

Customer Relationship Management Buyer's Guide: Innovations in CRM



This is an abridged version of TEC's 2011 CRM Buyer's Guide.
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CUSTOMER RELATIONSHIP MANAGEMENT: A BUYER'S GUIDE



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Preface

The Forgotten “R” in CRM

Once, when a deal sounded too good to be true, we used to wait for the catch. Now, thanks to customer relationship management (CRM), we wait for the upsell.

Though CRM has the potential to do so much more, many organizations have focused on deploying CRM solutions as a way to wring a few extra dollars out of those with whom they already do business. You can’t blame them. With one recession seeming to follow another every few years, the old adage that it’s easier to keep an old customer than find a new one has never been so true. Besides upselling, CRM has also been used to facilitate a lot of cross-selling, particularly in organizations so large that the left hand doesn’t know what the right hand is selling, or to whom. But this is an impoverished way of thinking about CRM, and over time I suspect the best and brightest chief information officers (CIOs) will approach it differently.

When deployed properly, CRM gives enterprises not only an insight into the opportunities to grow business with each customer, but a way of measuring their value. Though we tend to think of them en masse, not all customers are created equal. Some are a drain on customer service resources despite spending very little. Other customers do business frequently, adopt new products and services, and may even be strong influencers to their peers. Sales and marketing efforts toward the latter group can be prioritized accordingly. As the available data aggregates, CRM should also provide companies with a way of better understanding customer needs and wants in order to improve their portfolio and the way it is offered to customers. Much more than a contact database, CRM should be an engine that drives customer trust.

For many years, the term CRM was interchangeable with the word “failure.” I remember writing about some of the early products in the late 1990s, when whole conferences were dedicated to the subject. Analysts and consultants would shake their heads over statistics that anywhere from 70 to 90 percent of all CRM deployment projects ended badly. Though the same could probably be said about any new technology, including enterprise resource planning and business intelligence solutions, CRM systems seemed particularly disaster-prone. Implementation failure was often attributed to “communication problems,” but

among CIOs I know, the cause is straightforward: sales people just don't want to use the software. Either they have gotten used to a legacy sales order system and are put off by the need to key in more data, or they simply shy away from offering customer information that could benefit someone other than themselves. I'm generalizing, of course, but there's no doubt that CRM systems' ability to create a common knowledge base for all customer information has had the most disruptive effect on organizations.

A few vendors, most notably Salesforce.com and Siebel (now part of Oracle) managed to gain significant headway in the CRM space in the early 2000s and became pioneers in what we now call software as a service (SaaS). Since then, many others have entered the fray, notably Microsoft (which built up its Dynamics CRM line through strategic acquisitions) and SugarCRM, among others. As this buyer's guide will demonstrate, there is plenty of choice for CIOs and information technology (IT) managers available today.

Leading organizations will also use CRM as the catalyst for more sophisticated information management programs. For example, customer data is among the pillars for establishing a master data management (MDM) strategy that integrates CRM with business intelligence software and connects to data warehouses.

Even among mature CRM users, however, there can be significant disagreement over how to define "customer." For one person it may be someone who has bought a product in the past but has since been dormant. For another it might refer only to active accounts. Still others may count business-to-business (B2B) transactions as customer relationships and discard business-to-consumer (B2C) activity. Sorting out the parameters is key to making CRM, or any initiative associated with it, successful.

We used to say that the goal of CRM was to establish a "single version of the truth" out of the widely diverging information housed in various departmental systems. Here's the real truth: it's the customer relationships, not just the customer data, that is the real gold in any organization. Use CRM products to nurture those relationships properly, and the cross-selling, upselling, or any other selling will take care of itself.

Shane Schick
Editor-in-Chief
IT World Canada
November 2011

CRM: A BUYER'S GUIDE

The challenge for companies selecting customer relationship management (CRM) software is that there is a plethora of options—"best-of-breed" solutions, software for verticals, add-ons, and solutions delivered on premise, on demand, or by subscription (software as a service [SaaS]). The best way to navigate a market of so many products to find the right solution for your organization is to understand how they differ from one another. And since many CRM vendors offer similar functionality, innovation is the factor that sets the leaders apart.

This buyer's guide will show what CRM vendors are doing to differentiate themselves from the competition through innovation. We will first describe some of the major innovations in the CRM space (e.g., cloud computing, social media and collaboration tools, mobile technology, and extended functionality), and then review their advantages and disadvantages. For each category of innovation, the guide will illustrate with real-life examples how CRM vendors provide innovative solutions to their customers and the associated benefits.

Innovation in the CRM world can be approached from two main perspectives: innovations in software, which affect the way companies manage their relationships with their customers (e.g., the ability to analyze customer feedback, for better customer service and even product development), and innovations in the market, which affect the accessibility and usability of CRM solutions (e.g., having CRM functionality available in the cloud or on a mobile device). And as the two qualities are interconnected (innovation in one arena generally leads or responds to innovation in the other), this guide focuses equally on innovations in CRM software and in new delivery models, such as cloud computing and mobile.

Throughout this guide, we consider CRM to be more than a set of tools and solutions that companies use to facilitate their interactions with customers. A complete CRM implementation includes strategies and best practices that companies define and apply in order to attract and retain customers.

CRM INNOVATIONS

CRM innovations can be classified into four major categories: cloud computing, mobile, social, and extended functionality. Each category uses different technologies to address the needs of customer-focused companies and respond to changes in customer behavior. Many vendors innovate in two or more of these categories; others focus on one category (e.g., some traditional CRM vendors do not yet offer a cloud-computing delivery model or social functionality, but they have created strong mobile versions of their solutions).

Most of the innovative initiatives in the CRM space are contained within these four categories (but innovations are by no means limited to these categories). We consider these categories to be of the utmost importance—and this guide will focus on them—because they greatly affect the way companies manage their relationships with customers (existing or potential).

CRM IN THE CLOUD

Cloud computing is an option vendors offer customers to store business data and information technology (IT) infrastructure outside the company's premises using the vendor's system. No or very little hardware is required for the company to use the system, and end users need only a Web browser and an Internet connection to access all the functionalities they need. Vendors handle the hosting via servers located on their premises, data centers operated by third-party companies they have agreements with, or a combination of both.

Vendors may offer customers a single-tenant model, with a dedicated database, which is separate from those of other customers, or a multitenant model, with a database shared by all the vendor's customers.

CRM vendors and their customers were the first to embrace SaaS, leading to a very high concentration of SaaS offerings in the CRM space compared with other segments of the business software market. This is owing to the relatively simple business model for CRM, compared with enterprise resource planning (ERP) or product lifecycle management (PLM), for example, which makes it easier to be deployed in the cloud. Even when managing thousands of customers and prospects, marketing campaigns, and knowledge bases for customer service, CRM systems do not reach the level of complexity of ERP or PLM systems, which need to manage thousands of products with hundreds of thousands of components and production cycles for millions of units of finished goods. In addition, CRM systems do not require heavy customization. Most changes needed are less complex than those associated with, for example, production or inventory management, and are thus easier to address and manage through a cloud application.

Cloud computing allows sales and marketing people to focus on what they do best: search, attract, and keep customers, while reducing or eliminating activities such as maintaining an IT infrastructure. Companies focusing on sales, for example, tend to keep their IT infrastructure costs to a minimum, and a SaaS offering can be an attractive option for them. But even companies with IT departments sometimes opt for SaaS CRM solutions, rather than managing the software and supporting hardware internally. Below, I discuss some of the main reasons for this, as well as some of the challenges facing companies looking at SaaS CRM solutions.

PROS AND CONS OF CLOUD COMPUTING FOR CRM

When evaluating the cloud for CRM solutions, companies should weigh the pros and cons to ensure the cloud-based option can satisfy their specific needs.

One of the most important advantages of cloud computing is that the application can be **accessed from anywhere in the world**, as long as there is an Internet connection available. It is important for people on the move to be able to access the solution wherever they are without any effort from the company using it—all they should need to do is open a browser and access a secured hyperlink. A possible drawback is reduced security of the connection to the database and weaker encryption of the data transmitted back and forth. In addition, local and regional rules and regulations might not allow companies to use online systems for storing and manipulating customer data, which can limit the reach of cloud-computing systems for CRM.

The **reduced IT cost for cloud CRM** is another advantage, as the solution is not installed and administrated by the customer. Though internal IT costs can be dramatically reduced, customers still have to pay for IT-related services that are not included in the core package. For instance, connectors with ERP systems may not always be included, and backing up data and importing legacy data might also generate extra costs. Also, the cost of ongoing service of the cloud CRM option may be substantial over the long term.

The **accelerated delivery of new features** is another obvious advantage, as new functionality can be available immediately to users, eliminating the need for upgrades and patches that are traditionally installed on top of the core product, usually disrupting the activity of the company. As a downside, cloud-based options are associated with a limited degree of personalization and no customization (except when the vendor offers a development platform, which requires the customer to have its own technical resources to be able to use it properly).

The customer's **data is stored on servers that are protected** from viruses, hackers, and other threats, and vendors use secured hypertext transfer protocol secure (HTTPS) protocols and encryption methods to keep the data safe. However, it is recommended that a copy of all critical information (known as data escrow) be kept by an independent third-party company, in the event that the data cannot be retrieved from the vendor's servers. In addition, identity management and sign-on processes need to be put in place in order to ensure that unauthorized people—inside and outside your company—do not have access to sensitive data. All this can be done using different encryption methods and protocols, which need to comply with existing regulations.

EXAMPLES OF INNOVATIVE CLOUD-COMPUTING INITIATIVES

Free and unrestricted access: The ease of deployment and management of CRM solutions in the cloud has allowed vendors to offer limited free functionality to their customers or full functionality for a limited number of users. This is called the “freemium” model, a good option for small companies that do not have complex needs and that may wish to purchase more functional modules as they grow. Some of the vendors offering free CRM solutions in the cloud are Zoho, KarmaCRM, Free CRM, and Workbooks.

Cloud deployment also opens the system to users that are not part of the company, such as customers or partners who are granted access. By creating and managing portals and communities accessible through a Web browser, companies can stay connected with anyone who has an interest in their products or services or in building a business relationship with them.

Development in the cloud: Vendors such as NetSuite and Salesforce.com have created development platforms also stored in the cloud, which allow users to create additional tools and apps that complement existing core CRM functionality. Though they may sometimes require some technical knowledge, these platforms allow most users to perform basic modifications to the interface or workflows, or even create simple apps to work more efficiently. Idea2 is another interesting example of a cloud application builder.

The ease of creating and deploying apps in the cloud has led to the advent of marketplaces—online agoras where people can share, sell, or exchange apps they’ve created. Some of the most popular app marketplaces are [AppExchange](#) from Salesforce.com, [SugarExchange](#) from SugarCRM, and [Google Apps](#) from Google. There are also Web sites that are not vendor-specific, such as [GetApp.com](#). Such apps can provide functionality ranging from basic functions—for example, e-mail integration or calendar management—to more sophisticated needs—for example, electronic signatures (EchoSign), data integration (Talend Open Studio), and project management (Mavenlink). An interesting example is Insightly, a CRM solution designed for Google Apps.

Easier communication and collaboration: Cloud deployment has opened the door to collaboration not only between employees of the same company, partners, and customers, but also between virtually everyone with common interests. We will cover this in more detail in the social media section of this guide. CRM users can now communicate and collaborate more easily, exchange ideas and apps, and also share knowledge—all owing to cloud solutions that integrate with their core CRM product. Vendors that offer collaboration solutions in the cloud include Microsoft (Business Productivity Online Standard Suite), IBM (LotusLive), VMware Zimbra (Zimbra Collaboration Server), Google (Google Apps), Collaborate Cloud, and Salesforce.com (Chatter).

