FROST & SULLIVAN

Market Insight

Enhancing Customer Relationship Management (CRM) for Small Midsized Businesses (SMB)

Smart CRM Strategies, Tactics, and Solutions for SMB Growth

9857-76

August 2015

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Introduction

Small to midsized businesses (SMBs) become successful by truly understanding their customers and being responsive to customer needs. They deliver a superior Customer Experience from initial contact, to sale, delivery, and post-sale service. It is their prime marketplace differentiator.

And customer relationship management (CRM) software has become critical to SMBs by automating their ability to identify profitable sales opportunities and to develop customer loyalty and lifetime value, including social media referrals. CRM applications, combined with SMBs' business savvy, makes SMBs more competitive in an often challenging market.

Still, there are business, economic, and vendor technology challenges in turning realization into reality. How SMBs respond when implementing CRM and deciding on the right applications could well decide their future.

CRM Trends

The following are several trends that are shaping the use of CRM and the design of CRM applications today:

- **CRM focus shift.** Businesses are changing their CRM use priorities from sales, then support, and then marketing, to marketing and sales in tandem, followed by support. As a result, SMBs achieve higher profits by targeting customers whose requirements and budgets fit best with their products and services. Abetting this strategy are the customers themselves targeting specific companies to engage. There are more productive sales lead qualifications, faster closings, greater customer satisfaction, loyalty, and referrals. There also is reduced customer service and support costs. Customers are experiencing fewer issues with their products and services now that they're getting more aligned with their needs.
- **Strategic social media use.** SMBs are now turning to CRM tools to "social prospect" – surfacing prospects' career, demographics, interests, location, and purchase information from their social content. They are enhancing customer lifetime value (CLV) by uncovering, assessing, and tracking customers' social influence and referral values. SMBs target the top social influencers with specific content or offers, and measure product use across demographics. They quickly spot their strongest brand advocates and ensure they stay loyal and engaged.
- **Stronger solutions.** CRM applications aimed at SMBs are becoming easier to use, more functional, with added integrations and workflows. They supply deeper insights into customers and sales staff performance. They now permit any mobile device access and data inputs from multiple sources. CRM for SMB applications often now feature marketing automation, sales acceleration, and integration with enterprise resource planning (ERP) software. Hosted CRM applications have given SMBs more affordable and flexible access to features once only available with expensive and enterprise-targeted on-premise delivered solutions.
- **Demand for point analytics solutions.** SMBs have eschewed expensive, "boil the ocean" business intelligence solutions. Instead they are turning to point analytics solutions to measure one or two metrics that are critical to their businesses. These typically include customer satisfaction and opportunity management (i.e. having sales people focused on the core customer). Many of these point solutions are being acquired by CRM vendors and incorporated into CRM offerings, which avoids purchasing and integrating separate software.
- **Expanding non-traditional-voice channel support.** CRM strategies depend on companies' accessibility to customers on the channels of their choice. But these channels are changing as Millennials and GenYers who use web, mobile, chat, SMS/text, social media, video, and virtual agents are now the consumer and business decision maker in the mainstream. Increased customer use of these channels is a boon to SMBs as they reduce the demand for expensive live agents.

