM is also available on demand. ○

PRICING:

- Sugar Professional On-Site is \$275 per user per year
- Sugar Professional On-Demand is \$40 per user per month
- Sugar Professional FastStack is \$499 per production deployment
- Sugar Enterprise On-Site is \$449 per user per year
- Sugar Enterprise On-Demand is \$75 per user per month
- Sugar Enterprise FastStack is \$449 per user per year



UPDATE AG

update.seven STRIKE

update.seven STRIKE provides customer service support and management functionality to office and mobile workers. ●◆

COMPANY WEBSITE: www.update.com

FOUNDED: 1988

SUMMARY: update.seven STRIKE is a customizable customer service support and management solution for call center and help desk environments. The solution's user interface features color-coded icons, highlighting and drag-and-drop capabilities. update.seven STRIKE includes service management, efficiency and communication capabilities with features such as PDF creation, contact management and indirect task escalation. The solution integrates specifically with SAP business solutions. update.seven STRIKE is available on-demand and via PDA and Smartphone.

PRICING: Declined to provide pricing.

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