CLOUD CRM VENDORS

Vendor – Product	Delivery Model			Sales Force Automation	Marketing Automation	Customer Service	Help Desk and Support	Customer Analytics	Contact Center
	On Demand ^a	SaaS ^b	Hybrid ^c						
Aplicor – Cloud Suite 7 Aplicor is a global cloud-based software company delivering a cloud suite of business management solutions. Aplicor's cloud suite technology consolidates both front- and back-office information to serve up a single and seamless business system. Cloud Suite 7 gives customers the flexibility and simplicity they need to advance their customer relationships and create a competitive advantage.	•	•	•	•	•	•		•	
Maximizer – Maximizer CRM Maximizer Software delivers CRM solutions to meet the needs of small to medium businesses (SMBs) as well as divisions of large enterprises. With over 20 years of experience in the CRM industry, Maximizer CRM offers a comprehensive set of features. Maximizer Software has more than 120,000 customers.	•			•	•	•			
Microsoft – Microsoft Dynamics CRM Microsoft Dynamics CRM is a fully integrated CRM solution comprising a robust suite of sales, marketing, and customer service capabilities. The product offers businesses of all sizes a fast, flexible, and affordable solution for finding, winning, and growing profitable customer relationships.	•	•	•	•	•	•			
Netsuite – NetSuite CRM+ NetSuite is a Web-based business management system with more than 6,600 customers worldwide. NetSuite is designed to help fast-growing and midsize companies manage their business operations by using a SaaS-based system. NetSuite is headquartered in Silicon Valley with offices throughout USA, Canada, Europe, Asia, and Australia.		•		•	•	•			
Oracle – Oracle CRM On Demand Founded in 1977, Oracle Corporation supplies software for information management. With annual revenues of more than \$10.9 billion (USD), the company offers its database, tools, and application products, along with related consulting, education, and support services, in more than 145 countries around the world.	•			•	•	•		•	
RightNow Technologies* – RightNow CX Founded in 1997, RightNow helps consumer-centric organizations deliver customer experiences and interactions that are rewarding and beneficial to both parties. Headquartered in Montana, USA, RightNow employs more than 1,000 people and serves 2,000 organizations, both public and private, worldwide.		•		•	•	•		•	•
Sage – SalesLogix Cloud and Sage CRM Sage CRM is Web- and wireless-based, providing access to customer sales, marketing, and support information, as well as access to back-office accounting and operations systems. Through its integration server, Sage CRM can access and centralize other information sources from across the enterprise.	•			•	•	•			

CLOUD CRM VENDORS

Vendor – Product	Delivery Model			Sales Force Automation	Marketing Automation	Customer Service	Help Desk and Support	Customer Analytics	Contact Center
	On Demand ^a	SaaS ^b	Hybrid ^c						
Salesboom.com – Salesboom Cloud CRM Founded in 2002, Salesboom.com is a private company with headquarters in Nova Scotia, Canada. Salesboom has more than 95,000 subscribers and 5,800 customers in over 158 countries around the world. The Salesboom on-demand platform drives innovation, enables business change, and enriches customer relations across the enterprise.	•	•		•	•	•			
Salesforce.com – Sales Cloud and Service Cloud With more than 100,000 customers, Salesforce.com is the enterprise cloud computing company that is leading the shift to the social enterprise. With a suite of products for CRM, customer support, social media monitoring, real-time collaboration, and custom, social, and mobile app development, and a revolutionizing platform, Salesforce.com changes the ways companies collaborate, communicate, and share information with customers and employees.		•		•	•	•	•	•	•
Soffront – Soffront CRM Suite Soffront launched its first customer service application in 1993. Soffront integrated CRM is a complete suite of applications that means companies don't have to purchase expensive add-ons for complete business functionality. Soffront customers include small and midsize corporations across all industries and divisions of many Fortune 500 companies.	•	•		•	•	•	•		
SugarCRM – Sugar CRM SugarCRM is the world's leading provider of open source CRM software. Over 7,000 customers and more than 850,000 end users rely on SugarCRM to execute marketing programs, grow sales, retain customers, and create custom business applications. Customers can deploy SugarCRM on-site, behind their firewall, or in the cloud, using Sugar On-Demand or one of its partners clouds.	•	•	•	•	•	•		•	•
Zoho – Zoho CRM Zoho CRM offers companies a complete customer relationship life-cycle management software for managing sales, marketing, customer support, and inventory activities in a single system. It offers features for automation, customization, integration, and collaboration that allow organizations to grow their business and have a 360-degree view of their customer interactions.		•		•	•	•	•		

*In October 2011, Oracle entered into an agreement to acquire RightNow.

^aHosted by vendor, no multitenancy.

^bHosted in data centers, multitenancy.

^cMix of on demand and SaaS.

MOBILE CRM

Although mobile technology is not new for CRM, smartphones and tablets are revolutionizing the way businesses approach CRM as more customers are using these tools as a preferred means of communication—and for shopping.

There are two major types of mobile users: consumers, who access information related to products or services they bought or are intending to buy, and business users, who use mobile devices to access information they need to perform their daily tasks. But this distinction is becoming blurred; many business users also use their mobile devices for consumer purposes, and some consumers are using mobile solutions at work. Companies still approach these user groups differently, and the solutions provided by CRM vendors for mobile devices follow suit.

People in field sales, for example, need to be mobile—they need to be able to meet with prospects or existing customers, present their products and services, set up appointments, and update customer records on the fly, while away from the office. But other types of employees can also benefit from mobile technologies, such as field service teams, or even employees who don't necessarily need to leave the office, but want to be able to read e-mail or check their calendars when not at their desk.

Mobility is an essential component of CRM for companies in order to prevent losing potential business opportunities or new customers from lack of an expedient and effective response. Users must not only have access to data contained in the CRM system through mobile devices, but also be able to easily manipulate it, to find and filter data depending on their needs, to create and edit records and activities, and to synchronize their work with the other people involved (other employees, customer, partners, etc.).

PROS AND CONS OF MOBILE CRM

The ideal mobile solution should be device- and browser-agnostic, which means that the user should be able to access customer information, etc., from any mobile device through any Web browser. This is technologically very difficult to accomplish, mostly because there are several operating systems (OSs) for mobile devices, and the most widely used Web browsers on personal computers (PCs) are not necessarily the most popular on mobile devices (for instance, Google Chrome is very popular on PCs, but there is no version for the Android mobile OS). In addition, there are preferred Web browsers for each major OS. So vendors tend to focus on a few OSs and Web browsers, usually the most popular, but also take into account technical factors, for example, preferring a standard such as HTML5 over Flash for animations and videos.

Finally, mobile deployments of any CRM solution should take into consideration the potential for an increase in the number of users as the business grows. According to a [study](#) by ABI Research, by 2016 the number of mobile business users worldwide is expected to reach 830 million. In addition, mobile devices are continually evolving, as is their supporting architecture. In order to easily accommodate new users, as well as new and better devices, companies are adopting mobile enterprise application platforms (MEAPs). MEAPs enable companies with hundreds or thousands of mobile users to easily deploy multiple applications across multiple device types, reducing the complexity of the maintenance of such deployments, and to scale up as required. This market is served by two major types of vendors: OS-specific, which develop and deploy mobile software for only one mobile OS (vendors such as Microsoft, Research In Motion [RIM], Google, and Apple) and OS-agnostic, which tend to be device and platform neutral (vendors such as SAP Sybase, IBM, Pyxis, Syclo, Magic Software, and Spring Wireless).

One of the advantages of the mobile versions of CRM solutions is that, because they are less complex than full CRM systems (providing only the functionality most relevant to mobile users), they are **easier to install and manage**. But these tasks become challenging when hundreds or thousands of users are using the solution, due to the diversity of mobile devices, platforms, OSs, and Web browsers on the market. This challenge can be addressed through an MEAP.

Security is also a major concern for companies using mobile solutions. Viruses and malware can now target mobile devices. Not only can they affect a user's mobile device, but they can also spread to his or her contacts and even the database the user is synchronizing with. CRM vendors do not currently provide much protection against viruses. Traditional antivirus vendors, such as Kaspersky, Norton, and Bitdefender, as well as vendors with a specific focus on mobile, such as BullGuard and SMobile Systems (now part of Juniper Networks), provide good protection. CRM solutions, however, generally have functionality for securing access to data.

As users may not always be connected to the Internet, the CRM solution must ensure the data is available to mobile users who are offline. And once the user is back online, the mobile CRM solution should synchronize with the server to ensure the data is up to date. CRM vendors such as Sage, SugarCRM, Salesforce.com, and Microsoft Dynamics offer this option, and SugarCRM even offers the ability to store a copy of the pertinent data on the mobile device.

EXAMPLES OF INNOVATIVE MOBILE CRM INITIATIVES

The explosion in the use of mobile devices has triggered the need for more than just core CRM functionality in a mobile CRM solution. And as mobile devices become more sophisticated and powerful, vendors will need to find new ways to acquire and retain customers.

Integrated communication management: Before the existence of mobile CRM solutions, all calls made from or received by a mobile device needed to be logged in a CRM or contact management solution. Also, other types of communication, such as e-mail, faxes, etc., were available only within the CRM system and could not be accessed from mobile devices. All this changed when CRM vendors started offering mobile versions of their products. Products offering such functionality include Sugar Mobile, Mobile Express for Microsoft Dynamics CRM, Oracle Mobile Sales Assistant, RightNow Mobile, Maximizer Mobile CRM, Sage SalesLogix Mobile, Salesforce Mobile, and Sybase Mobile Sales for SAP CRM.

Other companies are also including social media in the communication channels that can be accessed and even managed using mobile devices. Products such as Gist, Batchbook, Xeesm, and Nimble let users track e-mail and social media interactions through a single interface, and are available not only for desktop computers but also for mobile devices.

Help desk and mobile device management: The increasing use of mobile devices has led to the development of software tools to assist mobile users. And as mobile devices work with different OSs than do computers, software used for remote access to computers (desktop or laptop) has been adapted for mobile. Some companies, such as Bomgar, LogMeln, SOTI, and Wavelink, not only provide help desk and remote support for mobile devices, but also offer functionality for wireless infrastructure management, location-based services, security features, asset management, and reporting.

Besides technical support, many vendors offer services for managing and protecting the mobile devices used by a company's employees. An interesting example is RIM's recently launched [BlackBerry Management Center](#), which allows companies to schedule data backups, lock phones remotely when they are lost or stolen, and even restore the content of a lost device on a new one. Such services are usually offered by the manufacturers of the mobile devices (e.g., RIM, Nokia, etc.), but some software companies, such as Juniper Networks, [Sophos](#), [MobileIron](#), Sybase (an SAP company), and [Zenprise](#), have begun specializing in mobile device management.

These tools are essential for mobile CRM. A faulty device can impede the performance of an employee using it on a regular basis. And a lost device, with all the important data it contains, can have disastrous consequences for the employee and the company.

Mobile marketing: Mobile marketing began as a simple short message service (SMS), where companies would send messages to potential or existing customers. With the development of Internet applications for mobile phones and the use of social media, mobile marketing can now take various forms:

- in-game marketing—free versions of popular games such as Angry Birds display advertising
- Quick Response (QR) codes—people use their mobile devices to scan a code, which is translated into a link to a Web site
- location-based marketing—messages are delivered to people based on their location, determined by the global positioning system (GPS) in their mobile device
- mobile marketing via Bluetooth or Proximity Systems—users within a predefined geographical area receive advertising messages

Mobile marketing is not yet very well standardized, and concerns exist about the privacy and security of the users targeted by it. The [Mobile Marketing Association](#), a global non-profit trade association established to foster the growth of mobile marketing, is working on addressing these challenges; it also offers a [Mobile Marketing Industry Directory](#).

Mobile commerce: Since SMS was first used for mobile commerce in Finland in 1997, new technologies have emerged. These allow companies to offer online coupons, which can be bought and redeemed using a mobile device (e.g., see Groupon), online tickets, which can be scanned by the mobile device and don't need to be printed; payment options using mobile devices; and even mobile brokerage (for stock market services).

Mobile devices have generated a huge market for products and services specific to them, such as ringtones, wallpapers, and tools to personalize and manage smartphones and tablets, as well as all types of apps (for productivity, communication, games, entertainment, etc.).

Finally, customers can use their mobile devices to track the status of their orders, to place reorders, or to contact customer service regarding any problems with their orders, using their preferred communication channel. Important vendors offering mobile commerce solutions include Magento, iLoop Mobile, MarketLive, 5th Finger, and iCongo.