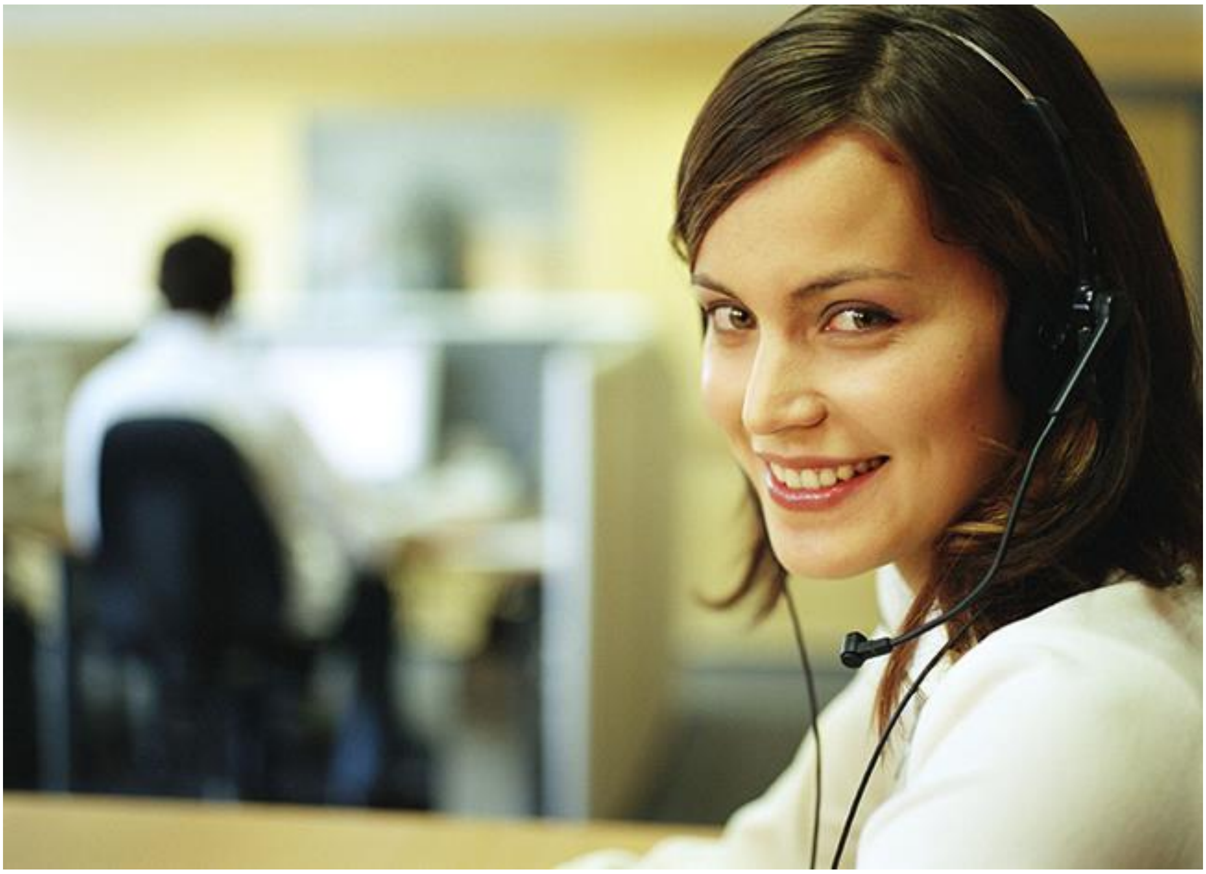
- **Omni-channel integration.** Customers are insisting on a consistent and high quality omni-channel Customer Experience at all channel and department touchpoints. As a result, companies are equipping their teams with single-platform CRM and sales applications. B2B sales reps also are now providing more information and insights to Marketing in order to help them target and tailor their campaigns.
- **Expanded mobile reliance.** Mobile CRM applications have become indispensable for B2B SMBs. Sales reps are now taking orders and closing sales on their devices instead of on paper. Tools like auto-tracking, call logging, and electronic catalogs have become more important in managing customer relationships. At the same time, B2B and B2C relationships increasingly depend on mobile-device-friendly web sites. Customers expect sites that they can readily see and drill through and be provided with immediate responses to inquiries.
- **Growing enterprise use of SMB solutions.** More enterprises are using CRM solutions written and targeted to SMBs. They are willing to forgo custom features found in enterprise solutions, like reporting, advanced functionality, and greater capacity, in exchange for lowered IT expenses and higher and a faster return on investment (ROI). Enterprises seem to have determined that high-end CRM applications are not necessary for specific groups of users, such as telesales, inside sales, and procurement. Moreover, many business units and even users (shadow IT) now source and deploy software without involving IT departments.

CRM Challenges

There are several key challenges facing SMB adoption and use of CRM solutions. Frost & Sullivan notes the following:

- **Economic and social pressures.** The slowly growing economy is generating more customers, but also more competitors. This, combined with the issue of inequality in today's economy, means that SMBs must accurately determine which income segmen customers fall within so as to maximize profitability and customer loyalty and referral value. Customers will grudgingly tolerate "IVR purgatories" and "eternity waits" from enterprises. But they expect personalized, understanding, and less bureaucratic "segment of one" service from SMBs.
- **Being IoT ready.** The Internet of Things (IoT) is opening up new opportunities for SMBs. Connected devices are being installed and used in a wide range of products. The real-time data they provide contain insights on product usage that companies can use to cross-sell, upsell, and affiliate market to customers that in turn builds customer relationships. IoT systems also reduce support costs through their ability to detect, and in some cases resolve issues, before they become serious problems. But companies need to filter and analyze huge volumes of information in order to determine relevant content in support of CRM strategies.
- **Omni-channel issues.** For many companies omni-channel remains more of a buzzword than a reality. There often is a lack of connection between online, the contact center, and retail. Companies are still figuring out how to solve issues that are cropping up with omni-channel integration. For instance – how to compensate sales reps for their accounts' online purchases? Typically, direct sales reports to the sales department, while eCommerce belongs to the marketing department. Bu things are changing rapidly at so many organizations. Companies also are looking at how to turn mobile customer engagement through the wireless device into revenue. A study by content management platform vendor Skimlinks reports that only 26% of purchases driven by commerce-related online content are made on wireless devices.
- **CRM fading as a forefront B2B sales tool.** Sales reps are spending more time in productivity applications and less time in CRM systems (often, they are only logging the bare minimum of time CRM systems so they get paid). CRM software is then becoming a background database that connects marketing, sales, service, and support.
- **Demand for complete and adaptable solutions.** SMBs are demanding CRM applications that allow them to manage the entire customer journey. They also want scalable, easy-to-use and feature-rich solutions to allow their "brand voices" to be heard. They also expect CRM solutions that integrate with business tools, such as Evernote, Google Docs, Office 365, and QuickBooks Online.

