Grid® Report for CRM
Summer 2021

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. Satisfaction, feature and additional ratings are included.

Data in this document was pulled from reviews submitted up until June 01, 2021.

Satisfaction Ratings

	Satisfaction		Satisfaction by Category						Net Promoter Score (NPS)
	Likelihood to Recommend	Product Going in Right Direction?	Meets Requirements	Ease of Admin	Ease of Doing Business With	Quality of Support	Ease of Setup	Ease of Use	Net Promoter Score (NPS) (Range from −100 to +100)
Workbooks	85%	88%	86%	84%	88%	88%	82%	86%	45
Microsoft Dynamics 365	75%	68%	83%	79%	81%	78%	75%	78%	9
Oracle Fusion Cloud CX / CRM	71%	81%	78%	69%	69%	71%	66%	77%	−5
Oracle On Demand	70%	46%	76%	70%	70%	69%	67%	71%	−13
Salesforce CRM	84%	82%	89%	80%	83%	82%	75%	81%	44
Sugar Sell	75%	72%	81%	79%	80%	78%	75%	78%	12
Zoho CRM Plus	82%	91%	87%	82%	76%	87%	73%	84%	45
GoldMine	73%	50%	81%	76%	78%	77%	70%	78%	7
Sage CRM	69%	55%	76%	71%	68%	69%	67%	72%	−10
Netsuite	68%	64%	77%	71%	69%	71%	63%	69%	−4
Average	75%	70%	81%	76%	76%	77%	71%	77%	13

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%	83%	84%	84%	81%	83%	81%	**83%**	84%
Microsoft Dynamics 365	84%	82%	82%	81%	79%	82%	79%	81%	83%
Oracle Fusion Cloud CX / CRM	78%	76%	77%	77%	73%	76%	75%	75%	78%
Oracle On Demand	78%	74%	79%	74%	70%	67%	69%	69%	78%
Salesforce CRM	**89%**	**85%**	**88%**	**85%**	82%	**84%**	**82%**	**83%**	**85%**
Sugar Sell	83%	80%	81%	80%	75%	76%	76%	77%	81%
Zoho CRM Plus	86%	74%	N/A	80%	**89%**	N/A	N/A	69%	83%
GoldMine	84%		73%	81%	69%	73%	70%	70%	80%
Sage CRM	75%		76%	77%	69%	69%	73%	72%	74%
Netsuite	77%	72%	73%	73%	67%	72%	76%	77%	75%
Average	82%	78%	79%	79%	75%	76%	76%	76%	80%

*N/A is displayed when fewer than five responses were received for the question.
**A blank box indicates that a seller has selected that they do not offer that feature.

Workbooks vs. Competitors

Feature Comparison / **Marketing Automation**

	Email Marketing	Campaign Management	Lead Management	Marketing ROI Analytics
Workbooks	**82%**	81%	83%	**83%**
Microsoft Dynamics 365	79%	79%	81%	79%
Oracle Fusion Cloud CX / CRM	81%		79%	
Oracle On Demand	73%	70%	72%	73%
Salesforce CRM	81%	**83%**	**86%**	
Sugar Sell	75%	76%	81%	74%
Zoho CRM Plus	79%		83%	
GoldMine	72%		75%	
Sage CRM	69%	75%	75%	71%
Netsuite	68%	67%	73%	72%
Average	76%	76%	79%	75%

*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%
Microsoft Dynamics 365	82%	81%	82%	81%	82%
Oracle Fusion Cloud CX / CRM	74%	73%	74%	74%	73%
Oracle On Demand	76%	78%	77%	72%	76%
Salesforce CRM	85%	83%	84%	82%	84%
Sugar Sell	81%	80%	80%	79%	80%
Zoho CRM Plus	N/A	77%	86%	N/A	83%
GoldMine	73%	74%	74%	63%	68%
Sage CRM	74%	71%	73%	71%	67%
Netsuite	77%	74%	71%	71%	74%
Average	79%	77%	79%	75%	77%

