

Vendor Landscape: CRM Suites for Large Enterprises

Social media integration can make or break a CRM feature set.

Introduction

Adopt a dedicated Customer Relationship Management (CRM) suite for integrated automation of sales, marketing, and service processes. Remember that social is today's true market differentiator: ensure social media integration is sufficient or risk failure.

This Research Is Designed For:

- ✓ Enterprises seeking to select a solution for CRM integrated across sales, marketing, and customer service.
- ✓ Executive-level stakeholders in the following roles:
 - Vice-President of Sales, Marketing, or Customer Service.
 - IT Managers and Directors involved in selecting a CRM solution.

This Research Will Help You:

- ✓ Understand what's new in the CRM market.
- ✓ Evaluate CRM vendors and products for your enterprise needs.
- ✓ Determine which products are most appropriate for particular use cases and scenarios.

The Info-Tech CRM Research Agenda

Info-Tech's CRM research agenda covers CRM suites for small and large enterprises, as well as point solutions in Marketing, Sales, and Customer Service.

Customer Relationship Management Suites

[Vendor Landscape: CRM Suites for Small Enterprises](#)

A variety of vendors now provide CRM solutions aimed at meeting the needs of small to mid-sized enterprises (SMEs).

[Develop a CRM Strategy](#)

Providing world-class experiences across sales, marketing and customer service is a critical differentiator in a competitive marketplace. Create a proper CRM strategy for success.

[Vendor Landscape: CRM Suites for Large Enterprises](#)

For large organizations, having a top-shelf CRM suite is quickly becoming table stakes for interacting with customers.

*You are here

Vendor Landscapes for Marketing, Sales, and Customer Service Point Solutions

Marketing

- [Social Media Management Platforms \(SMMP\)](#)
- [Email Marketing Services](#)
- [Marketing Automation Suites](#)

Sales

- [Lead Management Automation](#)

Customer Service

- [Customer Service Management](#)
- [Customer Service Knowledge Management](#)
- [Field Service Automation](#)

Executive Summary

Info-Tech evaluated eight competitors in the large enterprise CRM market, including the following notable performers:

Champions:

- **Salesforce.com** has become a CRM standard against which most of the companies compare their options.
- **SalesLogix**'s affordable pricing and usability allow the product to rise above competitors in the space.
- **SAP CRM** offers a comprehensive feature set at a decent price, and has the reach and channel strength to back it.

Value Award:

- **SalesLogix** provides a balance of price and feature complexity, remaining strong on features across the board.

Trend Setter Award:

- **Pegasystems**' product uses "Klout score"-like functionality to evaluate customers' level of social influence. The data is then used behind the scenes for queuing and agent-facing suggestions on how to best approach the customer. The vendor's overall social media integration is exceptional.

Info-Tech Insight



1. Lack of social creates a ripple effect hurting vendors' commodity features:

By year 2013, Info-Tech expected vendors to incorporate social capabilities in their commodity sales, marketing, and service management features. Some social capabilities are still unavailable from certain vendors or they require third-party add-ons. Organizations may need to acquire these capabilities elsewhere.

2. Mobile support is improving:

This year, Info-Tech saw an improvement in mobile capabilities on the market.

3. SaaS is the norm, not the exception:

The majority of vendors profiled by Info-Tech offer hosted deployment models. Some vendors (e.g. Salesforce.com) forego the on-premise deployment altogether.

Large Enterprise CRM Market Overview

How it got here

- The CRM market began in the 1980s with software designed for automating customer interactions in the call center and basic contact management software. In the 1990s, these products matured with Sales Force Automation (SFA) tools.
- During the late 1990s and mid-2000s, integrated CRM suites with comprehensive feature sets were extremely popular with a variety of enterprises. In the latter half of the 2000s, organizations put new emphasis on a common suite with services that could be added. Software-as-a-Service (SaaS) became the dominant deployment method.
- Most recently, organizations began to realize the value of extending mobile technologies to sales reps, marketers, and service agents. The rise of social media among consumers, along with higher requirements for usability on mobile and touch devices, became top opportunities for vendor differentiation. Salesforce's acquisition of Radian 6 (today's Marketing Cloud) set a benchmark for social capabilities in the CRM space.