- **Social solutions mergers.** SMBs may be inhibited in their social strategies by the acquisition of social application vendors by larger companies. These moves often sharpen the acquirers' focus on enterprise customers. But these deals may lead third parties to buy, host, and resell them, integrated with CRM applications. These moves would then make them affordable and permit sharing of social insights and data with CRM solutions.
- **Fragmented CRM add-on point solutions markets.** There are too many separate and disconnected apps, such as those for calendar management and those for prospecting, resulting in limited or no data sharing. Instead, sales reps should be able to view all of them in a single connected portal.
- **Resisting the switch from legacy on-premise to cloud-based CRM solutions.** Some SMBs that have legacy CRM applications may want to keep with inefficient systems they are familiar with to avoid any crippling hitches associated changing solutions. SMBs also may experience resistance from IT departments. Finally, SMBs often have other more pressing priorities that force them to place technology changes on the back burner.



Summary and Recommendations

CRM applications have never been more essential, practical, and yet too often challenging for SMBs. Economic conditions and stiffening competition are making business wins a “game of inches”, measured by per customer or sale. Maximizing profitability is easier said than done. What follows are several suggestions from Frost & Sullivan on how best SMBs can reach their goals with CRM:

- **Have the right business processes.** CRM will only deliver results if SMBs are ready to take advantage of it. SMBs must establish, maintain, and develop business processes that enable them to rapidly anticipate and respond to market changes. Their processes and workflows must provide sufficient flexibility to retain and track lower-valued customers as they may become higher-valued ones. They need to feed rich, accurate, and timely customer data from which they can derive insights to identify and segment customers and determine what customer decisions are driving their business success. Finally, but most critically, SMBs must have products and services customers want, priced appropriately to their value and market demand. CRM methods and solutions can only benefit companies if these conditions are met.
- **More strategic and realistic solution acquisitions.** SMBs should determine why their businesses need CRM applications, and if so set out the goals the solutions will meet. Their CRM budgets have to be aligned with the expected value from those investments. When setting out solution criteria SMBs must set out scalability with functionality at the top of the list in order for them to obtain long term value from CRM applications. For example, a SMB may start with customer service contact management. But over time an SMB may need to incorporate marketing or sales force automation. Scalability also avoids changing solutions as companies grow, thus avoiding forklifting contacts, data, and files between them.
- **Ensure a personalized superior omni-channel Customer Experience.** SMBs have to provide an exceptional profitable level of customer service at all touchpoints in order to execute CRM strategies. They should have mobile-device responsive design for their web sites. They need applications that alert staff of customer issues and inquiries when companies contact or are contacted by customers. They should grant their contact center agents, sales reps, and retail staff authority in making deals and in solving customers’ problems and making sales.
- **Refine customer contact applications.** SMBs must either rely less on IVR or make it easier to use – as with speech applications, visual IVR, virtual agents – and equip it to provide more personalized experiences. SMBs should have near-instant availability of chat, SMS, and social media agents. The emerging best practice is for them to set up elite teams with superb comprehension, writing, and media and public relations skills to handle customer engagements on multiple channels.

- **Incorporate or specify sales productivity applications in CRM software.** These tools handle specific time-consuming tasks in the background, including notifying sales reps of opened and viewed emails and attachments, and click-to-dial. Sales reps can then focus on selling.
- **Investigate WebRTC.** SMBs should investigate Web Real-Time Communications (WebRTC) as it makes voice and video interactions more convenient by enabling them through browsers instead of through separate devices, and without plug-ins. WebRTC is presently available on Google, Mozilla, and Opera browsers, but not on Apple or Microsoft browsers. As a result WebRTC has a majority of desktop but only a minority of mobile usage. Even so, WebRTC has strong value as customers are more likely to make purchases over their desktops as indicated by the recent Skimlinks report. Microsoft also plans to incorporate a “next generation WebRTC Object Real-Time Communications” in its applications, including possibly in Microsoft Edge.
- **Consider having contact center tools in CRM suites.** Adjoining customer contact center solutions like chat and call routing should be easily linked into CRM applications. But some CRM applications have them built in, like chat. While such suites may save money, they risk saddling companies with less functional contact center applications. Best-of-breed contact center solution suppliers have responded with CRM solution integrations. But another option would be to source separate customer contact and CRM solutions from the same suppliers. If due diligence reveals that that both of them meet business needs, then companies may obtain suites-like benefits. Yet they will maintain the flexibility to change either solution if they no longer prove satisfactory.

