

# Marketing CRM and Collaboration Software Evaluation and Analysis

Evaluation for Lupa Solutions

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Phase 1: Initial Evaluation List, Short list approach review.



# Evaluation Methodology

- Requirements
  - Features
  - Budget
- Preliminary Assessment
  - Top 40 Universe List for consideration
- Shortlist using Gartner Group Magic Quadrant overlay for Lupa Solutions' specific needs
  - Pre-evaluate top 5 applications
- Weight-factor scoring and ranking



# Requirements

- Features:
  - List Given for Must Have/ Wants
    - TBD – waiting for Matthew Dundon/team feedback.
  - For use with Lupa's clients with respect to their customers (B2C)
    - Content management, email marketing, analytics, contacts and sales management
- Budget:
  - \$30,000 USD/year; Total Cost of Ownership to be \$50-60k/year; prefer less
  - Equivalent to \$2,500/month for all users/seats



# Top 42 Applications (Long list)

- Act!
- Aptean
- Base CRM
- blueCamroo
- Bpm online
- C2CRM
- Campaigner
- Claritysoft
- ClickHQ
- Commence
- Goldmine
- Gold-vision
- Highrise
- Hubspot
- Info CRM
- InfoFlo
- Infusionsoft
- Insightly
- Leadmaster
- Maximizer
- Microsoft Dynamics
- Netsuite CRM+
- Nimble
- Nutshell
- OnContact
- Oracle CRM OnDemand
- Pegasystems
- Pipedrive
- PipelineDeals
- Pipeliner
- Prophet
- Sage CRM
- Salesforce Sales Cloud
- Salesnet
- Salesnexus
- SAP
- Soffront
- SugarCRM
- Work[etc]
- Workbooks
- ZohoCRM
- Zendesk

# Shortlist: Leaders, Challengers

- Leaders: Most trusted, capable, innovative
- Challengers: challenge for leadership
- Visionaries – great vision but does not fully execute
- Niche Players – value, specific focus but lacks full breath/depth of vision and execution

Figure 1. Magic Quadrant for the CRM Customer Engagement Center



Source: Gartner (May 2016)

As of May 2016



# Shortlist

- Based on budget, all top 40 applications remain viable with most apps costing between \$25-75/mo/user. At the top end, (\$/mo/user; +10 user cost): **(red within Gartner MQ)**

• Hubspot (free)	\$200/mo-800/mo	\$24,000/year
• <b>Pegasystems</b>	<b>\$200/mo/user</b>	<b>\$24,000/year</b>
• Infusionsoft	\$199/mo/user	\$23,880/year
• Netsuite CRM	\$129/mo/user	\$15,480/year
• <b>Salesforce w/Mobile</b>	<b>\$125/mo/user</b>	<b>\$15,000/year</b>
• <b>Salesforce</b>	<b>\$75-300/mo/user</b>	<b>\$9,000/year</b>
• <b>Oracle CRM OnDemand</b>	<b>\$75/mo/user</b>	<b>\$9,000/year</b>
• <b>Microsoft Dynamics</b>	<b>\$65/mo/user</b>	<b>\$7,800/year</b>
• SugarCRM	\$65/mo/user	\$7,800/year
• <b>Zendesk</b>	<b>\$49/mo/user</b>	<b>\$5,880/year</b>

# Recommendation For Features

## Weight-Factor Analysis

- Performance leadership, extensibility for future needs, features, integration (w/requirement to spend less)
  - #1 - Salesforce \$75-125/mo/user
  - #2 - Oracle CRM On Demand \$75/mo/user
- Value, less robust, but still a leading product
  - #3 - Zendesk \$49/mo/user
- Niche product for
  - #4 SugarCRM \$65/mo within Gartner Niche players
- Lowest Cost Option
  - #5 BPMonline \$25/mo within Gartner Niche players





# Features Analysis

- Features “Must Haves” (9-10)
  1. Reports & Dashboards
  2. Mobile CRM, mobile apps and alerts
  3. Email client integration (outlook, gmail)
  4. Workflow and approvals
  5. Role based views
  6. Collaboration software integration
- “Wants” (6-8)
  - Sales data, file storage, sync, share
  - Partner management
  - Contact management
  - Sales team and customer opportunity management
  - Sales analytics
  - Sales collaboration
- Others (0-5)



# Results

“Must Haves”

- #1 Salesforce
- #2 Oracle
- #3 SugarCRM

- Only 3 apps met all 6 must-have requirements.