MOBILE CRM VENDORS

Vendor – Product	Functionality						Technical Specifications						
	Contact Management	Activity Management	Opportunity Management	Social Networking	Maps and Navigation	Help Desk and Support	Analytics	Customizable	Available Offline	Synchronization	Smartphones	Tablets	Handheld Devices
CDC Software – Pivotal CRM CDC Software is headquartered in Georgia, USA, and has more than 2,000 employees in 32 offices worldwide serving more than 6,000 customers spanning 50-plus countries. Leveraging a service-oriented architecture (SOA), CDC Software offers multiple delivery options for its solutions, including on-premise, hosted, cloud-based software as a service (SaaS), and blended or hybrid deployment offerings.	●	●	●						●	●	●		●
FrontRange Solutions – GoldMine Mobile Headquartered in California, USA, FrontRange Solutions is a leading provider of powerful and affordable IT Service Management, IT Asset Management, and Customer Service Management solutions. FrontRange’s products and solutions are used by over 13,000 customers in more than 80 verticals and 45 countries to improve interactions with external and internal clients and achieve better business results.	●	●	●			●	●	●	●	●	●	●	
Maximizer – Maximizer CRM Maximizer Software delivers CRM solutions to meet the needs of small to medium businesses (SMBs) as well as divisions of large enterprises. With over 20 years of experience in the CRM industry, Maximizer offers a comprehensive set of features in a CRM solution. Maximizer Software has more than 120,000 customers.	●	●	●		●		●		●	●		●	
Microsoft – Microsoft Dynamics CRM Microsoft Dynamics CRM is a fully integrated CRM solution comprising a robust suite of sales, marketing, and customer service capabilities. The product offers businesses of all sizes a fast, flexible, and affordable solution for finding, winning, and growing profitable customer relationships.	●	●	●	●	●		●	●	●	●	●	●	●
NetSuite – NetSuite CRM+ NetSuite is a Web-based business management system with more than 6,600 customers worldwide. NetSuite is designed to help fast-growing and midsize companies manage their business operations by using a SaaS-based system. NetSuite is headquartered in Silicon Valley with offices throughout USA, Canada, Europe, Asia, and Australia.	●	●	●							●	●		●

MOBILE CRM VENDORS

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Vendor – Product	Functionality							Technical Specifications					
	Contact Management	Activity Management	Opportunity Management	Social Networking	Maps and Navigation	Help Desk and Support	Analytics	Customizable	Available Offline	Synchronization	Smartphones	Tablets	Handheld Devices
Oracle – Oracle CRM On Demand Founded in 1977, Oracle Corporation supplies software for information management. With annual revenues of more than \$10.9 billion (USD), the company offers its database, tools, and application products, along with related consulting, education, and support services, in more than 145 countries around the world.	•	•	•	•	•						•		•
RightNow Technologies* – RightNow CX Founded in 1997, RightNow helps consumer-centric organizations deliver customer experiences and interactions that are rewarding and beneficial to both parties. Head-quartered in Montana, USA, RightNow employs more than 1,000 people and serves 2,000 organizations, both public and private, worldwide.	•	•	•			•		•			•		
Sage – SalesLogix Mobile Sage CRM is Web- and wireless-based, providing access to customer sales, marketing, and support information, as well as access to back-office accounting and operations systems. Through its integration server, Sage CRM can access and centralize other information sources from across the enterprise.	•	•	•	•	•		•	•	•		•	•	
Salesforce.com – Chatter Mobile, Salesforce Mobile With more than 100,000 customers, Salesforce.com is the enterprise cloud computing company that is leading the shift to the social enterprise. With a suite of products for CRM, customer support, social media monitoring, real-time collaboration, and custom, social, and mobile app development, and a revolutionizing platform, Salesforce.com changes the ways companies collaborate, communicate, and share information with customers and employees.	•	•	•	•	•	•	•	•	•	•	•	•	•
SAP – Sybase Mobile Sales for SAP CRM Founded in 1972, SAP provides business software applications and services to companies of all sizes in more than 25 industries. With subsidiaries in over 50 countries, SAP employs more than 48,500 people in over 50 countries. Today, more than 89,000 companies in over 120 countries run SAP software.	•	•	•				•	•			•		•

MOBILE CRM VENDORS

Vendor – Product	Functionality						Technical Specifications						
	Contact Management	Activity Management	Opportunity Management	Social Networking	Maps and Navigation	Help Desk and Support	Analytics	Customizable	Available Offline	Synchronization	Smartphones	Tablets	Handheld Devices
Soffront – Soffront CRM Suite Soffront launched its first customer service application in 1993. Soffront integrated CRM is a complete suite of applications that means companies don’t have to purchase expensive add-ons for complete business functionality. Soffront customers include small and midsize corporations across all industries and divisions of many Fortune 500 companies.	•	•	•				•				•		
SugarCRM – Sugar Mobile SugarCRM is the world’s leading provider of open source CRM software. Over 7,000 customers and more than 850,000 end users rely on SugarCRM to execute marketing programs, grow sales, retain customers, and create custom business applications. Customers can deploy SugarCRM on-site, behind their firewall, or in the cloud, using Sugar On-Demand or one of its partners’ clouds.	•	•	•	•	•		•	•	•	•	•	•	
Zoho – Zoho CRM Mobile Edition Zoho CRM offers companies a complete customer relationship lifecycle management software for managing sales, marketing, customer support, and inventory activities in a single system. It offers features for automation, customization, integration, and collaboration that allow organizations to grow their business and have a 360-degree view of their customer interactions.	•	•	•		•				•	•			

*In October 2011, Oracle entered into an agreement to acquire RightNow.

SOCIAL CRM

Most CRM vendors today are jumping onto the social CRM bandwagon, whether by integrating their solutions with social media tools or by allowing customers to build and manage online communities. A social CRM solution is essentially any software product that gathers and manages data from social platforms to help companies better manage their relationships with their customers.

Although experts do not always agree on its definition, social CRM has been declared to be extremely important by several very popular online publications (e.g., [Mashable](#) and [Inc. Magazine](#)). This is because no matter how you define social CRM, customers and prospects are increasingly connected to the social universe.

People connect to the social universe by using a platform to share thoughts, news, pictures, and videos; interacting with people via, for example, Facebook, Twitter, or Google+; interacting with professionals from across the world using LinkedIn and Viadeo; looking for new business opportunities using Jigsaw or NetProspex; listening to music on Spotify or Grooveshark; or managing and publishing documents using tools such as Box.net, Dropbox, Scribd, or SlideShare. By integrating their solutions with any of these platforms and tools, CRM vendors allow their customers to be present wherever there's a conversation about them, which allows vendors not only to monitor what's being said about them, but also to attract new customers.

Anyone using the aforementioned tools can have an impact on the companies they work for or interact with, by posting or commenting on blog entries, videos, or presentations about that company. Companies are now realizing that they can not only listen to what their customers or prospects are saying about them, but also communicate with their customers—both satisfied and dissatisfied—in order to improve their products and services, as well as their image.

But since all these tools are only a small part of the existing social media offerings, and people usually use a combination of two or more tools, companies face challenges in listening to and interacting with customers. First, they need to be present in the social media universe and to focus on those tools that their customers are more likely to use. For instance, if most of a company's customers have profiles on Facebook, the company would probably not benefit much from having a presence on Twitter.

Second, once they have established which social communications channels are best for them and their customers, companies need to come up with a strategy for gathering information and responding to it. Not all information created and shared by people using

social media has the same value to the company, and not all customers or prospects have the same expectations regarding the way they want to interact with companies. Companies need to pay particular attention to the various ways in which they acquire and share information (either by building communities that span multiple social platforms, or by using those platforms and analyzing the interactions thus generated) and be aware of the different options offered by CRM and social CRM vendors (e.g., functionality integrated into CRM, add-ons or apps, separate solutions, etc.). No matter how it is done, the end result is an ongoing transfer of data between the CRM system and any social tools and platforms that the company might be using.

Finally, all the relevant data and interactions with people using social tools need to be analyzed. This type of analysis can help a company evaluate the effectiveness of its social media strategy, but it can also be more broadly used to determine patterns in customer behavior—which ultimately allows companies to target and serve its customers better. As part of a CRM solution, social data can be used to better create and manage campaigns, and better address issues or build knowledge bases for customer service. Behavior patterns with analysis from the sales and product development perspectives can influence a company's overall market strategy.

Traditional CRM vendors have responded to the new social media phenomenon by introducing functionality that allows their products to exchange information with social media platforms, either supported out of the box or through integration or offered as add-ons to the core product. Start-up companies have been quick to identify the gap in the market and create tools and solutions that usually do not offer core CRM functionality (marketing automation, sales force automation, etc.) but which do a great job of enabling people to interact and communicate using social media. Many of these products have ended up being acquired by larger vendors, or even by social media platform providers such as Google, Facebook, and Twitter.

The end result is twofold: many traditional CRM vendors now offer at least some functionality for social media, and the companies that started out with a focus on social media are also expanding their reach by adding more robust CRM functionality to their offerings.

The most important advantage of any social media functionality related to CRM is to ensure continuous dialogue between companies and their potential and existing customers. The benefits are not limited to marketing campaigns to improve the customer's perception of the company and its products and services, but can extend to other activities, including customer service, knowledge sharing, event planning, product development, etc. The value of this approach lies in that social data is continuously updated (see crowdsourcing below) and ever growing. While customers and prospects may form a relationship with

a company, perhaps more importantly they are interacting with each other. Vendors are integrating social media functionality with their CRM solutions because companies need to be where their customers are—ready to listen and engage. This is also an opportunity for companies to distribute their content in the social media universe, which fans and followers may redistribute.

In conclusion, social media and its integration with CRM solutions helps companies better communicate with their customers, improve the way they distribute content related to their products and services, and enhance their offerings by gathering and analyzing feedback from customers and prospects. Companies also need to realize that they are no longer the ones controlling the conversation about them. All they can do is manage the conversation: monitor, react, and engage.

PROS AND CONS OF SOCIAL CRM

Social media **generates a lot of information**, but also a lot of noise. Companies need to find ways to filter the billions of posts, tweets, comments, videos, etc., and analyze only what matters to them and their customers. This can be addressed by social analytics solutions, which we will describe in more detail later in this guide.

The Pareto principle applies here: the majority of content relevant to a company is being generated by a minority of users. And there are ways to filter the content being analyzed—by filtering the people that the company follows and interacts with.

Though companies have a tremendous **source of feedback** in the information created using social media, they need to be careful in analyzing their customers' needs and behaviors so that they do not overstep their bounds. There is ongoing debate over privacy rights on social media platforms and who owns the data people create. Although most social media platforms give users control over what gets shared and with whom, the apps created for these platforms are often either too restrictive or too invasive with regard to user information.

Another advantage of any social media platform is that it enables its users to share thoughts with other people. Companies may see this **freedom of expression** as a potential threat, as the spreading of confidential data or incomplete information might have an adverse impact on their image or brand.

As a result, companies have created policies regarding acceptable employee behavior with respect to social media in order to protect themselves from damage they may incur from incorrect or incomplete information. Here is a list of social media policies from large companies from various industries (e.g., BBC, Cisco, Gartner, Ford, IBM, SAP, etc) as well as some government agencies in the USA and UK: <http://socialmediagovernance.com/policies.php>.

Social media brings amazing opportunities, but also important challenges, and companies need to understand both before embarking on a social media initiative. To overcome these challenges, companies must make strategic investments in CRM and social CRM solutions but also in people dedicated to implementing, monitoring, and enhancing social media initiatives.

EXAMPLES OF INNOVATIVE SOCIAL CRM INITIATIVES

Social analytics: Social analytics enables companies to filter from the large volume of available data the communications and content that can help them better interact with their customers and prospects. The main challenge here is that social data is unstructured, as opposed to data that is stored in tables with predefined structures. So before analyzing social data, there's a need to define some algorithms in order to organize all the comments, tweets, blog posts, etc. The data can then be manipulated by data mining companies, which interpret and analyze it; some are traditional business intelligence (BI) companies (e.g., MicroStrategy, QlikTech, SAS, IBM Netezza, and Teradata), while others specialize in social data (e.g., Alterian, Cymfony, Radian6, Salesforce.com, Astute, Connotate, IBM Coremetrics Social Analytics, Attentio, and Clarabridge).

It is also important to analyze large volumes of data and determine the type of feedback received from social media users (i.e., positive or negative). This is called sentiment analysis or opinion mining. By applying [natural language processing](#) and [computational linguistics](#) to customer content in social data (blog posts, posts and comments on social platforms, etc.), companies can determine customer behavior patterns and attitudes. A basic approach to this kind of analysis involves counting the occurrence of negative versus positive words in social data to determine whether people agree or disagree, or like or dislike companies, products, brands, etc. But since support and criticism can be expressed in ways that cannot always be clearly identified as positive or negative, vendors have created sophisticated algorithms that allow companies to better analyze the data and draw more accurate conclusions regarding the opinions and attitudes of customers and prospects about a company or brand. A sound analysis can generate valuable feedback that can be used to improve the products and services companies offer, and thus increase customer satisfaction.

Crowdsourcing: As the name implies, crowdsourcing is based on the power of the crowd—or community or collective, if you will—and combines the efforts and knowledge of individuals to create and maintain information that can be used by, in the context of this discussion, companies and their customers. Crowdsourcing can help companies better manage their contacts. With traditional contact management or CRM solutions, a company's employees need to update contact information; but with crowdsourcing for contact management, anyone using the contact database can update any contact, and the system encourages people to do so by rewarding them with credits to purchase other contacts. Jigsaw (now a Salesforce.com company) and NetProspex, two of the most important players in contact management and crowdsourcing, work with many CRM vendors to help their customers keep their information up to date.

But crowdsourcing can also be used for activities that traditionally have nothing to do with CRM, such as product development. Companies such as Procter & Gamble have created portals where people can share ideas and suggestions about new products or enhancements. People with the most popular ideas receive rewards, while the company gets valuable customer feedback. More information about crowdsourcing for product development can be found in the section on extended CRM functionality (see page 30).

Organizations have successfully used crowdsourcing to address practical, logistical problems (e.g., [Waze](#), a GPS map service that reports accidents, speed traps, weather conditions, etc., in real time) as well as to highlight social and political issues (e.g., [HarassMap](#), a map of Cairo that indicates areas where incidents of sexual abuse have been reported). While crowdsourcing has demonstrated value in a social, nonprofit environment, it clearly has potential applications to a business context, particularly for CRM.

