

Workbooks.com vs. Competitors (continued)

Description

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

Data in this document was pulled from reviews submitted up until June 06, 2018.

	Workbooks	SugarCRM	Salesforce CRM	Netsuite CRM	Dynamics 365	GoldMine	Zoho CRM	SAP CRM	Sage CRM	Siebel	Oracle Sales Cloud	Oracle On Demand	Act!	Average
Satisfaction Ratings														
Likely to Recommend	86%	71%	83%	66%	72%	75%	76%	69%	68%	65%	76%	69%	75%	73%
Is the product headed in the right direction?	90%	73%	82%	62%	66%	53%	74%	63%	48%	54%	84%	47%	58%	66%
Meets Requirements	84%	80%	88%	75%	81%	81%	81%	79%	75%	78%	77%	75%	82%	80%
Ease of Admin	84%	80%	80%	69%	77%	77%	79%	72%	72%	64%	74%	73%	77%	75%
Ease of Doing Business With	89%	79%	82%	66%	77%	79%	79%	80%	68%	70%	76%	74%	74%	76%
Quality of Support	88%	78%	80%	68%	75%	79%	74%	74%	69%	72%	75%	69%	76%	75%
Ease of Setup	81%	75%	75%	63%	71%	71%	77%	66%	69%	59%	70%	70%	73%	71%
Ease of Use	85%	77%	81%	67%	75%	79%	81%	65%	73%	68%	83%	73%	80%	76%
NPS	45	3	41	-8	0	9	16	-9	-15	-17	14	-21	19	6

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

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	Workbooks	SugarCRM	Salesforce CRM	Netsuite CRM	Dynamics 365	GoldMine	Zoho CRM	SAP CRM	Sage CRM	Siebel	Oracle Sales Cloud	Oracle On Demand	Act!	Average
Features Comparison														
Opportunity & Pipeline Mgmt.	85%	80%	88%	71%	81%	75%	80%	76%	74%	75%	79%	79%	77%	78%
Partner Relationship Mgmt. (PRM)	83%	79%	83%	68%	79%	N/A	N/A	80%	71%	73%	78%	76%	79%	77%
Task / Activity Management	85%	78%	83%	70%	80%	82%	79%	76%	74%	77%	79%	72%	81%	78%
Desktop Integration	83%	74%	82%	67%	79%	74%	N/A	77%	73%	74%	75%	68%	79%	75%
Territory & Quota Management	81%	71%	80%	65%	76%	69%	73%	79%	71%	73%	73%	72%	72%	73%
Contact & Account Management	86%	83%	88%	76%	83%	85%	85%	79%	72%	77%	79%	78%	86%	81%
Customer Contract Management	83%	79%	84%	72%	81%	N/A	79%	79%	74%	76%	77%	76%	83%	79%
Product & Price List Management	82%	71%	80%	74%	76%	70%	76%	77%	67%	72%	75%	69%	74%	74%
Quote & Order Management	82%	75%	81%	76%	78%	69%	75%	78%	70%	74%	75%	68%	72%	75%
Marketing ROI Analytics	83%	71%	80%	67%	76%	65%	74%	77%	69%	78%	71%	73%	N/A	74%
Campaign Management	81%	70%	81%	63%	75%	67%	75%	75%	74%	75%	79%	72%	73%	74%
Lead Management	83%	80%	85%	72%	78%	76%	81%	79%	73%	76%	79%	73%	79%	78%

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Features Comparison														
Email Marketing	82%	69%	79%	64%	76%	72%	76%	71%	67%	74%	80%	74%	73%	74%
Call Center Features	84%	72%	80%	66%	78%	65%	73%	75%	72%	81%	74%	70%	72%	74%
Support Analytics	84%	75%	82%	73%	81%	70%	76%	78%	68%	78%	74%	74%	N/A	76%
Knowledge Base	83%	79%	83%	68%	80%	73%	76%	81%	72%	76%	75%	79%	78%	77%
Customer Support Portal	83%	79%	81%	71%	79%	75%	75%	80%	73%	76%	71%	78%	72%	76%
Case Management	87%	80%	83%	76%	81%	74%	76%	81%	74%	80%	74%	76%	77%	78%
Forecasting	83%	75%	82%	71%	77%	71%	76%	78%	67%	76%	80%	76%	75%	76%
Dashboards	83%	80%	85%	75%	80%	77%	79%	77%	76%	77%	79%	79%	77%	79%
Reporting	84%	77%	85%	76%	79%	75%	79%	78%	74%	78%	80%	80%	76%	79%
Document & Content Mgmt.	82%	75%	81%	67%	78%	72%	76%	N/A	71%	71%	75%	74%	74%	75%
User, Role, and Access Management	87%	84%	87%	75%	85%	78%	82%	N/A	75%	75%	69%	92%	80%	81%
Workflow Capability	85%	81%	85%	73%	81%	76%	76%	N/A	68%	74%	73%	76%	73%	77%

