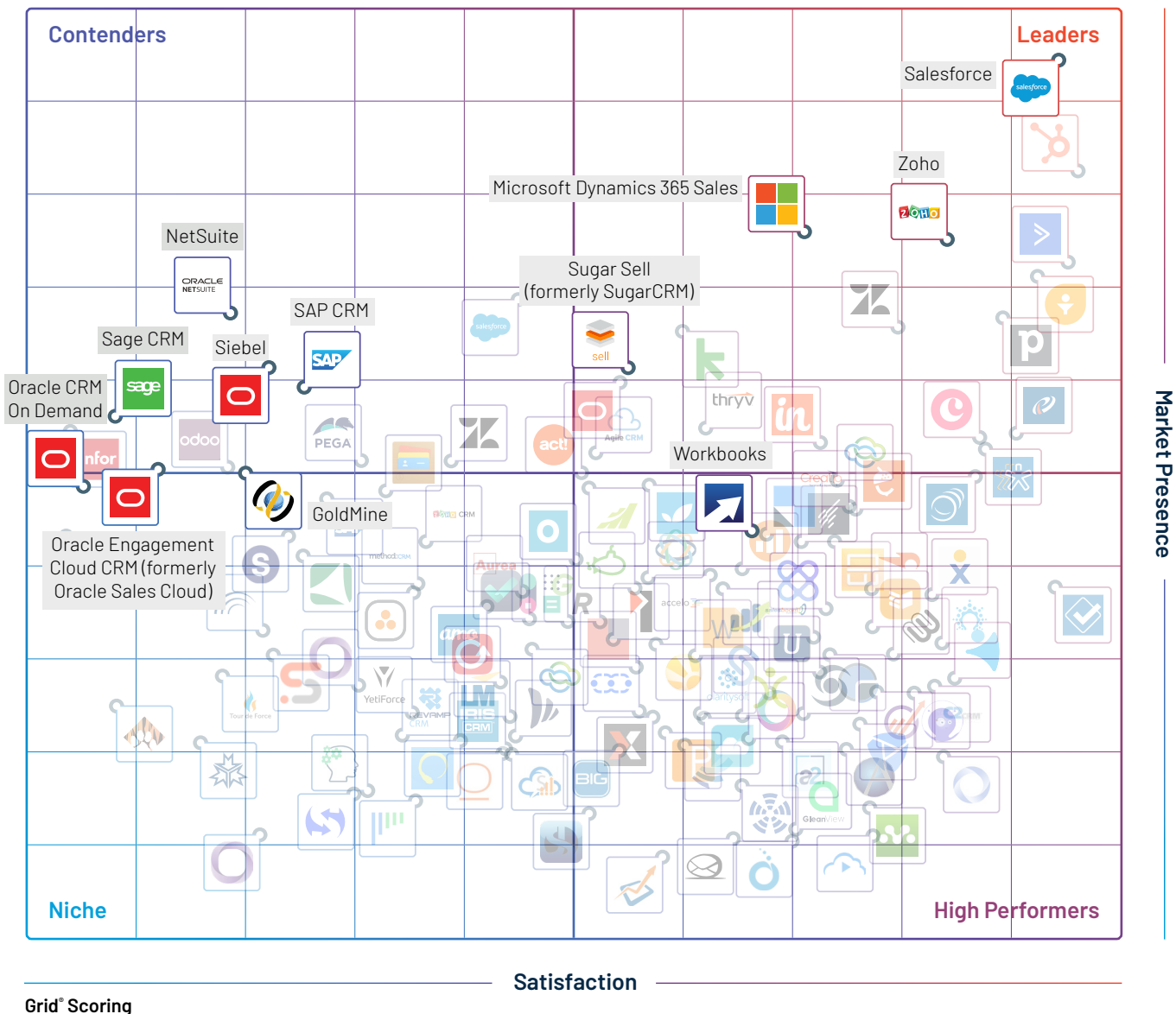


Grid[®] Report for CRM

Summer 2020



Workbooks vs. Competitors



Workbooks vs. Competitors

Description

This document compares Workbooks with its main competitors highlighted on the CRM Grid®. Satisfaction and feature ratings for products are shown below. The highest score for each metric is in green. Pricing editions for products are included following the satisfaction and feature ratings.