Buyer’s Guide

Agile

Agile CRM’s contact management feature handles accounts, contacts, leads, and potential sales opportunities, appointment scheduling, calendars, notes, and tasks. Agile CRM covers a wide range of voice interactions: inbound and outbound calling, call logging, recording, and playback. It offers call automation with pre-set scripts and outbound voice messaging. It also provides a 360 degree view of customers and prospects, including their social media and web site activity. The Agile Social CRM suite enables companies to uncover leads and issues from conversations, monitor and interact with customers on their Twitter accounts, and post updates to social sites.

The Agile CRM solution also has marketing automation. And it has drag and drop workflows that can be integrated into companies’ web infrastructure. Companies can define triggers – customers’ lead scoring reaching certain values, or customers’ repeat online purchases of certain items, to start campaigns. The software also has behavior-based segmentation. Agile CRM has automated lead scoring, along with sales process automation. In addition, the marketing automation feature has a comprehensive email campaign suite with A/B testing, personalization, auto responding, tracking, and reporting.

Base

Base CRM provides a sales productivity tool with email templates and receiver activity alerts, task automation, real-time personalized notifications to clients and prospects, and smart lists. Smart lists are real-time, interactive tables that give sales reps and managers new insight into their sales pipelines. Base also has social media integration.

Base CRM analytics provides predictive forecasting as well, which uses sentiment analysis to determine lead satisfaction or dissatisfaction, and lead scoring. The solution also has sales forecasting, tracking, and reporting along with call logging, and recording. Base creates data-driven forecasts with intelligent forecasting that connects many of the often fragmented sales process data points. This feature removes subjectivity from the forecasting process.

Moreover, Base CRM is mobile-optimized. It includes lead geo-locations and mapping functionality and offers free native apps that provide call overlays. Those apps match incoming callers to Base contacts so that users know who is calling, what opportunity they are related to, and which stage the deal is in before they answer. Base also has offline data access for when there is no wireless connectivity. There also is step-saving one touch IP calling within its native apps and on the web application out of the box with WebRTC.

Finally, the Base contact card provides client and prospect call history, notes, and contact details. It also covers customer billing, service, support inquiries, and issues. And Base uses sentiment analysis to examine sales emails. It detects when negative messages come in and notifies reps or their managers if there is trouble with specific deals.

Batchbook

Batchbook offers a small business targeted, contact management-focused, and mobile-enabled cloud/hosted CRM solution. It provides tags to enable service or sales team members to quickly group together or search for related contacts. It has one-page summaries of contact events, interactions (like emails and Twitter messages), open to do lists, and colleague comments. Companies also can check customers' Twitter status.

In addition, Batchbook has intuitive contact setup and management. Companies can drag vCard or CSV files into it and it will quickly create detailed contact databases. Client companies can import contacts through its integration partners: Google (Gmail and Google Contacts), Eventbrite, MailChimp, Quickbooks, and Xero. Batchbook also will create searchable databases from other imported contact information. And client companies can have team members share contacts at no extra charge per user.

Batchbook also has in-depth sales pipeline management. Sales representatives can track new leads coming in from webforms, email marketing, and social posts. They can see any or all deals and those at specific sales process stages in their pipelines. And sales reps can drill down into data for more details, such as by amount and rep territory. Batchbook lets companies group deals together, view them side-by-side with related contact records, and update them in bulk or batch (hence the company name).

CapsuleCRM (Zestia)

Capsule CRM provides a solution which balances simplicity with functionality. Its contact management application enables contact imports from CSV files, Gmail, Outlook, vCard, and spreadsheets. Contacts can be categorized with customizable tags that can include additional information like lead sources. Notes from customer conversations and documents and files also can be added. Email communications are trackable. It also permits companies to group customers and prospects into lists and to have contacts shared between co-workers.

Capsule CRM pipeline management features sales dashboards and it tracks opportunities through using sales stage milestones that are linked to success factors which forecast potential sales revenues. And Capsule has configurable filters for data extracts and reporting.

Capsule CRM also has task management tools. They manage to-do lists and calendars. They create tasks for contacts and related matters, like appointments, calls, meetings, and submission deadlines. It can link tasks with contacts, opportunities, or cases for easy recall. Tasks also can be shared with co-workers.

Highrise

Highrise's CRM solution tracks customers, prospects, conversations, deals, and tasks, supplanting business address books. Companies can import contacts into the application, search, filter, and tag them, and send targeted right-timed emails. It has simplified data import and export and custom data fields for people and clients.

Companies can view tasks by clients, contacts, or projects, assign them to team members, and add email and SMS reminders. Highrise also lets companies share call and meeting notes, address books, documents, and files amongst their teams.