Where it's going

- Although there exists some differentiation on the quality and quantity of mobile solutions offered by CRM vendors, last year saw significant improvements in the mobile capabilities on the market. Cutting-edge mobile technologies include browser-independent and tablet-optimized applications, as well as dedicated apps that leverage native device capabilities. Usability is expected to remain a differentiator for CRM vendors.
- This year, Info-Tech included a mandatory social component in its evaluation of sales, marketing, and service management features for all CRM vendors. As a result, deteriorating performance was seen in what should otherwise be commodity areas by 2013. Lack of features such as social case management, social listening, and property management created a vast spread among vendors in the feature categories.
- Info-Tech predicts that CRM players will continue to develop robust social capabilities or acquire standalone social management vendors to level the playing field.

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. For example, account management is becoming a table-stakes capability. Focus on the social component of sales, marketing, and service management features to get the best fit for your requirements. While most vendors have some level of reactive social capability, proactive listening and engagement features are lacking. Be prepared to supplement these capabilities with third-party solutions.

CRM Vendor selection / knock-out criteria: market share, mind share, and platform coverage

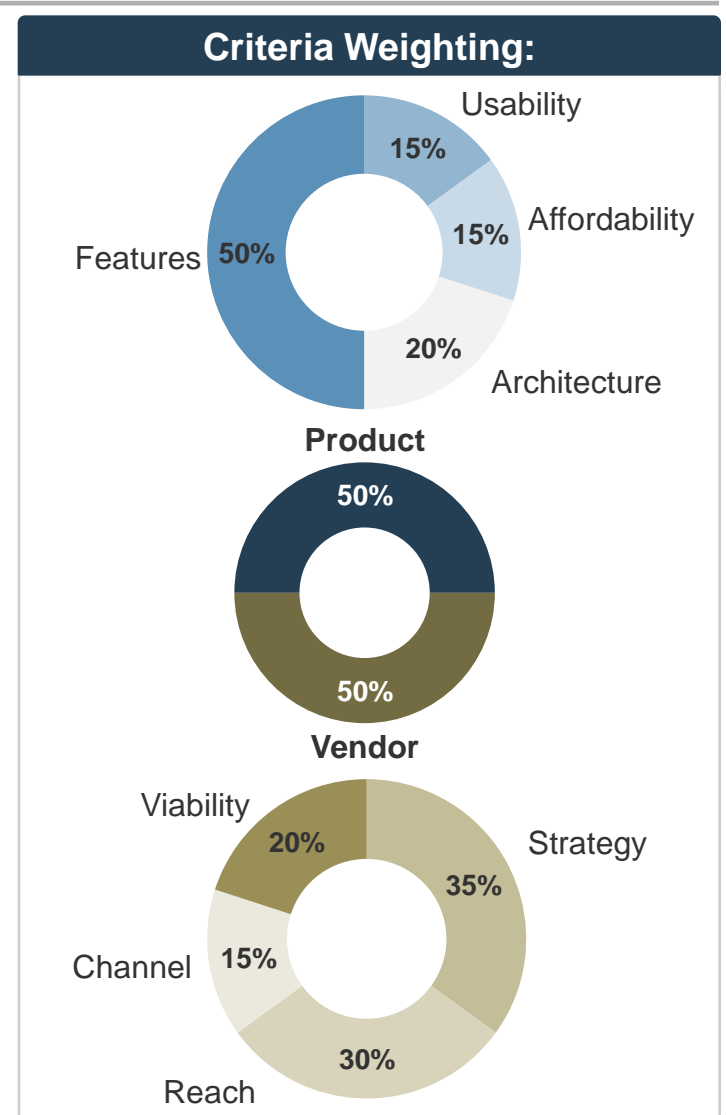
- Some of the forward-looking trends in the CRM market include emphasis on newer channels like social and mobile, collaboration, and knowledge management.
- For this Vendor Landscape, Info-Tech focused on those vendors that provide a 360-degree view of the customer across marketing, sales, and customer service, and that have a strong market presence among large enterprises.

Included in this Vendor Landscape:

- **Infor Epiphany:** A vendor that historically maintained a strong focus on the marketing business process domain.
- **MS Dynamics CRM:** A CRM mainstay, Dynamics CRM is well-known for interoperability with other Microsoft products.
- **Onyx CRM:** Previously known as Consona Onyx, the product is now part of the Aptean product family.
- **Oracle Siebel CRM:** A highly tailorable CRM solution with an extensive feature set and exceptional vendor credentials.
- **Pegasystems:** A product with strong social media integration features and excellent workflow functionality.
- **SalesLogix:** SalesLogix is an affordable product with strong architecture and mobile features.
- **Salesforce.com:** The dominant cloud-only CRM solution that serves as an industry benchmark for CRM capabilities.
- **SAP CRM:** Excellent ERP integrating capabilities differentiate this viable vendor from most competitors.