Collaboration: Social media has extended the possibility of collaboration beyond the walls of a company, and some vendors have started creating solutions that allow their corporate customers to create their own low-scale social media universe. Such solutions allow companies to create and manage communities of people, who can still use their preferred social media tools, but will interact on a common platform provided by the company. A good example is a Facebook page, which companies can use for communicating to, but also interacting with, customers and prospects. To some extent, it can also be used for customer service (when customer service representatives get involved) or even product development (when ideas and suggestions are used to improve the offering of the company).

Companies can also create communities through portals dedicated to a company or brand. Although such communities can integrate with social media platforms, they need to be managed using tools that the company owns and fully controls. Companies can thus easily gather and analyze immediate data from their own communities, and better communicate by embedding their own content in various forms (such as text, video, etc.). User management is made easy because it's centralized and people can manage certain settings themselves. These types of solutions are usually deployed in the cloud.

Finally, community members have a consistent interface and tools not only to interact, but also to collaborate and exchange information in the online community. And the company can more easily understand the level of engagement and the behavior of its customers. All this information helps companies to determine the needs of their customers (with respect to their expectation of the company's products and services), while giving companies a better way to communicate with people using their preferred channels. The information generated by communities is essential to CRM, and social media functionality has fast become an important component of CRM software, to execute better campaigns, customer service, and other activities inside the community. Vendors offering such products include Mzinga, Jive Software, Lithium Technologies, Liferay, Telligent, and INgage Networks.

Engagement: A key factor to consider when creating and managing social communities is the influence of its members. Though all members are important, some prove to have a greater influence on others. Using analytics, a company can measure a person's social footprint, and then target individuals with a strong online presence when launching new products or services. The idea is that an influencer—someone with a reputation for being competent and neutral—can be more effective than the average community member, and have a stronger impact than even traditional marketing campaigns, in transmitting a message about a company and its products. Social media has created a new category of influencers, which are—most of the time—very different from the media celebrities who have traditionally influenced people's opinions. So instead of targeting thousands of people by e-mail—which will likely be ignored by most recipients—companies can now target influencers, who are more likely to listen and take action, sharing the message through their social platform.

A related concept is gamification. Basically, it applies the rules used in computer games that reward valuable players to customers or prospects who bring valuable contributions to communities. Reward systems such as points and badges motivate people to contribute even more and encourage others to interact. Vendors such as BigDoor, Badgeville, Raptive, and CloudCaptive offer tools and platforms that allow companies to engage and motivate their customers and prospects through gamification.

All the social media tools discussed above are integrated with CRM solutions. This allows companies to transfer data from social tools and platforms to traditional CRM modules to run campaigns, manage leads, build knowledge bases, analyze the efficiency of customer service, etc. Companies also use traditional CRM data with social tools, in order to engage the most important customers, quickly respond to questions and comments, publish content, etc. If these social media tools do not integrate with CRM solutions—but run in parallel with them—companies may find themselves duplicating effort, or simply being unable to analyze data outside of the CRM system or to synchronize their social data with CRM data.

SOCIAL CRM VENDORS												
Vendor – Product	Functionality						Integration					
	Collaboration	Crowdsourcing	Communities	Monitoring	Analytics	Core CRM ^a	Traditional CRM Systems	Document and Content Management	Social Platforms ^b	Office Productivity Tools	Business Intelligence and Analytics	Other Social Solutions
Alterian – Customer Engagement Platform Alterian provides a marketing platform for integration of analytics, content, and execution tools that enable companies to build integrated communication strategies for a more personalized customer experience. The Alterian Customer Engagement Platform provides marketers with a measurable return on investment (ROI) in a simple, user-friendly interface.	•			•	•		•	•	•		•	
Attensity – Customer Experience Management Solutions Attensity delivers an integrated suite of Customer Experience Management applications to meet the demands of a new breed of empowered customers. Attensity's solutions are powered by semantic technologies that allow organizations to listen, analyze, relate, and act on multichannel customer conversations.				•	•	•	•		•		•	•
Bazaarvoice – Ratings & Reviews, Ask & Answer, Social Connect, Stories, Customer Intelligence, Brand Answers Bazaarvoice is a privately held company that brings the power of social commerce to customer-centric companies. Headquartered in Texas, USA, and with offices across Europe and in Asia and Australia, the company enables businesses to lead, capture, analyze, and share customer conversations.	•	•	•		•		•				•	•
Demand Media – Pluck, CoveritLive Demand Media is a content and social media company. The company's integrated community platform, Pluck, is a hosted enterprise solution that powers conversation and interaction on Web sites, Facebook, and mobile devices. Brands use Pluck to build social experiences that deliver on business objectives for engagement, conversion, and advocacy.		•	•	•	•			•	•		•	•

SOCIAL CRM VENDORS

Vendor – Product	Functionality						Integration					
	Collaboration	Crowdsourcing	Communities	Monitoring	Analytics	Core CRM ^a	Traditional CRM Systems	Document and Content Management	Social Platforms ^b	Office Productivity Tools	Business Intelligence and Analytics	Other Social Solutions
INGage Networks – ELAvate INGage Networks is a provider of enterprise social software solutions for business and government. Based on its enterprise social software platform, INGage’s suite of applications provides the ability to meet multiple needs throughout an organization—using social to drive value.	●	●	●		●		●	●	●		●	
InsideView – InsideView Headquartered in California, USA, with operations in India, InsideView brings intelligence gained from social media and traditional editorial sources to the enterprise to increase sales productivity and velocity. InsideView for Sales continuously aggregates and analyzes relevant executive and corporate data from thousands of content sources to uncover new sales opportunities.	●				●	●	●	●	●			
Jive Software – Jive Social Business Jive is a leading social business company that brings social innovations from the consumer world into enterprises securely and at scale. Jive’s social business software combines the power of community software, collaboration software, social networking software, and social media monitoring offerings into an integrated platform.	●	●			●		●		●	●	●	
KANA – KANA Service Experience Mangement KANA offers a service experience management (SEM) solution that gives managers total control over the customer service process, so they can take care of their brand while taking care of customers. By unifying customer journeys across the contact center, Web site, and social community, KANA’s solutions have reduced handling time, increased resolution rates, and improved Net Promoter Score (NPS).	●			●	●	●	●	●	●	●	●	
Lithium Technologies – Lithium Social Customer Suite Lithium offers a single suite of products for engaging social customers wherever they are online—Facebook, Twitter, and communities on your Web site. Lithium helps you build a brand nation of passionate advocates that act as an extension of your marketing, sales, and customer service teams.	●	●	●	●	●		●	●	●		●	

SOCIAL CRM VENDORS

Vendor – Product	Functionality						Integration					
	Collaboration	Crowdsourcing	Communities	Monitoring	Analytics	Core CRM ^a	Traditional CRM Systems	Document and Content Management	Social Platforms ^b	Office Productivity Tools	Business Intelligence and Analytics	Other Social Solutions
Mzinga – Mzinga OmniSocial Suite Mzinga OmniSocial helps customers increase revenue and lower costs by enabling team collaboration, enterprise-wide communication, increased brand visibility, and more efficient customer service and support. Mzinga currently reaches desktops in 160 countries and supports 40 million users.	•	•	•	•	•		•		•	•	•	•
Nimble – Nimble Nimble is a social business platform. It enables all Twitter, Facebook, LinkedIn, Outlook, and Gmail calendar events and conversations to be unified in one simple dashboard. Nimble's functionality is further extended through its open application program interface (API), which allows for integration with apps like MailChimp, Wufoo, and HubSpot. Nimble can be used by one person or an entire team for easier collaboration and greater transparency.	•			•		•	•		•			•
RightNow Technologies* – RightNow CX Founded in 1997, RightNow helps consumer-centric organizations deliver customer experiences and interactions that are rewarding and beneficial to both parties. Headquartered in Montana, USA, RightNow employs more than 1,000 people and serves 2,000 organizations, both public and private, worldwide.			•	•	•	•	•		•			
Salesforce.com – Social Enterprise With more than 100,000 customers, Salesforce.com is the enterprise cloud computing company that is leading the shift to the social enterprise. With a suite of products for CRM, customer support, social media monitoring, real-time collaboration, and custom, social, and mobile app development, and a revolutionizing platform, Salesforce.com changes the ways companies collaborate, communicate, and share information with customers and employees.	•	•		•	•	•	•	•	•	•	•	

SOCIAL CRM VENDORS

Vendor – Product	Functionality						Integration					
	Collaboration	Crowdsourcing	Communities	Monitoring	Analytics	Core CRM ^a	Traditional CRM Systems	Document and Content Management	Social Platforms ^b	Office Productivity Tools	Business Intelligence and Analytics	Other Social Solutions
SugarCRM – Sugar CRM SugarCRM is the world's leading provider of open source CRM software. Over 7,000 customers and more than 850,000 end users rely on SugarCRM to execute marketing programs, grow sales, retain customers, and create custom business applications. Customers can deploy SugarCRM on-site, behind their firewall, or in the cloud, using Sugar On-Demand or one of its partners' clouds.	•				•	•	•	•	•	•	•	•
Telligent – Telligent Evolution, Telligent Enterprise, Telligent Community, Telligent Analytics Telligent is an innovative enterprise social community and workforce collaboration software company founded in 2004 by technology visionary Rob Howard. Telligent enables organizations to use social CRM to improve sales, marketing, and customer service processes through social engagement and by crowdsourcing customer intelligence. Telligent powers thousands of online communities that deliver measurable business results for world-class brands including Dell, Microsoft, Psion, and more.	•	•	•	•	•	•	•	•	•	•	•	•
XeeMe – XeeMe XeeCorp. provides social media engagement tools for networking, growing popularity, and strengthening relationships. XeeCorp. also provides a unique social address book, social media time management, social relationship management, and a variety of other social networking applications. The main purpose of all XeeCorp. solutions is to help execute a high-impact social media strategy.	•				•	•	•		•	•		

*On October 24, 2011, Oracle entered into an agreement to acquire RightNow.

^aSFA, contact management, etc.

^bFacebook, Twitter, and LinkedIn.

EXTENDED CRM FUNCTIONALITY

Some CRM vendors are expanding beyond their core competencies to offer more flexible solutions, and fill the gaps left unfilled by large CRM vendors. They are doing this by integrating their CRM solutions with other solutions, developing newer platforms, forging partnerships, creating applications marketplaces, and more. Their objective is to offer their customers functionality that is traditionally not part of a CRM system but is being increasingly viewed as complementary to a solid CRM strategy, such as content management, human resources, business intelligence, or project management.

For many years, sales and marketing people used a separate system from accountants, warehouse managers, etc. This scenario changed, however, when large ERP vendors took a holistic approach to managing both internal and external information by including CRM functionality in their offerings. But vendors offering CRM-only solutions have been slow to create extended functionality by adding business process management, IT service management, product development, human resources, etc. to traditional CRM functionality.

The advent of cloud computing has allowed companies to buy and use more software functionality for relatively low costs, compared with on-premise solutions. Solutions using this delivery model are easier to integrate with other products in the cloud because they use similar technology and platforms; in fact, many vendors offering extended CRM functionality use this model. This also creates opportunities for social media interactions—as social media occurs almost exclusively on the Internet (except for internal communities, such as intranets, created by companies), cloud solutions, which are also Internet-based, can more easily integrate with social platforms.

In addition, Web-based systems and programming platforms and languages such as .NET and Java allow for seamless integration between different systems. Add-on solutions can now be embedded into core CRM packages, and end users can use different tools in the same browser or even on the same screen. When delivered in the cloud, extended CRM solutions are useful for companies that do not have the IT resources to store their own data on-premise or integrate and maintain different systems.

PROS AND CONS OF EXTENDED CRM FUNCTIONALITY

When selecting extended functionality—most often in the form of add-ons that are integrated with the core CRM package—companies should clearly understand how those products can be used, and if they are sold separately or included in the price of the solution. Having this information up front helps customers avoid unpleasant surprises (such as using an add-on solution, but then realizing that the add-on requires extra costs or extra work to integrate and maintain).

This extra functionality can be separated into two main categories:

- external, or customer-oriented—helps companies better interact with customers and prospects
- internal, or process-oriented—for managing and improving internal workflows and processes related to relationship management

The main advantage of extended CRM functionality is that it affords customers more functionality than a traditional CRM system. On the other hand, some vendors may not offer CRM modules that some customers deem necessary, forcing customers to use two or more systems—for example, one for help desk and another for marketing automation or sales force automation.

Extended functionality can also be provided in the form of development platforms, which allow companies to not only manage their CRM installations, but also create apps and add-ons that are required for their specific needs. Available platforms include the NetSuite and Salesforce.com platforms for cloud computing (see Examples of Innovative Cloud-computing Initiatives, page 10) and similar initiatives such as the Microsoft extended relationship management (xRM) framework, Oracle Fusion Middleware, and SAP NetWeaver Application Server.