Workbooks vs. Competitors

Feature Comparison / **Reporting & Analytics**

	Reporting	Dashboards	Forecasting
Workbooks	84%	83%	83%
Microsoft Dynamics 365	82%	82%	80%
Oracle Fusion Cloud CX / CRM	78%	77%	79%
Oracle On Demand	79%	81%	75%
Salesforce CRM	**87%**	**87%**	**84%**
Sugar Sell	79%	81%	77%
Zoho CRM Plus	79%	86%	77%
GoldMine	73%	75%	70%
Sage CRM	76%	78%	70%
Netsuite	77%	76%	72%
Average	79%	81%	77%

Workbooks vs. Competitors

Feature Comparison / **Mobile & Social**

	Social Collaboration Features	Social Network Integration	Mobile User Support
Workbooks	81%	81%	79%
Microsoft Dynamics 365	78%	79%	78%
Oracle Fusion Cloud CX / CRM	78%		78%
Oracle On Demand			71%
Salesforce CRM	81%	81%	80%
Sugar Sell	77%	77%	78%
Zoho CRM Plus	**82%**	**82%**	**82%**
GoldMine			60%
Sage CRM			63%
Netsuite	62%	60%	65%
Average	77%	77%	73%

*N/A is displayed when fewer than five responses were received for the question.
**A blank box indicates that a seller has selected that they do not offer that feature.

Workbooks vs. Competitors

Feature Comparison / **Platform**

	Customisation	Workflow Capability	User, Role, and Access Management	Performance and Reliability
Workbooks	**87%**	**86%**	87%	87%
Microsoft Dynamics 365	84%	83%	85%	80%
Oracle Fusion Cloud CX / CRM	73%	73%	72%	68%
Oracle On Demand	78%	76%	**88%**	84%
Salesforce CRM	86%	85%	87%	**89%**
Sugar Sell	85%	80%	83%	79%
Zoho CRM Plus	N/A	N/A	N/A	N/A
GoldMine	76%	74%	78%	77%
Sage CRM	72%	68%	74%	71%
Netsuite	81%	75%	76%	77%
Average	80%	78%	81%	79%

Workbooks vs. Competitors

Feature Comparison / **Integration**

	Data Import & Export Tools	Integration APIs
Workbooks	85%	84%
Microsoft Dynamics 365	82%	81%
Oracle Fusion Cloud CX / CRM	67%	67%
Oracle On Demand	82%	78%
Salesforce CRM	**86%**	**87%**
Sugar Sell	79%	79%
Zoho CRM Plus	N/A	N/A
GoldMine	73%	69%
Sage CRM	72%	75%
Netsuite	73%	69%
Average	78%	77%

Workbooks vs. Competitors

Additional Data / **User Adoption and Return on Investment (ROI)**

	User Adoption	Payback Period
	Average User Adoption	Estimated ROI (payback period in months)
Workbooks	76%	**12**
Microsoft Dynamics 365	58%	17
Oracle Fusion Cloud CX / CRM	53%	28
Oracle On Demand	70%	31
Salesforce CRM	73%	19
Sugar Sell	69%	18
Zoho CRM Plus	**86%**	16
GoldMine	80%	16
Sage CRM	71%	25
Netsuite	80%	25
Average	72%	21

Workbooks vs. Competitors

Contenders

Leaders

Salesforce

Microsoft Dynamics 365 Sales

Zoho

Sugar Sell (formerly SugarCRM)