Large enterprise CRM criteria & weighting factors

Product Evaluation Criteria	
Features	The solution provides basic and advanced feature/functionality.
Usability	The solution is intuitive and easy to use, especially on mobile and touch devices.
Affordability	The three year TCO of the solution is economical.
Architecture	The delivery method of the solution aligns with what is expected within the space.
Vendor Evaluation Criteria	
Viability	Vendor is profitable, knowledgeable, and will be around for the long-term.
Strategy	Vendor is committed to the space and has a future product and portfolio roadmap.
Reach	Vendor offers global coverage and is able to sell and provide post-sales support.
Channel	Vendor channel strategy is appropriate and the channels themselves are strong.



The Info-Tech CRM Vendor Landscape

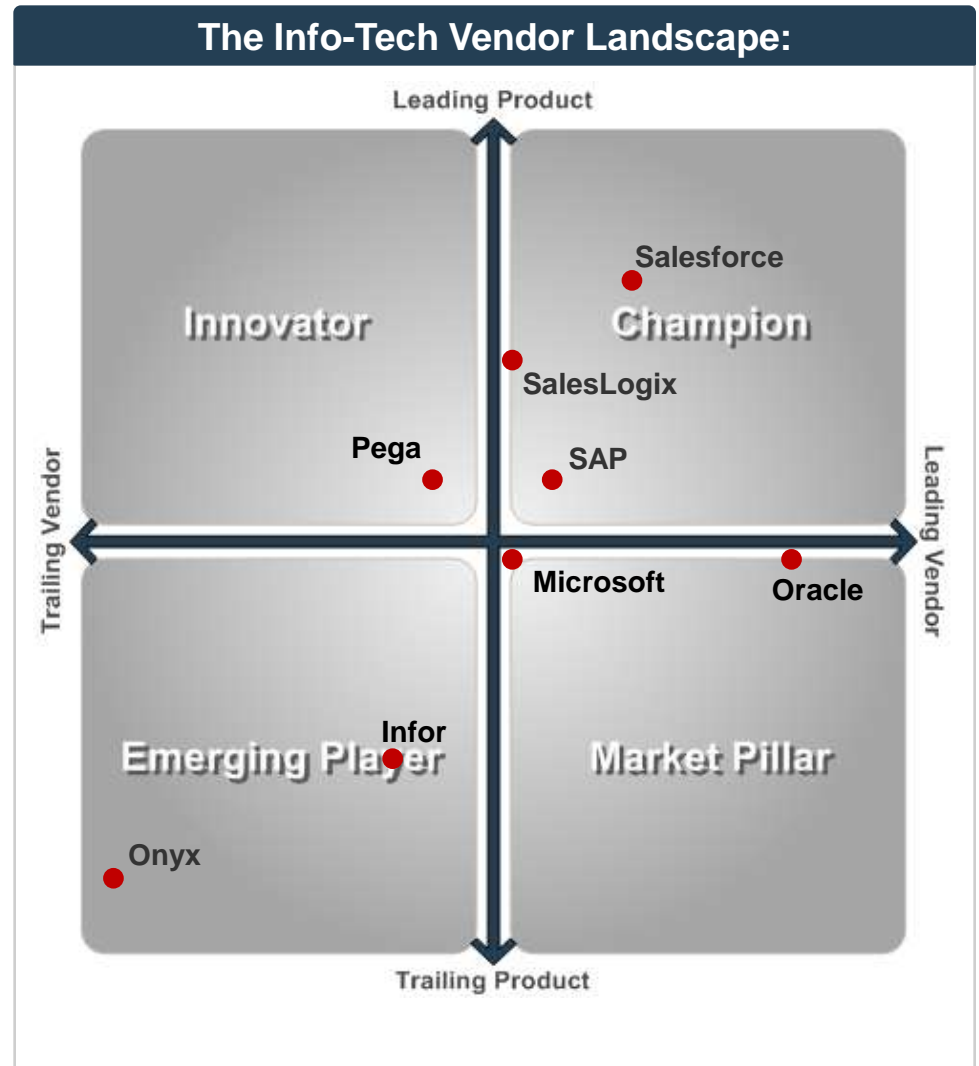
The Zones of the Landscape

Champions receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

Market Pillars are established players with very strong vendor credentials, but with more average product scores.

Innovators have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

Emerging Players are newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, but score lower relative to market Champions.



For an explanation of how the Info-Tech Vendor Landscape is created, see [Information Presentation – Vendor Landscape](#) in the Appendix.