Finally, another advantage of extended CRM functionality is that it precludes the purchase of a best-of-breed solution, with its associated high costs in system deployment and maintenance. Add-ons can be plugged into existing systems and typically require minimal intervention.

EXAMPLES OF INNOVATIVE EXTENDED CRM FUNCTIONALITY INITIATIVES

Enterprise feedback management and **customer experience management** have not been adequately addressed in traditional CRM systems. This is because feedback from customers could not be gathered for many businesses, and when it was gathered, it was stored as unstructured data, in notes and comments fields, which was difficult to analyze. Nowadays, vendors offer either feedback management solutions, to complement existing CRM functionality, or customer experience management solutions, with strong functionality for gathering, analyzing, and generating actions based on customer feedback. Vendors providing feedback management solutions include Conformit, RightNow, Vovici, and Inquisite.

Enterprise feedback management software can be used not only to create portals and communities to gather information, but also to tap into social media, point-of-sale data, phone surveys, and purchasing history from various other business software solutions. Some vendors even go a step further to offer customer experience management, allowing a company to track its entire relationship with a given customer. [Service experience management](#) solution vendors include KANA, and feedback management solution vendors, which also offer some customer experience management functionality, include Corsential, Strativity, and Tealeaf.

Content management is an important component of CRM, and refers to the tracking of all content communicated to a company's customers and prospects. It includes all documents (e.g., brochures, case studies, and white papers) and Web content (such as Web sites and social media content) that are available for viewing. All this content must comply with not only internal quality standards (related to style, format, structure, metadata, etc.), but also local and international legal regulations. Companies need to be able to import and export their marketing- or sales-related content to and from their CRM systems as well as make it available to their sales and marketing personnel. Vendors providing content management functionality for CRM include CrownPeal, Marqui, Limelight Networks, and eZ Systems.

And since most customers and prospects use the Internet, companies are recognizing the value of Web content management (WCM). Some vendors of content management systems have adapted their products so that companies can provide a better customer experience. Some of these products include Adobe WCM, Autonomy, FatWire (an Oracle product), IBM WCM, Microsoft SharePoint Server, OpenText Enterprise Content Management, and Sitecore WCM.

Furthermore, by developing and publishing content using rules to improve visibility (e.g., search engine optimization), companies can generate leads and valuable data from their

customers. E-mail marketing and other types of campaigns can be created based on content defined and managed using content solutions, and integrating those campaigns with CRM software to allow decision makers to track their efficiency.

Business intelligence (BI) and analytics functionality is offered by most CRM vendors today, providing centralized views in dashboards and the ability to make changes to reports, drill down for more details, and share statistics and graphs with other people.

Large vendors such as Oracle and Microsoft make available their own internally developed BI tools with their CRM offering, but most CRM vendors use tools from BI vendors such as MicroStrategy, SAS, and Cognos. In addition, some vendors have gone a step further to create solutions to gather and analyze information specifically about customers—what is known as customer intelligence. Some of these solutions include SAS Customer Intelligence, Utopy, Market Force Information, Convergys, and Quaero.

Human resources solutions, like CRM solutions, help a company manage its relationships—but with its employees. Some traditional CRM vendors (e.g., NetSuite Employee Center, Salesforce.com, Oracle PeopleSoft) have started offering employee relationship management functionality—that is, for the creation and management of employee profiles, activities such as training sessions, documents like contracts, job descriptions, and workflows or alerts, etc. Smaller CRM vendors offering some HR functionality include Zoho Applicant Tracking System, Salesboom Employee Management, Meltwater Talent, Dovetail Support Suite for HR, and HRPower and HRForce from Neocase Software.

Through HR functionality, vendors allow companies to recruit and manage sales and marketing personnel. Blackboard Learn for Sales, for example, can be used with Salesforce.com products to provide training for sales people. HR functionality for CRM is important for small and medium businesses that may not buy an HR solution but would still like to have at least some HR modules that they can use to manage their sales force.

Product development benefits from the crowdsourcing opportunities of social CRM solutions. Traditional product development software vendors can integrate their products with CRM solutions and use the information gathered during customer management for product development. In crowdsourcing, the exchange of ideas and collaboration can lead to new or better products. And the feedback gathered by customer service departments can be used to understand what customers dislike about the products, so that they can be improved.

Vendors such as IdeaScale, CambrianHouse, and Innocentive help companies make good use of their user or customer communities for product development. Other vendors have combined CRM products with product development and portfolio tools, such as Accept360

through its product called Accept360 Ideas for Oracle CRM On Demand, which allows Oracle CRM companies to capture customer feedback and turn it into ideas. And PTC offers Windchill SocialLink, a social product development solution that connects product teams with product and practice communities.

Project and business process management (BPM) is a functionality now covered by CRM. The need of sales and marketing departments for project management functionality and the ability to create and manage business processes was traditionally addressed by integration with tools such as Microsoft Project and other project management solutions, and some CRM vendors offered workflow functionality, which only partially addressed these BPM needs. One of the early examples of BPM used in CRM is the Onyx Process Manager, acquired by Consona and incorporated into Consona Case Management. Microsoft Dynamics relies on Microsoft technology (e.g., Windows Workflow Foundation) but also its partners (e.g., Orbis Software and Bluespring Software) to provide BPM with its CRM offering. Other vendors that include BPM functionality in their CRM offering include Amdocs, Salesforce.com, Oracle (Siebel), CDC Software (CDC Pivotal CRM), RightNow, Chordiant, Sword Ciboodle, and Pegasystems.

Better processes can reduce the time required to resolve customer issues, allow marketing personnel to better manage and perform campaigns, and enable designers to use feedback to improve existing products or create new ones, particularly when project management functionality is included or integrated with CRM systems. Vendors combining project management with CRM include SugarCRM, Salesforce.com, Zoho, Blue Camroo, Motivity Solutions, Cosential, Norada, WORKetc, TimeLinx (project management and back-office integration with Sage CRM and Sage SalesLogix), and various Microsoft Dynamics Partners (such as AbleBridge, Planet xRM).

BEWARE OF INNOVATION FOR INNOVATION'S SAKE

Customers looking for CRM solutions, in addition to thoroughly assessing their business needs, should carefully review the various software products vendors have to offer—whether those vendors have innovated to develop new features or they focus on traditional CRM functionality. Innovation is great, but remember that innovative products can also bring challenges that your company might not be ready to deal with.

New technology and old business logic can be a terrible combination. New programming languages and platforms can be used to create user-friendly interfaces, dashboards, and widgets to group and display information into a single screen, but this is not very useful if the data is not stored and managed based on business logic and best practices that make it easier to retrieve and analyze.

To avoid falling into the trap of acquiring new technology with old business logic, test it before you buy, and focus on the operations that your employees perform on a regular basis. Sometimes a new interface is just a way to make a solution look better, which may make it more accessible, but may not help with business processes and workflows.

Innovative technology doesn't always fit well with your existing tools. If you found a great tool to gather customer feedback using social media, but you need to first export the results manually in order to import them into your CRM system and then analyze them in a separate BI tool, the whole exercise might not be worth the investment.

Look at the tools that the new solution needs to integrate with, starting with the ones that are critical for your daily operations. Try to estimate the resources required for implementing and using innovative technology, as well as their costs, and compare them to the expected output. For instance, using a portal for account receivables may not help if your customers prefer to receive invoices by e-mail.

Innovative technology will always cost you something but return on investment (ROI) is always hard to calculate. Even when it's free, an innovative CRM solution will cost you time and effort to test it, implement and integrate it, maintain it, etc. And it's almost impossible to calculate ROI for innovative technology, because you don't know what extra investments it will require in the future; it's also hard to isolate the effects that innovative technology has on the efficiency of your company.

Adopting innovative technology will always entail risks, but you can limit them by using a phased approach: start by embracing the innovative technology for a few business activities that are important to you and extend it to others only if it proves to be useful. A good practice is to have a small team of motivated and enthusiastic people pilot such initiatives and then scale them to others if they prove to be efficient. Imposing the innovative technology at the enterprise level right away will most probably create disruptions, which will translate into indirect costs.

Innovation isn't always a commitment for vendors. Your CRM vendor may not have innovation included in its long-term product map. For niche vendors, it gets even more complicated, because they might be acquired by larger companies—the solution is often incorporated into a broader product, and its future development may change direction entirely.

Vendors with a proven history of innovation may be considered safer from this perspective, but the ideal way to address this challenge is to make sure that the solutions you use for CRM are flexible enough to allow you to integrate with others by adding or removing new modules and add-ons, develop new functionality, and keep the changes when your vendor changes its development strategy. Also, make sure you can easily get your data back when you decide to opt out of solutions that seemed innovative but aren't meeting your expectations.

Embrace innovation, but never for innovation's sake. A person may pay hundreds of dollars for a new gadget just to be one of the first to have it, but companies cannot afford to spend hundreds of thousands of dollars and a lot of time on innovation without a strong motivation and analysis of the investments required. In other words, impulse purchasing of innovative technology is very costly for a company. You need a level-headed approach to innovation, to avoid wasting time and money, and so as not to disrupt your relationships with your customers and partners (e.g., some of them may not be ready or willing to adopt the innovative technology you find so great, or others may not have the IT infrastructure to use that technology) or disappoint them if you're not able to deliver (e.g., if you build an online community, make sure someone will manage it, or it can be worse than not having one).

CONCLUSION

CRM has changed tremendously over the past decade. Both new technologies and changing customer behavior have had a great impact on the way companies manage their existing and potential clients. Software vendors include the latest technological innovations in their offerings not only to differentiate themselves from the competition, but also to help their customers better adapt to the changing market.

End users today benefit from Web-based software, which allows them to access the system through a Web browser wherever there is an Internet connection, and they can use their mobile devices to perform daily tasks. Furthermore, through social solutions, they can gather and analyze customer feedback, but also interact, communicate, and collaborate with customers and partners.

Companies can also benefit from functionality—for example, for HR or business process management—that has traditionally not been included with core CRM functionality, reducing the investment required for buying and maintaining separate products.

Whether a company has a need for the types of solutions described in this guide largely depends on how it does business. Though new technologies may be tempting, companies need to consider all the advantages and disadvantages associated with them. In addition, a company should undertake an analysis of the costs and benefits before investing in a CRM solution (for instance, a platform that allows users to customize the product and develop new apps can be a great option, but not if it costs too much and is not used often).

When considering tools and platforms for innovative CRM or extended functionality, companies may be overwhelmed by the plethora of options available. An informed decision regarding the use of such a solution should start with a clear definition of the needs of the company. When companies decide to engage their customers through social media channels, offer them customer support online, promote their products using mobile marketing, and involve people outside the company in product development,

they need to prioritize their undertakings and adjust their focus accordingly. Companies should avoid allocating human and financial resources to activities that may not be the main focus of the company, or that are already well covered using traditional methods (e.g., customer support through e-mail or by phone).

A company should certainly consider adopting innovative tools and solutions to complement core CRM functionality, but only if they can bring something new to the business and its customers.

TEC Resources for CRM

Articles

- [The Lesser-Known \(Social\) Facts about Microsoft Dynamics CRM](#)
- [What All Sales Organizations Need to Know: An Up-close-and-personal Discussion with Blackboard and Salesforce.com](#)
- [Sage ERP and CRM Portfolio Update: Clarity at Last](#)
- [When ERP and CRM Connect in the Cloud](#)

Blog Posts

- [Beware of CRM Innovation for Innovation's Sake](#)
- [Astute Social Relationship Management](#)
- [Inside the Age of Social Enterprise with Salesforce.com](#)
- [CRM: Out of the Box? Or outside the Box?](#)
- [3 Questions You Need to Take More Seriously When Adopting Mobile CRM](#)
- [Has KANA Gotten Its Mojo Back? – Part 1, Part 2](#)
- [RIM Gets the Gist \(of Social Media\)](#)
- [Can Mzinga Really Make You OmniSocial?](#)
- [CRM and BPM: "We Goes Together Like Peas and Carrots"](#)
- [CRM for Manufacturing vs. Regular CRM](#)

Special Reports

- [Vendor Spotlight: KANA Software](#)

Case Studies

- [Global Refund](#)

Software Evaluation Tools

- [Request for Proposal \(RFP\) Templates](#)
- [Software Evaluation Reports](#)
- [TEC Advisor](#)



CASEBOOK

SugarCRM Customer Success Story

USA FACT Drives Higher Revenues with Sugar Professional™ and Empowers Sales On-the-go with Sugar Mobile™

Company Profile Headquarters

Riverside, California, USA

Founded

1977

Company Description

USA FACT offers comprehensive human resources (HR) hiring solutions with Human Resource Information Systems and Applicant Tracking System integration and consulting. Core areas of value include pre-employment background checks, drug screening services, Human Resource System selection and implementation services, and integration solutions for all forms of HR systems.