NetSuite

Oracle On Demand

Sage CRM

GoldMine

Workbooks

Market Presence

Niche

High Performers
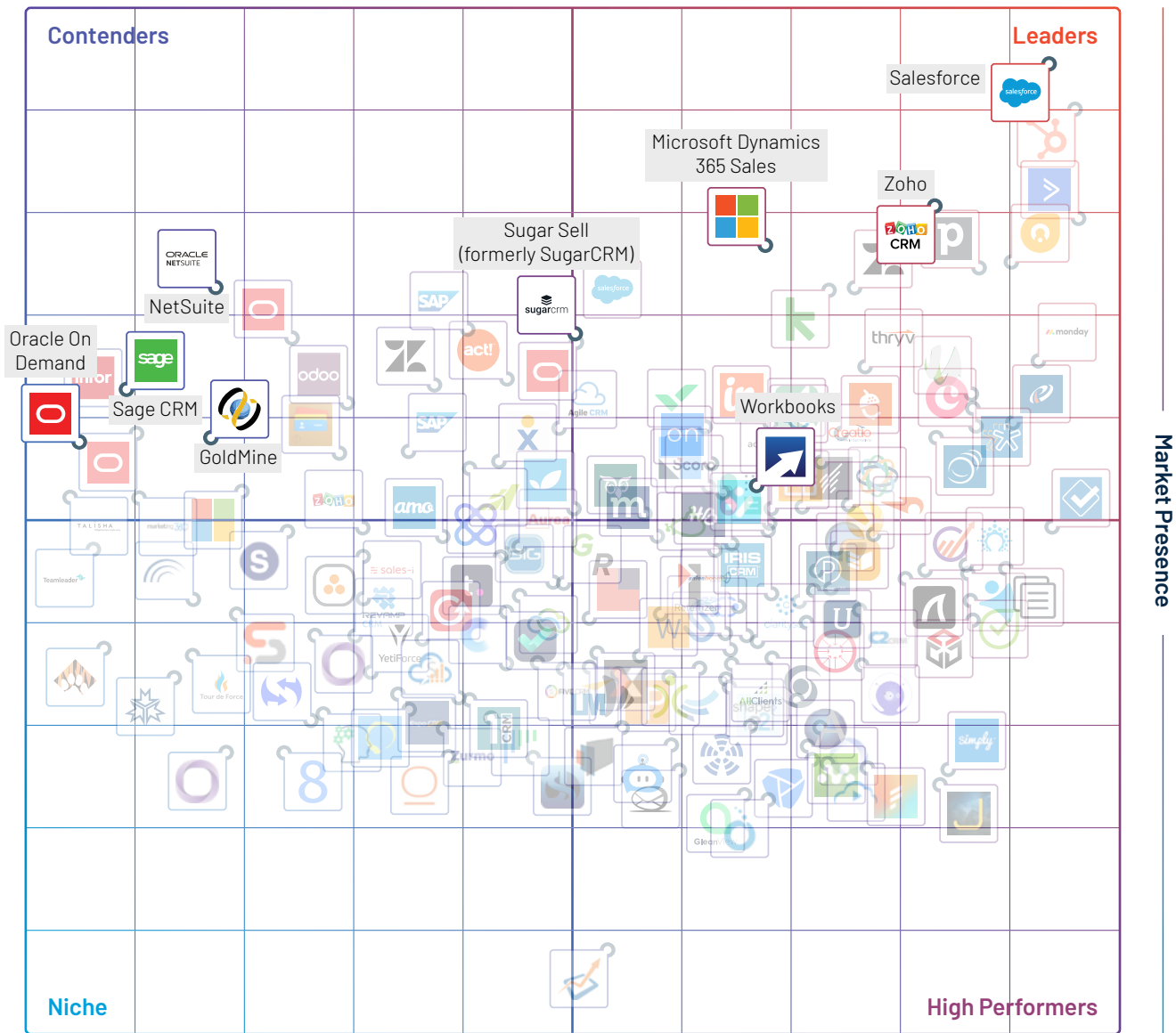
Satisfaction

Grid® Scoring

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 sellers, media, investors, and analysts, the Grid® provides benchmarks for product comparison and market trend analysis.

Grid® Scoring Methodology

G2 rates products and sellers 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 2021 is based on scores calculated using the G2 algorithm v3.0 from reviews collected through June 01, 2021. 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 sellers and the individual products are measured on various criteria. The criteria are listed in order of importance. Products metric receive greater weight than seller metrics

Criteria	Measured For		Metrics
	Product	**Seller**	
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
Seller Age		√	
Employee Satisfaction and Engagement		√	

▶ 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® Methodology

Grid® Categorisation 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 is 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 01, 2021. The ratings may change as the products are further developed, the sellers 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 sellers 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 sellers 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 does not add any subjective input to the ratings, which are determined algorithmically based on data aggregated from publicly available online sources and social networks. sellers 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.