Data in this document was pulled from reviews submitted up until June 02, 2020.

Satisfaction Ratings

	Satisfaction		Satisfaction by Category						Net Promoter Score (NPS)
	Likely to Recommend	Product Going in Right Direction?	Meets Requirements	Ease of Admin	Ease of Doing Business	Quality of Support	Ease of Setup	Ease of Use	Net Promoter Score (NPS) (Range from -100 to +100)
Workbooks	85%	87%	86%	84%	88%	87%	81%	86%	43
Salesforce	84%	82%	89%	80%	83%	81%	75%	81%	43
Microsoft Dynamics 365 Sales	75%	67%	83%	79%	81%	78%	75%	78%	8
Zoho	79%	78%	85%	81%	81%	77%	80%	83%	24
Sugar Sell (formerly SugarCRM)	74%	72%	81%	79%	80%	78%	76%	78%	10
NetSuite	68%	63%	77%	70%	68%	70%	63%	68%	-6
SAP CRM	71%	67%	81%	75%	82%	76%	69%	67%	-3
Siebel	68%	57%	79%	68%	72%	75%	64%	70%	-8
Sage CRM	69%	53%	75%	71%	67%	68%	67%	71%	-13
GoldMine	73%	50%	81%	76%	78%	77%	70%	78%	7
Oracle Engagement Cloud	72%	81%	78%	69%	69%	71%	66%	77%	-4
Oracle CRM On Demand	69%	46%	76%	70%	70%	69%	67%	71%	-18
Average	74%	67%	81%	75%	77%	76%	71%	76%	7

Workbooks vs. Competitors

Feature Comparison / Sales Force Automation

	Contact & Account Mgmt.	Partner Relationship Mgmt. (PRM)	Opportunity & Pipeline Mgmt.	Task / Activity Mgmt.	Territory & Quota Mgmt.	Desktop Integration	Product & Price List Mgmt.	Quote & Order Mgmt.	Customer Contract Mgmt.
Workbooks	87%	N/A	84%	85%	81%	83%	82%	83%	84%
Salesforce	89%	85%	88%	85%	82%	84%	82%	83%	85%
Microsoft Dynamics 365 Sales	84%	81%	82%	81%	79%	82%	79%	80%	83%
Zoho	86%	85%	83%	83%	79%	83%	81%	81%	84%
Sugar Sell (formerly SugarCRM)	83%	79%	81%	79%	74%	76%	75%	77%	81%
NetSuite	77%	72%	73%	73%	67%	72%	76%	77%	75%
SAP CRM	80%	N/A	78%	79%	81%	78%	79%	81%	81%
Siebel	78%	76%	76%	77%	76%	76%	75%	77%	78%
Sage CRM	75%	N/A	75%	76%	69%	69%	73%	73%	75%
GoldMine	84%	N/A	73%	81%	69%	73%	70%	70%	80%
Oracle Engagement Cloud	78%	76%	77%	77%	73%	76%	75%	75%	78%
Oracle CRM On Demand	78%	74%	79%	74%	70%	67%	69%	69%	78%
Average	82%	79%	79%	79%	75%	77%	76%	77%	80%

* N/A is displayed when fewer than five responses were received for the question.

Workbooks vs. Competitors

Feature Comparison / Marketing Automation

	Email Marketing	Campaign Management	Lead Management	Marketing ROI Analytics
Workbooks	82%	81%	83%	83%
Salesforce	81%	83%	86%	N/A
Microsoft Dynamics 365 Sales	79%	78%	81%	79%
Zoho	81%	80%	85%	81%
Sugar Sell (formerly SugarCRM)	74%	75%	81%	74%
NetSuite	67%	66%	73%	71%
SAP CRM	74%	N/A	80%	80%
Siebel	75%	77%	76%	79%
Sage CRM	69%	75%	73%	70%
GoldMine	72%	N/A	75%	N/A
Oracle Engagement Cloud	81%		79%	N/A
Oracle CRM On Demand	73%	70%	72%	73%
Average	76%	76%	79%	77%

*N/A is displayed when fewer than five responses were received for the question.