Solution

Sugar Professional™

Solution Partner

Epicom

“When it comes to CRM customizations, you can accomplish a lot with unlimited funds. The beauty of SugarCRM is that you don't have to break the bank to get what you want.”

Matthew Taylor, President & COO, USA FACT

USA FACT is an Internet-based pre-employment screening company that has been in business for more than 33 years. It represents an array of clients from Fortune 500 companies to nonprofit organizations and processes thousands of reports daily. In early 2010, USA FACT experienced executive management changes with the addition of a new chief executive officer (CEO), Matt Davidson, and president and chief operating officer (COO), Matthew Taylor. Once Davidson and Taylor were on board with USA FACT, they realized its SugarCRM solution was not being managed properly to support its sales and operations groups. As a result, there was low user adoption, its sales team did not have a quote structure in place, managers were unable to track accountability, activities, or profit, and opportunities were falling through the cracks.

Requirements

Davidson and Taylor arrived at USA FACT with extensive backgrounds in working successfully with SugarCRM and its gold-level solutions partner, Epicom. Having previously evaluated other customer relationship management (CRM) solutions against Sugar for various work environments, Davidson knew that with a slight reconfiguration of its Sugar instance, USA FACT would benefit greatly from Sugar's flexibility, cost-effectiveness, and ease of integration. As a result, USA FACT prioritized its requirements to reconfigure its Sugar instance into a performance-based sales platform that could streamline the company's operations and drive growth.

Immediate requirements included customizations to track on a monthly recurring revenue basis and modifications to its quotes module to support standardized product offerings. "From my past experience with Sugar, I knew there was a never-ending amount of potential in the product, in the Sugar community, and especially with its solution partners like Epicom." He continues, "I've never run into a situation with Sugar and Epicom where I was told, 'We can't do that.' The capabilities are endless." And with Sugar Mobile capabilities for the iPhone, USA FACT would now be able to streamline its sales process even further with immediate field access for its agents.

Taylor adds, "When it comes to CRM customizations, you can accomplish a lot with unlimited funds. The beauty of SugarCRM is that you don't have to break the bank to get what you want."

Solution

USA FACT worked with its gold-level SugarCRM partner Epicom to expand its Sugar solution and strengthen the company. The initial changes were sales driven, with functionalities

for its operations team included shortly thereafter. As a result, USA FACT has gained opportunities and improved its quotes modules, Web-to-leads processes, and reporting capabilities.

Benefits

Within less than 12 months of reconfiguring its Sugar Professional solution, USA FACT has significantly streamlined its quotes module and reduced sales cycles from 3–6 months to within the same week of an inbound call. With automated quote generation and standardized volume pricing, an offer that would previously take three people to complete in 30 minutes has been reduced to the work of just one person in less than 5 minutes.

And, while a USA FACT salesperson is in the process of creating a quote, its automated system can indicate possible product upgrades to encourage a deeper level of customer engagement and higher-level purchases. This had led to a 20 percent increase in revenue and a 15 percent increase in contract values. Davidson states, “Our quote customizations have taken our customer interaction to a new level.” He continues, “It allows us to focus on the customer and provide them with many options for cost-effective solutions that grow our business.”

In addition, several other Sugar functionalities including a Web-to-lead module and Sugar Mobile have contributed to overall efficiency at USA FACT. Its Web-to-lead module directly imports Web leads into the appropriate daily and weekly reports so sales agents and managers can seamlessly follow up and develop opportunities. And, with Sugar’s mobile platform on the iPhone, USA FACT’s agents in the field have immediate access to its updated database of sales information. Davidson and his team can now quickly tap into Sugar and access accurate information, from the field, to work directly with the product teams and complete orders. Since pricing updates are standardized across the system, there is no need for management involvement. “Sugar’s iPhone app looks great and has streamlined the sales process for our field team,” says Davidson. “Now that I’m using Sugar Mobile, I can’t ever go back.” As a result, current company growth has been driven by actual revenue increases that were previously elusive. USA FACT has also expanded Sugar Mobile to its operations team to facilitate management and communication throughout the company.

USA FACT has also benefited from the advanced reporting capabilities in Sugar Professional. Its ability to report on its business has improved management and accountability, resulting in more focus and transparency across the company. Executive management is now able to use the same four or five key reports to generate dynamic, individualized end-user reports. These are automatically updated as each team member inputs daily activities and

“Sugar’s iPhone app looks great and has streamlined the sales process for our field team.”

Matthew Taylor, President &
COO, USA FACT

information, reducing the need to manually prepare reports or sort through data. Managers are now able to hold each other responsible without gaps in accountability or progress across multiple departments. And, USA FACT's enhanced culture supports managers being empowered through the transparency SugarCRM creates.

Davidson explains, "Our highest sales number came in the fourth quarter in 2010, once all team members were in place and working in synergy within the application." He continues, "This success wasn't really a surprise, based on my background and experience with SugarCRM."

In months when the industry would typically experience its worst operational costs, USA FACT is now seeing its best overall performance. With one centralized solution for sales, product, and individual case management, USA FACT has streamlined its operations and sales processes, and saved on both time and efficiency. "We use Sugar for everything, from IT bug tracking to case management, sales management, and reporting," Taylor explains. "It's the core of everything we do here."

About USA FACT

USA FACT is an Internet-based eRecruiting technology consulting and employment screening provider offering drug testing, employment screening, tenant screening, driver management services, and technology implementation and integration services across HR applications. With customers in the healthcare, education, insurance, food services, and distribution/transportation industries, USA FACT is experienced with standardized screening methods for both small and large companies.

About Epicom

Epicom is a proven business problem solver with extensive experience customizing, implementing, and supporting SugarCRM systems in diverse industries, for both domestic and international clients. Our customers range from tiny (five users and less than \$1 million [USD] in revenue) to huge (more than 38,000 employees and \$6.5 billion [USD] in annual revenue).



VENDOR DIRECTORY

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
5th Finger USA	www.5thfinger.com newbiz@5thfinger.com	+1 415-294-2040	@5thFinger			x		
AbleBridge USA	www.ablebridge.com See online form	1-877-600-2253	@AbleBridge	x				x
Accept360 USA	www.accept360.com info@accept360.com	1-866-423-8376	@accept360					x
Adage Technologies USA	www.adagetechnologies.com See online form	+1 312-258-1200				x		x
Adapt USA	www.adaptcrm.com See online form	+1 714-389-1584		x				x
Adito Germany	www.adito.de info@adito.de	+49 8743 9664-0	@adito_software	x		x		
Adobe USA	www.adobe.com/marketing/	+1 408-536-6000 1-888-649-2990						x
Advanced Solutions International USA	www.advsol.com info@advsol.com	1-800-727-8682	@advsol	x	x	x		x
Allegiance USA	www.allegiance.com support@allegiance.com	+1 801-617-8000 1-866-794-4785	@allegiancetweet		x		x	x
Alterian UK	www.alterian.com bristol@alterian.com	+44 117 970 3200	@Alterian				x	x
Amdocs USA	www.amdocs.com See online form	+1 314-212-7000	@AmdocsInc		x		x	x
Antenna USA	www.antennasoftware.com info@antennasoftware.com	+1 201-239-2300 1-888-723-2832				x		
Aplicor USA	www.aplicor.com See online form	+1 561-347-0300	@aplicor	x	x			x
AppShore USA	www.appshore.com sales@appshore.com		@AppShore	x	x			
Aprimo USA	www.aprimo.com info@aprimo.com	+1 317-814-6465	@aprimo		x			x
APT Solutions UK	www.aptolutions.net enquiries@aptolutions.co.uk	+44 1952 214000						x
Artificial Solutions The Netherlands	www.artificial-solutions.com See online form	+31 35 646 26 02	@ArtiSol		x	x		x
Astute Solutions USA	www.astutesolutions.com info@astutesolutions.com	+1 614-508-6100	@astutesolutions	x	x		x	
Attensity USA	www.attensity.com sales@attensity.com	+1 650-433-1700 1-800-721-0560	@attensity		x		x	
Attentio Belgium	www.attentio.com attentiocontact@attentio.com	+32 221 84 226	@Attentio		x		x	
AuraPortal USA	www.auraportal.com info@auraportal.com	+1 781-569-5940	@AuraPortal_en	x	x			x
Autonomy UK	www.autonomy.com autonomy@autonomy.com	+44 1223 448000	@AutonomyCorp		x		x	x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Avankia USA	www.avankia.com sales@avankia.com	+1 615-371-6191 1-877-739-2818			x			x
Avaya USA	www.avaya.com See online form	+1 908-953-6000 1-866-462-8292	@Avaya		x	x		x
Avidian Technologies USA	www.avidian.com See online form	+1 206-686-3001 1-800-399-8980	@crm_provider	x	x	x		
Avtex USA	www.avtex.com sales@avtex.com	+1 952-831-0888 1-800-323-3639	@avtex	x	x	x	x	x
Axios Systems USA	www.axiossystems.com assystus@axiossystems.com	+1 703-326-1357			x			x
Azorus Canada	www.azorus.com info@azorus.com	+1 902-446-4500 x8031 1-866-746-4500 x8031	@azorus				x	x
Backbase USA	www.backbase.com sales-us@backbase.com	+1 646 205 3648	@backbase			x	x	x
Badgeville USA	www.badgeville.com See online form		@badgeville				x	x
BatchBlue USA	www.batchblue.com info@batchblue.com	1-888-402-2824	@batchbook			x	x	
Bazaarvoice USA	www.bazaarvoice.com See online form	+1 512-551-6000 1-866-522-9227	@Bazaarvoice		x		x	x
BigDoor USA	www.bigdoor.com info@bigdoor.com	+1 425-296-0805	@bigdoor		x		x	
Blackboard USA	www.blackboard.com See online form	+1 202-463-4860 1-800-424-9299 x4	@Blackboard					x
BlueCamroo Canada	www.bluecamroo.com See online form		@bluecamroo	x			x	x
Bluespring Software USA	www.bluespringsoftware.com info@bluespringsoftware.com	+1 513-794-1764 1-877-794-1764						x
BMC Software USA	www.bmc.com See online form	+1 713-918-1371 1-800-841-2031	@bmcsoftware		x			x
Bomgar USA	www.bomgar.com info@bomgar.com	+1 601-519-0123 1-877-826-6427	@Bomgar		x	x		x
BPMonline UK	www.bpmonline.com info@bpmonline.com	+44 20 8816 8320	@bpmonline	x	x			x
C3i Inc USA	www.c3i-inc.com sales@c3i-inc.com	+1 973-401-6000 1-866-327-6234	@C3i_Inc					x
CallidusSoftware USA	www.callidussoftware.com info@callidussoftware.com	+1 925-251-2200 1-866-812-5244	@CallidusSPM	x	x			x
Cambrian House Canada	www.cambrianhouse.com press@cambrianhouse.com	+1 403-263-2655 1-877-263-7775	@chaordix				x	x
Cameleon Software USA	www.cameleon-software.com See online form	+1 847-583-8450	@CameleonSW		x			x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
CAS Software Germany	www2.cas.de info@cas.de	+49 721 9638-188	@CASSoftware	x				x
CDC Software USA	www.cdcsoftware.com info@cdcsoftware.com	+1 770-351-9600	@CDC_Software	x		x	x	
Cegedim RM France	crm.cegedim.com See online form	+33 1 49 09 22 00	@CegedimRM		x	x		x
Cellit USA	www.cellit.com sales@cellit.com	+1 312-985-0800 1-800-790-6597	@cellit			x		
Cision Sweden	www.cision.com info.intl@cision.com	+46 8 507 410 00					x	x
Clarabridge USA	www.clarabridge.com See online form	+1 571-299-1800	@Clarabridge				x	x
CloudCaptive USA	www.cloudcaptive.com sales@cloudcaptive.com	+1 805-328-4440	@CloudCaptive				x	x
Cmaeon Canada	www.cmaeon.com info@cmaeon.com	+1 250-386-4266 1-877-621-4266	@cmaeon		x			x
Collaborate Cloud USA	www.collaboratecloud.com See online form	+1 707-206-6596			x			x
Collective Intellect USA	www.collectiveintellect.com See online form	+1 720-259-3600	@Collectual				x	x
Commence USA	www.commence.com See online form	+1 732-380-9100 1-877-266-6362	@CommenceCorp	x	x			
Conarc USA	www.conarc.com dstaveley@conarc.com	+1 770-849-0508	@conarc	x		x		x
ConfirmIt Norway	www.confirmit.com info@confirmit.com	+47 21 502 500 1-888-801-2347	@confirmit		x			x
Connotate USA	www.connotate.com info@connotate.com	+1 732-296-8844	@connotate		x		x	
Consona USA	www.consona.com info@consona.com	+1 317-249-1700 1-888-826-6766	@ConsonaCorp		x			x
Convergys USA	www.convergys.com See online form	+1 513-723-7000 1-888-284-9900	@convergys		x			x
Cosential USA	www.cosential.com dcornish@cosential.com	1-800-505-7089	@Cosential	x				x
Covisint USA	www.covisint.com See online form	+1 313-227-1700 1-888-222-1700	@covisint		x		x	x
CRMG USA	www.crmguaranteed.com sales@crmguaranteed.com	1-877-645-2694		x				x
CrownPeak USA	www.crownpeak.com See online form	+1 310-841-5920 1-800-887-1944	@CrownPeak		x			x
CureCRM USA	www.curecrm.com founders@curecrm.com	+1 415-683-0579	@CureCRM			x		x
Customer1 Canada	www.customer1.com contactus@customer1.com	+1 416-572-2456 1-866-825-1268	@Customer1CRM					x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Cymfony USA	www.cymfony.com info@cymfony.com	+1 617-912-2828	@Cymfony				x	
D&B USA	www.dnb.com See online form	+1 973-921-5500 1-888-347-0475	@DnBUS		x	x		x
Decipher USA	www.decipherinc.com info@decipherinc.com	+1 559-436-6940 1-800-923-5523	@deciphertweets		x			
Demand Media USA	www.demandmedia.com See online form	+1 310-394-6400	@demandmedia		x		x	x
Dexrex USA	www.dexrex.com See online form		@dexrexllc			x		
Direxxis USA	www.direxxismarketing.com info@direxxismarketing.com	+1 781-444-7900	@DIREXXISdmEDGE		x			x
Dovetail USA	www.dovetailsoftware.com info@dovetailsoftware.com	+1 512-610-5400 1-800-684-2055	@Dovetail		x	x		x
Ebix CRM USA	www.ebixcrm.com dave.smith@ebix.com	1-800-777-9188	@EbixSmartOffice	x				x
EBSuite USA	www.ebsuite.com sales@ebsuite.com	+1 415-468-5800 1-888-276-3270	@EBSuite	x	x	x		x
edocr UK	www.edocr.com sales@edocr.com	+44 776 973 4491	@edocr		x			x
eGain USA	www.egain.com sales@egain.com	+1 408-636-4500 1-888-603-4246	@eGain		x	x	x	x
eGrabber USA	www.egrabber.com info@egrabber.com	+1 408-872-3100 1-866-299-7314	@egrabber					x
ELK Software USA	www.shortsalecommander.com See online form	1-800-658-3420						x
Eloqua USA	www.eloqua.com sales@eloqua.com	1-866-327-8764	@Eloqua		x			x
emailvision USA	www.emailvision.com See online form	+1 212-257-6018	@EmailvisionUSA		x	x	x	x
EnterpriseWizard USA	www.enterprisewizard.com sales@enterprisewizard.com	+1 650-587-8615 x1 1-888-727-2209 x1		x	x			x
ENTP USA	www.tenderapp.com courtenay@entp.com	+1 503-877-3687	@tenderapp		x			x
Entrepids Mexico	www.entrepids.com contacto@entrepids.com	+52 55 5533 7333	@CRMeCommerceSFA	x	x			x
Envision USA	www.envisioninc.com See online form	+1 206-225-0800	@envisioninc					x
Eptica UK	www.eptica.com See online form	+44 1223 370 100	@EpiticaUK				x	x
eSalesTrack USA	www.esalestrack.com sales@esalestrack.com	+1 913-647-5900 1-866-765-4276	@eSalesTrack	x	x	x		
eXensys India	www.exensys.com info@exensys.com	+91 40 23392440	@exensys	x				x