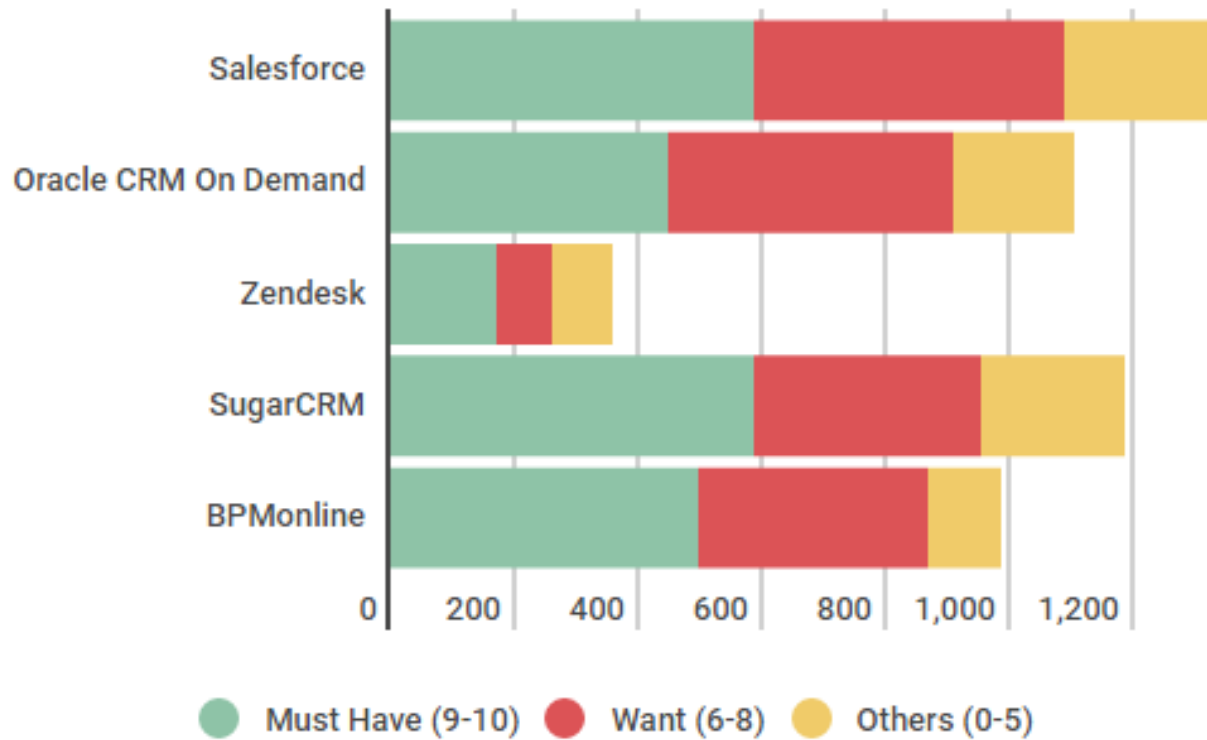
Salesforce	Oracle	Zendesk	SugarCRMBP	Monline
100	100	100	100	100
100	100	0	100	100
100	100	70	90	100
100	50	0	100	100
100	50	0	100	0
90	50	0	100	100
80	80	0	72	64
80	80	0	0	0
70	70	56	70	70
70	70	0	56	70
70	56	0	56	56
70	70	35	56	56
63	35	0	56	56

# Results

- Overall Score and Ranking

				Salesforce	Oracle	Zendesk	SugarCRM	BPMonline
<b>Must Haves (9-10)</b>			600	590	450	170	590	500
				98%	75%	28%	98%	83%
<b>Wants (6-8)</b>			510	503	461	91	366	372
				99%	90%	18%	72%	73%
<b>Other (5-0)</b>			270	256	195	100	234	116
				95%	72%	37%	87%	43%
<b>Total</b>		total	1380	1349	1106	361	1190	988
		max		98%	80%	26%	86%	72%
		<b>Rank</b>		<b>1</b>	<b>3</b>		<b>2</b>	

# CRM Performance Comparison







# Recommendations

(given Lupa's requirements, preferences, budget)

- Go for performance – Choose Salesforce
  - This is the Sports Car / Mercedes AMG
- Go for economy/value – Choose SugarCRM
  - Toyota or Honda
- Go something in-between – Choose Oracle



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**CRM ON DEMAND**