Insightly

Insightly is a hosted CRM solution with intuitive interfaces that result in short ramp-up times and ease-of-use, ideal for designed for SMBs. It offers instructor-led training to its customers in a partnership with Logical Operations and through self-service training FAQs and tutorial videos on the company website.

Insightly has integrated calendar, contact, project, and task management. The software helps companies create pipelines with stages on linear timeframes and it detects and tracks relationships between clients, prospects, and users. There is integration with many business applications, among them: Evernote, Google Apps, Gmail, and Google Drive, MailChimp, Microsoft Outlook and Office 365, and Quickbooks Online. There also is file-sharing through integrations with Box, Dropbox, and Microsoft OneDrive.

Insightly incorporates social media into the CRM tool. It detects social media profiles related to email addresses and displays Twitter content and public LinkedIn profiles inside the application. Users can explore contacts' public profiles on social sites such as Facebook, FourSquare, Google+, Klout, and Picasa.

Importantly, the Insightly application has multiple security layers. Client companies can specify restrictive permissions on just about any item. There is 128 bit SSL encryption on each page. Its databases are backed up daily and are securely transferred and stored with AES-256 encryption. Insightly's primary data center has been audited to SSAE 16 SOC Type II with redundant power and cooling, active fire detection and suppression, and staffed 24/7. And applications and data can be stored and run from backup data centers.

Maximizer

Maximizer CRM solutions come complete with core sales, marketing, and service functionality. They have customized flexible on-premise, hosted, and private cloud deployment options, vertical-specific editions, support global programs, and are mobile accessible.

The Maximizer Sales Force Automation tool centralizes all client information within a single action-oriented workspace. With it companies can easily identify and collaborate on opportunities, manage accounts, and accurately forecast sales pipeline and revenue.

The Maximizer Marketing Automation tool offers automated multi-phase marketing campaign scheduling, list management, web forms, an ROI calculator and more to easily deliver the content customer and prospects are most interested in. Companies can set events like content downloads, purchases, and support incidents to trigger campaigns, or auto responses that drive customer satisfaction and revenue.

The Maximizer Customer Service tool equips service team with background information to resolve customers' issues. They can capture data points from every channel to provide a complete case history, including origin, severity, priority, status and all previous communications, along with related documents, within a single, central location.

For analytics and insight, team members and senior managers can draw on pre-built sales, marketing, service and management-focused dashboards and more than 175 pre-designed Excel reports. They quickly and easily deliver actionable information that helps solve problems, seize opportunities, and refine everyday processes.

Microsoft Dynamics

Microsoft Dynamics CRM supports SMB customer service and support with a unified multichannel interface for voice, email, chat, mobile, social, and self-service. It provides visibility into previous and planned marketing activity, including on social media, and into customer sales and service interactions.

Microsoft Dynamics CRM also has text analytics to uncover sales opportunities and service issues. It has a knowledge base that taps multiple data and Internet sources. There also is “contextual guidance”, which are a set of customizable scripted steps that align sales team members with best practices.

The Microsoft solution also enables collaboration across teams through integration with Skype and Yammer. It automatically creates shared workspaces for leads and allows real-time proposal co-editing. To ensure performance it has dashboards, including data visualization, interactive charts, and sales and service reports.

NetSuite

NetSuite CRM+ is a cloud-based mobile-enabled solution aimed at midsized businesses. The NetSuite sales force automation provides a complete view of all pipelined leads and opportunities. Its contact and activity management feature captures detailed interaction records. It offers single-click conversions of opportunities into quotes and sales orders. It also can be used to build and maintain sales portals through sophisticated document management.

NetSuite CRM+ also has advanced probability-based forecasting, which offers weighted and adjustable measurement of pending opportunities, quotes and orders. Its order management provides actual sales and projections of recurring revenue in forecasts and variances. NetSuite has intelligent upsell management that suggests recommendations based on previous buying patterns. It also supplies automated tax and shipping-rate calculations, pricing and discounting rules. And NetSuite CRM+ offers flexible sales compensation management, with configurable commission rules and schedules. It can be integrated with NetSuite’s own payroll solution or with companies’ existing payroll applications.

Moreover, NetSuite CRM+ offers out-of-the-box cross-channel marketing automation. It has email marketing, full reporting and drill-down. It can analyze campaign statistics, historical purchasing combinations, and ROI. NetSuite CRM+ also has several integrations for other features. Integration with Microsoft Outlook supports seamless synchronization of calendar, contacts, to-dos, and email messages. There is Yammer and Qontext integration to bolster collaboration and productivity. There also is Google Apps integration for calendar synchronization and contextual access of NetSuite information from within Gmail.