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Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
eZ Systems Norway	www.ez.no info@ez.no	+47 35 58 70 20	@ezcommunity					x
Fliptop USA	www.fliptop.com sales@fliptop.com	+1 415-671-4710 1-888-373-7533	@Fliptop				x	
Free CRM USA	www.freecrm.com See online form	+1 415-874-8040 1-866-829-7011		x	x			
FrontRange Solutions USA	www.frontrange.com See online form	+1 925-398-1800 1-800-776-7889	@frontrange	x	x	x		x
FuzeDigital USA	www.fuze.com See online form	+1 425-649-1246 1-866-631-0188	@FuzeDigital		x		x	
Geodesic India	www.geodesic.com enquires@geodesic.com	+91 22 2831 1849	@GeodesicLtd					x
Gist USA	www.gist.com gist_info@rim.com	+1 206-453-0381	@Gist			x	x	
Go2Group USA	www.go2group.com sales@go2group.com	+1 410-879-8102 1-877-442-4669	@Go2Group					x
hearforward USA	www.hearforward.com See online form		@hearforward				x	x
Helpdesk Pilot USA	www.helpdeskpilot.com See online form	+1 917-720-3199			x			x
High 5 Software USA	www.high5software.com sales@high5software.com	1-360-293-3000 1-800-585-1696		x		x		x
Hornbill UK	www.hornbill.com See online form	+44 208 582 8282						x
HubSpot USA	www.hubspot.com See online form	1-888-482-7768	@HubSpot				x	x
IBM USA	www.ibm.com askibm@vnet.ibm.com	+1 914-499-1900 1-800-426-4968			x	x	x	x
iCongo Canada	www.icongo.com info@icongo.com	+1 514-866-2664 1-888-944-2664				x		x
Idea2 USA	www.idea2.com See online form	+1 303-951-4209	@idea2me		x			x
IdeaScale USA	www.ideascale.com See online form	1-800-549-9198	@ideascale		x			x
iEnterprises USA	www.ienterprises.com sales@ienterprises.com	+1 908-679-0000 1-800-741-5597		x		x		
iLoop Mobile USA	www.iloopmobile.com See online form	+1 408-907-3360	@iloopmobile			x		x
Impel CRM India	www.impelcrm.in info@impelcrm.in	+91 80 3008 0000	@impelcrm	x	x			
inContact USA	www.incontact.com info@inContact.com	+1 866-965-7227 1-866-965-7227	@inContact		x			x
InfinityInfoSystems USA	www.infinityinfo.com See online form	+1 212-563-4400 1-800-354-4228	@InfinityInfo			x		x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Infor USA	www.infor.com info@infor.com	+1 678-319-8000 1-800-260-2640	@Infor	x				x
Inforica Canada	www.inforica.com information@inforica.com	+1 905-602-0686						x
Infosys India	www.infosys.com askus@infosys.com	+91 80 2852 0261	@Infosys			x	x	x
InfusionSoft USA	www.infusionsoft.com sales@infusionsoft.com	1-866-800-0004	@Infusionsoft	x	x			
INgage Networks USA	www.ingagenetworks.com sales@ingagenetworks.com	+1 239-513-0092 1-866-591-6837	@INgageNetworks		x		x	x
Innocentive USA	www.innocentive.com See online form	+1 978-482-3300 1-866-812-7339	@InnoCentive					x
Inquisite USA	www.inquisite.com See online form				x			x
InsideAxis USA	www.insideaxis.com See online form	+1 650-539-5590	@InsideAxis		x	x		x
InsideView USA	www.insideview.com sales@insideview.com	+1 415-728-9340	@insideview				x	x
Insightly	www.insight.ly email@insight.ly		@insightlyapp		x			x
Intelestream USA	www.intelestream.net info@intelestream.net	1-800-391-4055	@Intelestream	x	x		x	
Intelisis Mexico	www.intelisis.com info@intelisis.com	+52 55 5081 1212	@intelisismexico	x	x			
InteractCRM India	www.interactcrm.com mumbai@interactcrm.com	+91 22 40553055	@InteractCRM					x
Interactive Intelligence USA	www.inin.com interact@inin.com	+1 317-872-3000 1-800-267-1364	@IN_Intelligence		x			x
Jacada USA	www.jacada.com info@jacada.com	+1 770-352-1300	@Jacada_inc		x			x
JitterJam USA	www.jitterjam.com info@jitterjam.com	+1 603-782-4545	@jitterjam		x		x	x
Jive Software USA	www.jivesoftware.com See online form	+1 503-295-3700 1-877-495-3700	@JiveSoftware		x	x	x	x
Juniper Networks USA	www.juniper.net See online form	+1 408-745-2000 1-888-586-4737	@JuniperNetworks			x		
KANA USA	www.kana.com See online form	+1 650-614-8300 1-800-737-8738	@KANASoftware		x		x	x
KarmaCRM USA	www.karmacrm.com See online form	+1 734-931-0116	@karmaCRM	x	x	x		
Kinesis Survey USA	www.kinesisurvey.com See online form	+1 512-590-8300	@Kinesis_Survey		x	x		x
Knovial USA	www.knovial.com mfrancis@knovial.com	1-866-255-3832	@knovial	x	x		x	x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
KnowledgeWire UK	www.knowledgewire.co.uk info@knowledgewire.co.uk	+44 845 094 5669						x
Kyliptix USA	www.kyliptix.com sales@kyliptix.com	+1 949-777-6940 1-866-448-4230		x	x			x
LANDesk USA	www.landesk.com sales@landesk.com	+1 801-208-1500 1-800-982-2130	@LANDesk		x			x
Legrand CRM Australia	www.legrandcrm.com info@legrandcrm.com	+61 2 8667 1500 1-888-361-0611						x
LexisNexis USA	www.interaction.com sales@interaction.com	+1 630-572-1400	@LexisNexis	x	x			x
Liferay USA	www.liferay.com sales@liferay.com	1-877-543-3729	@Liferay				x	
Limelight Networks USA	www.limelight.com See online form	+1 602-850-5000 1-866-200-5463	@llnw		x	x		x
Lithium USA	www.lithium.com See online form	+1 510-653-6800	@LithiumTech		x		x	x
LogMeIn USA	www.logmein.com See online form	+1 781-638-9050 1-866-478-1805	@LogMeIn			x		x
LongJump USA	www.longjump.com See online form	1-800-886-9028	@longjump	x	x			x
Luxor CRM Canada	www.luxorcrm.com See online form	+1 416-613-9110	@LuxorCRM	x	x	x		
M4 Systems UK	www.m4systems.com sales@m4systems.com	+44 1443 863910	@M4Systems	x	x	x		
Magento USA	www.magentocommerce.com See online form		@magento		x	x		x
Market Force USA	www.marketforce.com See online form	+1 303-402-6920	@MarketForce				x	x
Market Metrix USA	www.marketmetrix.com See online form	+1 415-526-4680	@marketmetrix		x			x
MarketingPilot USA	www.marketingpilot.com sales@marketingpilot.com	+1 847-864-4777	@MarketingPilot		x			x
MarketLive USA	www.marketlive.com info@marketlive.com	1-877-341-5729	@MarketLiveInc		x	x	x	x
Marketo USA	www.marketo.com See online form	+1 650-376-2300 1-877-260-6586	@marketo		x	x	x	x
MarketTools USA	www.markettools.com info@markettools.com	+1 415-957-2200 1-888-396-6014	@MarketTools		x		x	x
Marqui Canada	www.marqui.com sales@marqui.com	1-888-662-7784	@Marqui_CMS		x			x
Mavenlink USA	www.mavenlink.com support@mavenlink.com	+1 946-336-7610	@mavenlink		x			x
Maximizer Software Canada	www.maximizer.com See online form	1-800-804-6299	@MaximizerCRM	x	x	x		x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Medallia USA	www.medallia.com See online form	+1 650-321-3000	@Medallia		x	x		x
Meltwater Group USA	www.meltwater.com See online form	+1 415-829-5900 1-877-635-8928	@MeltwaterGroup		x		x	x
Microsoft USA	crm.dynamics.com	1-877-276-2464	@MSDynamicsCRM	x	x	x	x	x
MicroStrategy USA	www.microstrategy.com info@microstrategy.com	+1 703-848-8600	@microstrategy					x
Misoft Systems Romania	www.misoft-systems.net info@misoft-systems.net	+40 264 437 615	@misoftsystems	x	x	x		
MitoKen India	www.mitoken.com info@mitoken.com	+91 80 26484877						x
MobileIron USA	www.mobileiron.com See online form	+1 650-919-8103 1-877-819-3451	@mobileiron		x	x		
Mothernode USA	www.mothernode.com sales@mothernode.com	+1 214-960-4581 1-800-928-6055	@Mothernode	x	x			
Motivity Solutions USA	www.motivolutions.com lisa@motivolutions.com	1-800-411-5541		x	x			x
Moxie Software USA	www.moxiesoft.com See online form	+1 650-294-4680 1-800-474-1149	@MoxieSoft		x		x	x
MyBusiness	www.mybusiness-crm.com sales@mybusiness-crm.com	+44 20 3286 8390	@mybusiness_crm	x	x			x
MyBuys USA	www.mybuys.com info@mybuys.com	+1 650-544-2400 1-888-291-2422	@MyBuys		x	x		x
Mzinga USA	www.mzinga.com learnmore@mzinga.com	1-888-694-6428	@mzinga		x		x	x
Neocase Software France	www.neocasesoftware.com See online form	+33 1 73 60 01 10 1-877-383-0400			x			x
Neolane France	www.neolane.com info@neolane.fr	+33 1 41 98 35 35	@Neolane		x		x	x
NetProspex USA	www.netprospex.com sales@netprospex.com	1-888-826-4877	@NetProspex		x			x
NetSuite USA	www.netsuite.com info@netsuite.com	+1 650-627-1000 1-877-638-7848	@netsuite	x	x	x		x
NextApplication France	www.nextapplication.com See online form	+33 1 56 60 54 29			x	x		x
Nimble USA	www.nimble.com info@nimble.com		@Nimble		x	x	x	
Nirvaha USA	www.oneclickcommissions.com info@oneclickcommissions.com	1-855-512-5425	@Nirvaha_Corp		x			x
Norada Canada	www.norada.com customercare@norada.com	+1 650-331-7336 1-800-738-9961	@solve360		x			x
Numara USA	www.numarasoftware.com See online form	1-800-557-3031	@numara_software		x	x		x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Offerpop USA	www.offerpop.com See online form		@offerpop				x	
Oncontact Software USA	www.oncontact.com info@oncontact.com	+1 262-375-6555 1-800-886-0866	@OncontactCRM	x	x	x		
OneSource USA	www.onesource.com See online form	+1 978-319-4300 1-866-354-6936	@Infogroup		x			x
Openbox USA	www.openbox.net info@openbox.net	1-877-361-6536		x	x			x
OpenCRM UK	www.opencrm.co.uk See online form	+44 8452 303083	@OpenCRM	x	x			x
OpenText Canada	www.opentext.com sales@opentext.com	+1 519-888-7111 1-800-499-6544	@OpenText		x		x	x
Oracle USA	crmondemand.oracle.com oraclesales_us@oracle.com	+1 650-506-7000 1-800-633-0738	@OracleCRM	x	x	x		x
Orbis Software UK	www.orbis-software.com enquiries@orbis-software.com	+44 1202 241115	@TaskCentre					x
Parature USA	www.parature.com sales@parature.com	+1 703-564-7758 1-877-467-2728	@Parature		x		x	x
Pardot USA	www.pardot.com sales@pardot.com	+1 404-492-6845	@Pardot		x	x		x
Pegasystems USA	www.pegacom See online form	+1 617-374-9600	@pegasystems		x			x
PerfectView The Netherlands	www.perfectviewcrm.nl info@perfectview.nl	+31 887 751 310	@PerfectView	x	x			
PhaseWare USA	www.phaseware.com sales@phaseware.com	+1 214-432-9043 1-866-616-6629	@PhaseWare		x	x		x
Pitney Bowes Business Insight USA	www.pbinsight.com pbbi.sales@pb.com	1-800-327-8627	@pitneybowes		x			x
PlanPlus Online USA	www.planplusonline.com sales@planplusonline.com	+1 801-438-3460 x2020	@PlanPlus	x	x	x		x
Planmill Finland	www.planmill.com sales@planmill.com	+358 10 322 9110	@PlanMill	x	x			x
Presence Technology Spain	www.presenceco.com info@presenceco.com	+34 93 10 10 300	@PresenceTech		x		x	x
ProspX USA	www.prospx.com sales@prospx.com	+1 512-419-9970	@ProspX		x			x
ProTrak International USA	www.protrak.com sales@protrak.com	+1 212-265-9833				x		x
PTC USA	www.ptc.com	+1 781-370-5000	@PTC_Creo					x
QlikTech USA	www.qlikview.com See online form	1-888-828-9768	@QlikView					x
Quaero USA	quaero.csgi.com quaeroinfo@csgsystems.com	+1 303-796-2850 1-877-570-2199	@CSG_Quaero		x			x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
Quantivo USA	www.quantivo.com sales@quantivo.com	+1 510-338-6100	@Quantivo		x			x
Rapportive USA	www.rapportive.com supportive@rapportive.com		@rapportive				x	
Raptive USA	www.raptive.com info@raptive.com		@raptive				x	x
Responsys USA	www.responsys.com info@responsys.com	+1 650-745-1700 1-800-624-5356	@Responsys		x	x	x	x
Rhomobile USA	www.rhomobile.com info@rhomobile.com	+1 408-572-8076 1-877-746-0334	@rhomobile		x	x		
Ribbit USA	www.ribbit.com See online form	1-800-474-2247			x	x		x
RightNow* USA	www.rightnow.com See online form	+1 406-522-4200 1-866-630-7669	@RightNowNews		x	x	x	x
Research In Motion Canada	www.rim.com help@rim.com	+1 519-888-7465				x		
RTI Software USA	www.rti-software.com hmp@harrisdata.com	+1 262-754-2954 1-800-225-0585		x	x			x
Saepio USA	www.saepio.com sales@saepio.com	+1 816-777-2100 1-877-468-7613	@saepio		x			x
Sage USA	www.sagesoftware.com See online form	+1 480-383-5200 1-800-643-6400	@wwwSageCRMcom	x	x	x		
Salesboom Canada	www.salesboom.com sales@salesboom.com	+1 902-482-9237 1-877-276-7253	@SalesboomNews		x			x
SalesCentric USA	www.salescentric.com info@salescentric.com	+1 949-682-3997		x	x			x
Salesforce.com USA	www.salesforce.com info@salesforce.com	+1 415-901-7000 1-800-667-6389	@salesforce	x	x	x	x	x
SalesFusion USA	www.salesfusion.com sales@salesfusion.com	+1 770-217-1228 1-800-558-1760			x		x	x
Salesnet USA	www.salesnet.com See online form	1-866-732-8632	@Salesnet	x	x	x		
SalesNexus USA	www.salesnexus.com sales@salesnexus.com	+1 713-862-0001 1-800-862-0134	@SalesNexus	x	x			
SalesPage USA	www.salespage.com sales@salespage.com	+1 269-567-7400		x				x
SAP Germany	www.sap.com See online form		@sapcrm	x		x		
SAS USA	www.sas.com See online form	+1 919-677-8000 1-800-727-0025	@SASanalytics					x
Satmetrix USA	www.satmetrix.com See online form	+1 650-227-8300 1-888-800-2313	@Satmetrix		x			x
Savo USA	www.savogroup.com See online form	+1 312-506-1700 1-877-542-7266	@SAVO_Group		x	x		