**A blank box indicates that a vendor has selected that they do not offer that feature.

Workbooks vs. Competitors

Feature Comparison / Customer Support

	Case Management	Customer Support Portal	Knowledge Base	Call Centre Features	Support Analytics
Workbooks	86%	83%	84%	84%	85%
Salesforce	85%	83%	84%	82%	83%
Microsoft Dynamics 365 Sales	82%	81%	81%	80%	82%
Zoho	81%	80%	81%	79%	81%
Sugar Sell (formerly SugarCRM)	81%	80%	80%	78%	80%
NetSuite	76%	73%	70%	70%	74%
SAP CRM	83%	81%	82%	79%	80%
Siebel	81%	78%	80%	81%	80%
Sage CRM	75%	71%	73%	71%	67%
GoldMine	73%	74%	74%	63%	68%
Oracle Engagement Cloud	74%	73%	74%	74%	73%
Oracle CRM On Demand	76%	78%	77%	72%	76%
Average	79%	78%	78%	76%	77%

Workbooks vs. Competitors

Feature Comparison / Reporting & Analytics

	Reporting	Dashboards	Forecasting
Workbooks	84%	83%	83%
Salesforce	86%	86%	84%
Microsoft Dynamics 365 Sales	82%	82%	80%
Zoho	83%	83%	82%
Sugar Sell (formerly SugarCRM)	79%	82%	77%
NetSuite	77%	76%	72%
SAP CRM	81%	80%	80%
Siebel	80%	78%	78%
Sage CRM	76%	78%	70%
GoldMine	73%	75%	70%
Oracle Engagement Cloud	78%	77%	79%
Oracle CRM On Demand	79%	81%	75%
Average	80%	80%	78%

Workbooks vs. Competitors

Feature Comparison / Mobile & Social

	Social Collaboration Features	Social Network Integration	Mobile User Support
Workbooks	81%	82%	79%
Salesforce	81%	80%	79%
Microsoft Dynamics 365 Sales	78%	79%	77%
Zoho	82%	82%	82%
Sugar Sell (formerly SugarCRM)	76%	76%	78%
NetSuite	60%	58%	64%
SAP CRM	N/A	N/A	73%
Siebel	76%	76%	77%
Sage CRM	N/A	N/A	62%
GoldMine	N/A	N/A	60%
Oracle Engagement Cloud	78%	N/A	78%
Oracle CRM On Demand	N/A	N/A	71%
Average	77%	76%	73%

* N/A is displayed when fewer than five responses were received for the question.

Workbooks vs. Competitors

Feature Comparison / Platform

	Customisation	Workflow Capability	User, Role, and Access Management	Document & Content Mgmt.	Performance and Reliability
Workbooks	87%	85%	87%	81%	87%
Salesforce	86%	85%	87%	82%	89%
Microsoft Dynamics 365 Sales	84%	83%	85%	81%	80%
Zoho	81%	81%	85%	81%	84%
Sugar Sell (formerly SugarCRM)	85%	80%	83%	78%	79%
NetSuite	81%	75%	76%	69%	77%
SAP CRM	79%	80%	82%	80%	80%
Siebel	73%	78%	78%	73%	72%
Sage CRM	72%	68%	74%	71%	71%
GoldMine	76%	74%	78%	72%	77%
Oracle Engagement Cloud	73%	73%	72%	75%	68%
Oracle CRM On Demand	78%	76%	88%	73%	84%
Average	80%	78%	81%	76%	79%

Workbooks vs. Competitors

Feature Comparison / Integration

	Data Import & Export Tools	Integration APIs	Breadth of Partner Applications
Workbooks	84%	84%	80%
Salesforce	86%	87%	89%
Microsoft Dynamics 365 Sales	82%	81%	80%
Zoho	85%	81%	79%
Sugar Sell (formerly SugarCRM)	79%	79%	77%
NetSuite	73%	69%	69%
SAP CRM	76%	79%	75%
Siebel	76%	78%	77%
Sage CRM	72%	75%	68%
GoldMine	73%	69%	66%
Oracle Engagement Cloud	67%	67%	67%
Oracle CRM On Demand	82%	78%	68%
Average	78%	77%	75%

Pricing

Below you can find pricing editions for Workbooks and its main competitors. Editions shown were pulled from vendors' websites or provided directly by the vendor.

* Not all product edition information is publicly available. Products with missing pricing information include NetSuite CRM, GoldMine, SAP CRM, Oracle Siebel, and Oracle CRM On Demand. For pricing of these products, please contact the vendors.