NetSuite also can help companies resolve outstanding customer issues. Its case management and knowledge base enables trouble ticket creation, routing, tracking, and resolution by self-service and live agents. Dashboards and reporting monitor results, including customer satisfaction. NetSuite CRM+ also enables an omni-channel CRM programs through native integration with its eCommerce platform. There is a single system of record for customer information, interactions, and transactions. And it captures micro-interactions like quick visits to web sites. It also eliminates data reconciliation across CRM and eCommerce applications.

Finally, NetSuite CRM+ has "partner relationship management". This includes joint marketing campaigns, lead management, pipeline management, order processing, commissions, and royalties. It has full visibility into partners' leads, orders, and sales activities. And it enables partners to register and track their leads and supplies visibility into them, as well as into orders and sales.

Nimble

Nimble offers a hosted CRM solution that unifies email, phone, and social contacts, calendar, communications, and collaborations into a single and intuitive platform. It provides "contact insights" through its social-focused multichannel contact management solution. The Nimble Contact Record automatically fills out the contact record from names and emails and appends customer files with information about them that have been harvested across social media. It also analyzes shared interests and states which contacts are of interest and relevance and why.

The Nimble solution has "Stay in Touch" reminders and "Mark as Important" star markets. Customers and prospects can be filtered and segmented by "Last Contacted" or "Recently Contacted" from the sidebar. And it tracks the complete contact history on every channel.

The heart of Nimble's contact insights is its Rules Engine. Its algorithm learns from companies' users' behavior. These insights, along with information inputs, guide it to surface recommendations – to which customers to engage with, why, and how to connect. And Nimble offers a "Today Page" that presents staff with three contacts who've been "told" the Rules Engine is important each time they sign in for further action. The Today Page also presents to-do lists, personalized engagement opportunities, pipeline information, and customer milestones. A "Last Contacted" feature enables finding exact relevant matches on any group or tag.

Nimble offers a "truly unified inbox" for emails and for Facebook, Twitter, and LinkedIn messages. It automatically picks up emails and places them in the right contact records. Social comments also can be replied to within the solution. The Nimble Signals Tab presents social network notifications and it automates contact reminders. It also supplies shared commonalities including connections and histories with which to initiate or respond within productive conversations.

Pepperi

Pepperi makes a set of hosted multilingual and integrated mobile-app based CRM and CRM-supporting solutions aimed at small to midsized and growing B2B companies. The company targets brands and wholesalers that have field sales teams.

Pepperi Mobile CRM manages activities and tasks with call, correspondence, email, meeting, and reminder scheduling. It assigns and manages action items and tracks and reports sales visits. The application also captures, enables, and tracks sales orders and in-store activities. Sales reps use Pepperi to check and enter service requests, fill in smart forms, like contracts, perform stock-checking in the store, and take surveys on site. All activities are integrated with and synced back to the ERP systems.

Pepperi also enables B2B omni-channel eCommerce through customizable online catalogs. Those catalogs present a wide range of information – below-minimum stock and out of stock order indicators, discount policies, future order dates, measurement units, mix-and-match options, multiple price lists, prepacks, quantities, and variants. The catalogs can be localized by country, region, and customer segment, include pdfs and videos, and be linked into ERP systems for item information, pricing, and inventory levels.

The Pepperi Mobile Order Taking app backs the Mobile CRM solution with intuitive, smart, and complete catalog order taking and sales tracking. It helps manage sales rep performance and costs with dashboards, automated emails with performance charts to reps and managers, and route map and activities tracking.

At the same time, the Pepperi for Buyers solution enables customers to order from self-service brandable B2C-like catalog-based storefronts with shopping carts. Manufacturers and distributors can publish their catalogs online, assign them to customers, manage pricing, and track and fulfill sales orders. Pepperi for Buyers also has B2C-like automated email customer notifications based on eCommerce workflows.

Finally, Pepperi Order Management links Pepperi for Sales and Pepperi for Buyers. It provides a single point of management through centralized control of, and a consolidated view into, all sales orders captured by rep-assisted and online channels. It manages and connects into ERP systems for fulfillment and returns. Pepper Order Management also has dashboards and reports to provide insights into top performing products, customer buying trends, sales rep performance, and order fulfillment. There is a separate merchandising app that enables B2B companies to arrange products and displays and ensure contract terms compliance. All Pepperi mobile solutions have automatic resyncing for reconnections when signals are lost or degraded.

Pipeliner

Pipeliner CRM creates a visual roadmap of sales stages, reporting, and forecasting, and visual contact management. It informs users where customers and prospects are in the sales process. Users also can share their sales pipelines. Pipeliner CRM allows creation of an almost unlimited number of pipelines.

Pipeliner Lead Management also permits companies to assign or allows takeover of lead ownership, and to qualify, score, track, develop, move, and archives leads. Users also have "Smart Fields" (auto-calculated fields) to automatically turn leads into opportunities. The Pipeliner Opportunity Tracking feature has customized sales pipeline views and **"**Dynamic Playbooks" to coordinate documents, files, proposals and marketing assets at each sales stage. Maps, research, and parcel and delivery tracking web sites also can be brought into Pipeliner. Pipeliner CRM automatically tracks how long it takes a deal to progress from lead to close and how long each step takes.