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
ScriptLogic USA	www.helpdesksoftware.com sales@scriptlogic.com	+1 561-886-2400 1-800-813-6415	@ScriptLogic					x
Sedona Corporation USA	www.sedonacorp.com info@sedonacorp.com	1-800-815-3307			x			x
Selligent Belgium	www.selligent.com info@selligent.com	+32 2 808 89 09	@selligent	x	x			x
SemaTree USA	www.sematree.com sales_rep@sematree.com	+1 978-516-2015		x				x
ServiceNow USA	www.service-now.com info@service-now.com	+1 858-720-0477	@servicenow		x			x
Silverpop USA	www.silverpop.com contactsales@silverpop.com	+1 678-247-0500 1-866-745-8767	@Silverpop	x	x		x	x
SiSense USA	www.sisense.com sales@sisense.com	+1 607-821-0629	@SiSense		x			x
Sitecore USA	www.sitecore.net sales-us@sitecore.net	+1 415-380-0600	@Sitecore		x	x		x
Soffront USA	www.soffront.com marketing@soffront.com	+1 510-413-9000 1-800-763-3766	@soffront	x	x	x		
SoftSyl Technologies USA	www.softsyl.com info@softsyl.com	+1 614-423-5412	@SoftSyl		x			x
Sophos UK	www.sophos.com sales@sophos.com	+44 8447 671131 1-866-866-2802				x		
SOTI Canada	www.soti.net sales@soti.net	+1 905-624-9828 1-888-624-9828	@SOTI_Inc		x	x		
Spigit USA	www.spigit.com info@spigit.com	1-855-774-4481	@Spigit		x	x	x	
StayinFront USA	www.stayinfront.com See online form	+1 973-461-4800 1-800-422-4520	@StayinFront		x	x		x
SugarCRM USA	www.sugarcrm.com sales@sugarcrm.com	+1 408-454-6940 1-877-842-7276	@sugarcrm	x	x	x	x	x
SuperOffice Norway	www.superoffice.com See online form	+47 23 35 40 00		x	x	x		
Surado USA	www.suradocrm.com See online form	+1 951-682-4895 1-800-478-7236	@SuradoCRM	x	x			
Sword Ciboodle USA	www.sword-ciboodle.com See online form	+1 312-447-5600	@Sword_Ciboodle		x		x	x
Syclo USA	www.syclo.com info@syclo.com	+1 847-230-3800 1-800-567-9256	@syclomobile			x		
Sysomos Canada	www.sysomos.com contact@sysomos.com	+1 416-479-0629 1-866-483-3338	@sysomos				x	x
Talend USA	www.talend.com sales@talend.com	+1 650-539-3200	@talend		x			x
Tealeaf USA	www.tealeaf.com See online form	+1 415-495-8000	@tealeaf		x	x	x	x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
TechExcel USA	www.techexcel.com sales@techexcel.com	+1 925-871-3900 1-800-439-7782	@TechExcel		x			x
Teleca Sweden	www.teleca.com info@teleca.com	+46 40 25 30 00	@TelecaMobile			x		
Telligent USA	www.telligent.com See online form	+1 972-407-0688 1-877-492-9484	@telligent		x	x	x	x
ThinkSoftwares India	www.thevisionworld.com sales@thevisionworld.com	+1 408-914-2635	@visionhelpdesk		x			x
Thought Farmer Canada	www.thoughtfarmer.com sales@thoughtfarmer.com	+1 604-566-8300 1-888-694-3999	@thoughtfarmer				x	x
TIBCO USA	www.tibco.com mds@tibco.com	+1 650-846-1000 1-800-420-8450	@TIBCO		x		x	x
TimeLinx USA	www.timelinxsoftware.com sales@timelinxsoftware.com	+1 978-662-1171				x		x
Unica USA	www.unica.com See online form	+1 781-839-8000 1-866-277-7488	@Unica		x			x
Utopy USA	www.utopy.com See online form	+1 415-621-5700 1-866-448-8679	@Utopyinc		x			x
Velaro USA	www.velaro.com sales@velaro.com	1-800-983-5276	@Velaro_Inc		x			x
Velocity Integrations USA	www.velocityintegrations.com sales@velocityintegrations.com	+1 518-720-3020 1-866-539-1358						x
Vienna Advantage India	www.viennaadvantage.com See online form	+91 522 2398945	@viennaadvantage		x			x
Vertical Marketing, Inc. USA	www.salesteam.com sales@vermar.com	+1 703-367-9571 1-855-462-7639						x
Vmware Zimbra USA	www.zimbra.com See online form	+1 650-427-5799 1-888-228-7609	@Zimbra		x			x
Vovici USA	www.vovici.com sales@vovici.com	+1 703-481-9326 1-800-787-8755	@vovici		x			x
vtiger India	www.vtiger.com info@vtiger.com	+91 80 23146984 1-877-784-9277	@vtigercrm					
Wavelink USA	www.wavelink.com See online form	+1 801-316-9000	@Wavelink	x	x	x		
webCRM UK	www.webcrm.com sales.uk@webcrm.com	+44 845 305 8222		x	x	x		
Workbooks UK	www.workbooks.com sales@workbooks.com	+44 118 3030 100	@Workbooks	x	x			
WORKetc Australia	www.worketc.com See online form	1-800-322-7860	@WORKetc		x	x		x
WorldAPP USA	www.worldapp.com info@worldapp.com	+1 781-849-8118 1-888-708-8118	@WorldAPP		x			x
xactly USA	www.xactlycorp.com See online form	+1 408-977-3132 1-866-469-2285	@XactlyCorp		x			x

Vendor Directory

Vendor Headquarters	Web site E-mail	Telephone Toll-free	Twitter	Core CRM	Cloud	Mobile	Social	Extended
XeeMe USA	xeeme.com See online form	+1 650-251-4002				x	x	
Yireo The Netherlands	www.yireo.com See online form		@yireo					x
Zendesk USA	www.zendesk.com See online form	+1 415-418-7506 1-888-670-4887	@Zendesk		x	x		x
Zenprise USA	www.zenprise.com sales@zenprise.com	1-888-936-7747	@Zenprise_Inc		x	x		
Zoho USA	www.zoho.com info@zohocorp.com	+1 925-924-9500	@zoho	x	x	x		x

*On October 24, 2011, Oracle entered into an agreement to acquire RightNow.



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Montreal, Quebec
Canada, H3C 1L5

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Fax: +1 514-954-9739

E-mail: buyersguide@technologyevaluation.com

Web site: www.technologyevaluation.com

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