Workbooks

FREE Edition (2 users)	CRM Edition	Business Edition
Free	£21 / \$30 / €25 /user/month	£46 / \$65 / €54 /user/month

Pricing

Salesforce

Sales Essentials Edition	Professional Edition	Enterprise Edition	Unlimited Edition
\$25 /user/month	\$75 /user/month	\$150 /user/month	\$300 /user/month
Out-of-the-box CRM for up to 5 users	Complete CRM for any size team	Deeply customizable CRM for your business	Unlimited CRM power and support
Automatic data capture	Account and contact management	Get all Professional features PLUS:	Get all Enterprise features PLUS:
Lead Management	Opportunity tracking	Workflow automation	Unlimited customizations
Opportunity Management	Lead management	Enterprise territory management	Unlimited custom apps
Customizable Sales Process	Task and event tracking	Profiles and page layouts	Multiple sandboxes
Salesforce Mobile App	Customizable reports and dashboards	Custom app development	Additional data storage
Configurable Reports and Dashboards	Mobile access and administration	Integration via web service API	24/7 toll-free support
Seamless collaboration	Chatter — company social network	Salesforce Identity	Access to 100+ admin services
Smart mobile apps	Outlook Side Panel and sync	Salesforce Private AppExchange	Sales data
Case Management	Role permissions	Report history tracking	Sales Cloud Engage
Account and Contact Management	Case management	Approval automation	
Task Management, Activity Feed	Campaigns	Sales data	
Chatter	Quotes and orders	Sales Cloud Engage	
Lightning App Builder	Collaborative forecasts		
AppExchange	Mass email		
Unlimited Custom Applications	Sales Data		
	Sales Cloud Engage		

Pricing

Microsoft Dynamics 365 Sales

Customer Engagement Plan	Dynamics 365 Plan	Unified Operations Plan
\$115 /month per user	\$210 /month per user	\$190 /month per user
Get full use of applications that help build and support customer relationships.	Get full use of all applications in one comprehensive, cost-efficient option.	Get full use of applications that help connect and manage your business operations.

Zoho

Free Edition	Standard Edition	Professional Edition
\$0 Free for 3 users	\$12/month per user	\$20/month per user
https://www.zoho.com/crm/zohocrm-pricing.html		
Enterprise Edition	Ultimate	
\$35/month per user	\$45/month per user	

Pricing

Sugar Sell (formerly SugarCRM)

Sugar Professional	Sugar Professional	Sugar Enterprise
\$80 /user/month	\$52 /user/month	\$85 /user/month

Sage CRM

Sage CRM Cloud
\$39 per user per month

GoldMine

GoldMine Cloud	Goldmine Premium - OWN IT
\$55 per user per month	\$26 per month
Billed Monthly	*when amortized over 3 years
	Bundles include one year of technical support and software updates.

Pricing

Oracle Engagement Cloud

Professional Edition	Standard Edition	Enterprise Edition	Premium Edition
\$65 / month per user	\$100 / month per user	\$200 / month per user	\$300 / month per user
CX Core	Professional Edition+	Standard Edition+	Enterprise Edition+
Mobile App for Smartphones and Tablets	Oracle Sales Cloud for Outlook	Unit Forecasting	Whitespace Analysis
Sales Analytics	Territory Management	Oracle Mobilytics	Oracle Voice
Revenue Forecasting	Customer Data Management	Mobile App Designer	Enterprise Contracts
Sales Catalog		Incentive Compensation	
Campaigns		Quote Management	
Configuration and Customization Toolset		Oracle Sales Cloud for IBM Notes	
One Test Environment		Oracle Sales Cloud for Gmail	
		Sales Predictor	
		Content Sharing with Sales Lightbox	

Grid® Methodology

Grid® Rating Methodology

The Grid® represents the democratic voice of real software users, rather than the subjective opinion of one analyst. G2 rates products from the CRM category algorithmically based on data sourced from product reviews shared by G2 users and data aggregated from online sources and social networks.

Technology buyers can use the Grid® to help them quickly select the best products for their businesses and to find peers with similar experiences. For vendors, media, investors, and analysts, the Grid® provides benchmarks for product comparison and market trend analysis.