In addition, with Pipeliner CRM, companies can map off-the-shelf or custom sales methodologies. It also provides reports, performance dashboards, and dynamic sales targets (e.g., how close staffs are to hitting targets).

Pipeliner CRM has several guides and sales enablement and planning tools**.** Companies can create visual org. charts by dragging and dropping "business card" views. The Smart Org Chart lets users decide who and what to pin from the org. chart to the Pipeliner Buying Center, which provides a view of customers' buying hierarchies. And users can segment networks with the Profile Manager tool, write sales process best practices guides with customized templates, and monitor pipelines with "velocity alerts".

Sage

Sage CRM is an adaptable and easy to use CRM solution. Sales forecasting, reporting, opportunity management, marketing campaign management and an email marketing integration with MailChimp ensure companies stay on top of leads and opportunities effectively from lead to close. Sage CRM offers management dedicated sales team performance tools including visual reports, charts and dashboards that enable at-a-glance assessments and informed decision-making.

Sage CRM is available in cloud and on-premise. Both Sage CRM Cloud and Sage CRM On-Premise offer a wide range of sales, marketing, and customer service functionality to support the needs of growing businesses. The cloud-based Sage CRM Professional is an ideal solution for SMBs as it avoids in-house setup, maintenance, and upgrades. Sage CRM On-Premise also offers advanced customization capabilities and a wide choice of Sage ERP integrations.

Salesforce

Salesforce offers highly scalable and versatile hosted CRM solutions that can grow with businesses. The base or Group Salesforce Small Business Solution edition has account, case, and contact management, opportunity, task, and event tracking, and lead scoring, routing, and assignment. It also has customizable reports and standard dashboards, Salesforce Chatter enterprise social networking. It is mobile-optimized with access, customization, and administration.

The Professional edition builds on the Group solution with campaign execution and management, sales forecasts, handles product orders and quotes, allows companies to launch email blasts, and its dashboards are customizable. The Enterprise Edition adds customer profiling, workflow and approval automation, custom app development, integration with other systems and apps using the web services API, and report history tracking. It also has the Salesforce Identity login and registration application, and access to the Salesforce Private AppExchange.

Salesforce’s Desk.com product line enables SMB companies to provide customer service and support with an out-of-the-box, scalable solution that is connected to the Salesforce Small Business Solution and Sales Cloud. The base or Pro edition provides case management for multiple channels, agent productivity tools, mobile capabilities, reporting, and knowledge base applications accessible by agents for internal use as well as by customers through a mobile-optimized self-service portal. There are over 40 partner apps including some of the most popular SMB applications on the market as well as Open CTI applications. The Desk.com Business Edition adds dashboards, extra API calls, unlimited self-service portals, unlimited page layouts for increased customization, and permits high volumes of case exports to other applications.

SMB companies can grow into the Service Cloud as their customer service needs become more sophisticated. Built on the Salesforce Platform, Service Cloud has customizable case management workflow and analytics for use across the business, advanced service contract and entitlements, as well as the ability to integrate both legacy and third-party apps. And Service Cloud offers customer interaction tools including call scripting, customer and team collaboration, customizable agent console, social customer care, mobile-optimized social communities hosting and management, and a cutting-edge mobile SDK. Companies also can upgrade to the Unlimited Edition and bundle Service Cloud with Sales Cloud.

SugarCRM

The SugarCRM offering includes sales, marketing, and support features that SMBs' customer facing operations. The Sugar solution has been written to minimize companies' total cost of ownership so that they can ensure that the users who need the applications have them.

Sugar differs from other offerings in the SMB space by incorporating the Sugar UX user interface in its applications. Sugar UX provides a fluid, user-friendly experience across any device and screen. It has embedded collaboration tools through the Collaboration Panel. It also has customer data intelligence through the Intelligence Panel. It offers micro dashboards with which companies can see customer status, buying frequency and value, billing and service histories, brand advocacy (e.g. how often they comment on social media), and total lifetime value.

The Sugar Professional Edition, which is aimed at SMBs and smaller departments, provides contact center and support automation, marketing lead management, and sales automation and forecasting. It also has Sugar Mobile app, with features that include click-to-call and text, GPS, and off-line synchronization. It sizes the screens to the users' devices.

The Sugar Enterprise Edition adds custom activity streams, customer-facing self-service, enterprise forecasting, opportunity management, enterprise forecasting, and native SQL reporting. Companies can easily migrate to Sugar Enterprise.

Sugar applications are open source, customizable, and they require minimal integration with other applications. They are available hosted, in private clouds, or on-premise, and they are "migrateable" between these environments.