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Features Comparison														
Output Document Generation	86%	73%	81%	73%	76%	76%	74%	N/A	67%	73%	70%	71%	76%	75%
Customization	87%	86%	87%	80%	83%	77%	78%	N/A	74%	70%	75%	78%	76%	79%
Internationalization	83%	84%	84%	75%	80%	N/A	77%	N/A	73%	73%	79%	83%	71%	78%
Performance and Reliability	88%	77%	89%	77%	77%	78%	81%	N/A	72%	72%	70%	87%	76%	79%
Sandbox / Test Environments	87%	85%	86%	72%	79%	68%	67%	N/A	N/A	74%	79%	81%	66%	77%
Breadth of Partner Applications	78%	77%	89%	68%	77%	69%	71%	71%	68%	74%	69%	65%	74%	73%
Integration APIs	84%	80%	87%	69%	77%	73%	74%	75%	75%	77%	71%	80%	71%	76%
Data Import & Export Tools	85%	79%	N/A	72%	78%	73%	81%	73%	72%	74%	67%	82%	79%	76%

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Pricing

Below you can find pricing editions for Workbooks.com 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.com

FREE Edition (2 users)	CRM Edition	Business Edition
Free	£21 / \$30 / €25 /user/month	£46 / \$65 / €54 /user/month
Community Support Only, Sales, Marketing and Support, Quotes, Orders and Invoices 1 Database Only. 1GB free storage 2 Users, Free for Life	Full CRM edition (excluding Invoicing, Purchase Orders and Supplier Orders functionality). CRM and Business Editions can be mixed	Same as CRM edition, but includes Invoicing, Purchase Orders and Supplier Orders functionality. CRM and Business Editions can be mixed
2 Users Completely Free	30 Day Free Trial	30 Day Free Trial
Free Online Support	Unlimited Users	Unlimited Users

SugarCRM

Sugar Professional	Sugar Enterprise	Sugar Ultimate
\$40 /user/month	\$65 /user/month	\$150 /user/month

Pricing (continued)

Salesforce CRM

Lightning Essentials	Lightning Professional	Lightning Enterprise	Lightning Unlimited
\$25	\$75	\$150	\$300
/user/month	/user/month	/user/month	/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 (continued)

Microsoft Dynamics 365

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.

GoldMine Pricing

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 (continued)

Zoho CRM

<p>Free Edition</p> <p>\$0</p> <p>Free for 3 users</p> <p>https://www.zoho.com/crm/zohocrm-pricing.html</p>	<p>Standard Edition</p> <p>\$12/month</p> <p>per user</p>	<p>Professional Edition</p> <p>\$20/month</p> <p>per user</p>
<p>Enterprise Edition</p> <p>\$35/month</p> <p>per user</p>	<p>Ultimate</p> <p>\$100/month</p> <p>per user</p>	

Sage CRM

<p>Sage CRM Cloud</p> <p>\$39</p> <p>per user per month</p>
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Pricing (continued)

Oracle Sales 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	

Pricing (continued)

Act!

Act! Essentials	Act! Pro	Act! Premium	Act! Premium Plus
\$10 per user/month	\$299.99 per user	\$35 per user/month	\$45 per user/month
Consolidate and manage contacts, activities, notes, and history in one organized place, accessible from anywhere. Easily create, send, and track professional email marketing campaigns and know who to connect with next.	Entry-level, out-of-the-box feature set for individuals. Desktop access.	Full-featured, everywhere access CRM for individuals & teams. Enjoy instant online access to Act! in a modern, secure Cloud environment. Online, offline, and mobile access.	Adaptable CRM that complements your unique business. Unlock the full potential of Act! using Custom Tables in a flexible Cloud environment. Online, offline, and mobile access. Includes Act! Premium features plus:
Web & Mobile	Contact management	Contact management	Custom Tables Manager
Email marketing (500 contacts + Call List)	Sales automation	Sales automation	Industry Template Library
Automatic upgrades	Act! emarketing	Act! emarketing	Private Cloud option
		Act! Insight	
		Act! Connect	
		Act! Companion mobile app	
		Act! API	
		Expert technical support	
		Product upgrades	

Grid® Methodology

Grid® Rating Methodology

The Grid® represents the democratic voice of real software users, rather than the subjective opinion of one analyst. G2 Crowd rates products from the CRM category algorithmically based on data sourced from product reviews shared by G2 Crowd 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 Crowd 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 2018 is based off of scores calculated using the G2 Crowd algorithm v3.0 from reviews collected up until June 06, 2018. 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 Crowd
- ▶ 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 Crowd 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 Crowd'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

Grid® Methodology (continued)

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		✓	

- ▶ 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 Crowd 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 Crowd follows a publicly available [categorization methodology](#). All products appearing on the Grid® have passed through G2 Crowd's categorization methodology and meet G2 Crowd's category standards.

Many terms that appear regularly across G2 Crowd 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 Crowd 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 Crowd up until June 06, 2018. The ratings may change as the products are further developed, the vendors grow, and as additional opinions are shared by users. G2 Crowd 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.

Grid® Methodology (continued)

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 Crowd 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 Crowd 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. 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 Crowd 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 Crowd and share authentic product reviews will accelerate this process.

If a product is not yet listed on G2 Crowd 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.