Grid® Scoring Methodology

G2 rates products and vendors based on reviews gathered from our user community, as well as data aggregated from online sources and social networks. We apply a unique algorithm (v3.0) to this data to calculate the Satisfaction and Market Presence scores in real time. The Grid® Report for CRM | Summer 2020 is based on scores calculated using the G2 algorithm v3.0 from reviews collected through June 02, 2020. To view the CRM Grid® with the most recent data, please visit the [CRM](#) page.

Satisfaction

The Satisfaction rating is affected by the following (in order of importance):

- ▶ Customer satisfaction with end user-focused product attributes based on user reviews
- ▶ Popularity and statistical significance based on the number of reviews received by G2
- ▶ Quality of reviews received (reviews that are more thoroughly completed will be weighted more heavily)
- ▶ Age of reviews (more-recent reviews provide relevant and up-to-date information that is reflective of the current state of a product)
- ▶ Customers' satisfaction with administration-specific product attributes based on user reviews
- ▶ Overall customer satisfaction and Net Promoter Score® (NPS) based on ratings by G2 users

Note: The customer satisfaction score is normalized for each Grid®, meaning the scores are relative.

Market Presence

The Market Presence score is affected by the following (in order of importance):

- ▶ Market presence is a combination of 15 metrics from G2's reviews, publicly available information, and third-party sources
- ▶ Both the software vendors and the individual products are measured on various criteria. The criteria are listed in order of importance. Products metric receive greater weight than vendor metrics

Criteria	Measured For		Metrics
	Product	Vendor	
Number of Employees	✓	✓	Employee Count (based on social networks and public sources)
Reviews	✓		Review Count (weighted by recency)
Web Presence	✓	✓	
Social Presence	✓	✓	
Growth	✓	✓	Employee Growth, Web Presence Growth
Vendor Age		✓	
Employee Satisfaction and Engagement		✓	

Grid® Methodology

- ▶ Each input is normalized by category and segment. This means that scores are relative to other products in the category/segment and may change from segment to segment
- ▶ The scores are then scaled from 0-100

Grid® Categorization Methodology

Making G2 research relevant and easy for people to use as they evaluate and select business software products is one of our most important goals. In support of that goal, organizing products and software companies in a well-defined structure that makes capturing, evaluating, and displaying reviews and other research in an orderly manner are a critical part of the research process.

To manage the process of categorizing the software products and the related reviews in the G2 community, G2 follows a publicly available [categorization methodology](#). All products appearing on the Grid® have passed through G2's categorization methodology and meet G2's category standards.

Many terms that appear regularly across G2 and are used to aid in product categorization warrant a definition to facilitate buyer understanding. These terms may be included within reviews from the G2 community or in executive summaries for products included on the Grid®. A [list of standard definitions](#) is available to G2 users to eliminate confusion and ease the buying process.

Rating Changes and Dynamics

The ratings in this report are based on a snapshot of the user reviews and social data collected by G2 up through June 02, 2020. The ratings may change as the products are further developed, the vendors grow, and as additional opinions are shared by users. G2 updates the ratings on its website in real time as additional data is received, and this report will be updated as significant data is received. By improving their products and support and/or by having more satisfied customer voices heard, Contenders may become Leaders and Niche vendors may become High Performers.

Trust

Keeping our ratings unbiased is our top priority. We require the use of a LinkedIn account or verified business email address to validate a G2 user's identity and employer. We also validate users by partnering with vendors and organizations to securely authenticate users through select platforms. We do not allow users to review their current or former employers' products, or those of their employers' competitors. Additionally, all reviews are manually checked by our team after our algorithm filters out reviews that don't meet our submission requirements. All reviews must pass our moderation process before they are published.

Our G2 staff do not add any subjective input to the ratings, which are determined algorithmically based on data aggregated from publicly available online sources and social networks. Vendors cannot influence their ratings by spending time or money with us. Only the opinion of real users and data from public sources factor into the ratings.

Grid® Inclusion Criteria

All products in a G2 category that have at least 10 reviews from real users of the product are included on the Grid®. Inviting other users, such as colleagues and peers, to join G2 and share authentic product reviews will accelerate this process.

If a product is not yet listed on G2 and it fits the market definition above, then users are encouraged to [suggest its addition](#) to our [CRM category](#).

Product Profiles

Product profiles and detailed charts are included for products with 10 or more reviews.