Zoho

Zoho CRM offers activity and customer and prospect prioritization through three features. The Zoho CRM for Google AdWords allows sales staff to interact with leads drawn from searched ad groups and keywords through Zoho's "click-to-deal" application. The CRM View intelligently scans customers according to their stages in the sales cycle. It categorizes them by leads, customers, and potential customers. The web site visitor tracking feature captures information about visitors and it alerts sales teams each time customers or prospects visit the sites.

Zoho CRM offers a sales force automation solution that performs account management as deep as "parent-child" between accounts and their subsidiaries, or other divisions. It handles lead generation and qualification, competitive, pipeline, and probability analysis, quota management, and sales forecasting. It has calendar, event, meeting, and task management to manage customer and prospect follow-ups. Zoho also supports sales programs with its sales opportunity tracking module. It provides an exclusive interface to store and manage information details relative to opportunities, like stage, probability, and expected revenue. It can issue "Big Deal" alerts of completed or pending major sales.

Zoho CRM has in-depth customer contact and engagement. The Zoho PhoneBridge integrates voice calling applications with Zoho CRM for caller information, including context, and reminders of upcoming calls. The MailMagnet for Zoho CRM captures, collates, and distributes customer emails, notifies recipients, and enables replies to emails within the CRM application. MailMagnet intelligently scans mailboxes and displays only relevant emails from customer and prospects. The Zoho Social CRM application brings Facebook and Twitter profiles inside the CRM and enriches customer profiles with socially-gathered information. It monitors comments and social activities and permits responses to direct messages, likes and mentions. It also can be set up to trigger alerts of mentions of companies, issues, and opportunities to sales teams.

CRM for SMBs Use Case

Expensify

Expensify is a San Francisco, California-headquartered financial services company that specializes in automating and managing online expense reports. Founded in 2008, it has a sales team of 19 members across its location and remotely.

The Situation

To manage sales leads and productivity Expensify started with Excel. The company then migrated to a CRM application that was built within Google Apps in 2010.

However, the company soon found that their customer data flow caused congestion in the sales team members' inboxes. This issue prompted it to acquire a CRM application that was infinitely configurable in 2014. While this aspect enabled Expensify to adapt the software to avoid issues like data flow congestion, it also proved to be unwieldy and difficult to manage.

"We were faced with the dilemma of selecting usability or customization," said Jason Mills, head of sales at Expensify. "But getting a CRM selected and implemented was just half the battle. With our sales team growing, we needed to track the multiplying customer base, and more pipeline visibility."

The Response

In August, 2014, Expensify turned to Base for assistance, after evaluating other CRM solutions. Expensify liked the software's lead prioritization and in-depth reporting. Expensify also appreciated the user-friendly design, automatic email tracking, in-product calling, and top mobile apps.

"Base adds great new features all the time," said Mills. "I can't understate how impressed I am at the break-neck speed with which Base adds this new functionality. It seems close to a new feature every couple of weeks."

The Expensify team now tracks all of their sales communication with Base. They use lead prioritization to sort through all the leads in their pipeline and focus on the opportunities that are most likely to close. Mills used the data to build an algorithm that points his team to the best leads in the Expensify sales pipeline.

"Base gives our team one central place to connect with prospects and customers, whether it's a call or an email," said Mills. "Base also gives us a highly automated way to score and prioritize incoming prospects."

The Results

The Base solution went live in September, 2014. Expensify staff found it extremely easy to use.

“In fact, while in many cases the process should come before the tool, we found that Base enabled us to quickly augment our core sales processes and make them best-in-class,” said Mills.

Base’s reporting tools enabled Expensify to increase its close rates by 24%. Meanwhile, its lead prioritization application helped the company boost its response rate to its highest quartile of leads (top 25%) within less than one hour.

“That's a 65% decrease from our response times before we used lead prioritization,” said Mills. “The reporting in Base gives us immense insights into how our geographically-dispersed team operates, especially in terms of the areas for improvement.”

In essence, Base has helped improve Expensify’s daily business. And as a result it has now become an integral component in its toolkit.

“We chose Base exactly because our team can live in it entirely, without the need to manage workflows in disparate systems,” noted Mills.

The Final Word: Buyer’s Guide Top Picks

Base. Base CRM has three strong suits: sales force automation, Big Data, and ease-of-use. By making these areas its focus it is directly addressing the core needs of B2B sales teams.

Pepperi. Pepperi has excellent and innovative mobile sales force automation. What makes Pepperi unique as a CRM solution is that it enables B2B omni-channel eCommerce. At its core are customizable online catalogs that field sales reps can show to and enter for clients.

Zoho. The Zoho CRM solution has all around functionality. It covers contact center and social media and it enables application from mobile devices. Zoho CRM provides a 360-degree view of the sales pipeline and sales cycle.

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