Balance individual strengths to find the best fit for your enterprise

	Product					Vendor				
	Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
Infor Epiphany										
MS Dynamics CRM										
Onyx CRM										
Oracle Siebel CRM										
Pegasystems										
SalesLogix										
Salesforce.com										
SAP CRM										

Legend	=Exemplary	=Good	=Adequate	=Inadequate	=Poor
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For an explanation of how the Info-Tech Harvey Balls are calculated, see [Information Presentation – Criteria Scores \(Harvey Balls\)](#) in the Appendix.

The Info-Tech CRM Value Index

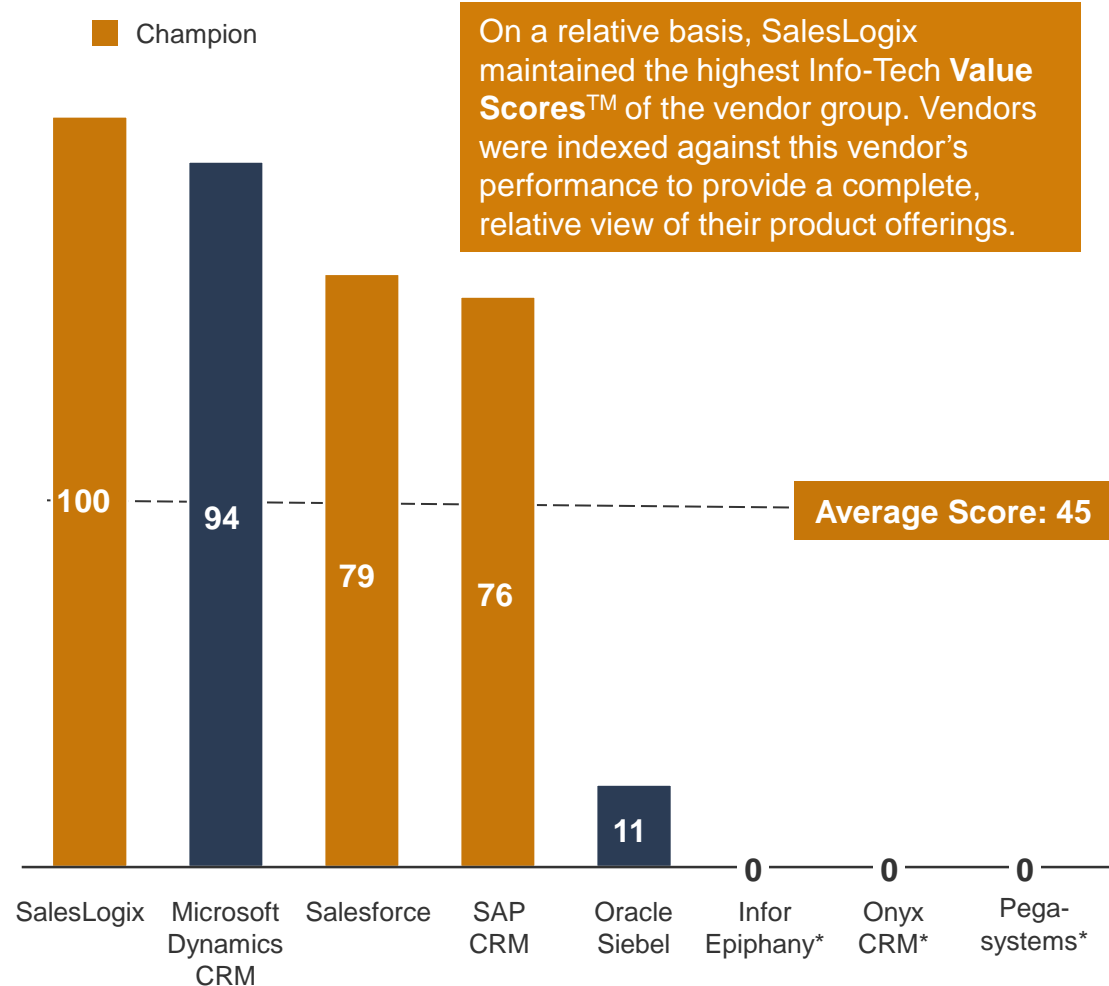
What Is a Value Score?

The Value Score indexes each vendor's product offering and business strength **relative to its price point**. It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

*The vendor declined to provide pricing and publically available pricing could not be found



For an explanation of how Price is determined, see [Information Presentation – Price Evaluation](#) in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see [Information Presentation – Value Index](#) in the Appendix.

Info-Tech evaluated a range of features: basic points were awarded for table stakes, more for advanced functionality*

Feature	Basic/Adv.	What we looked for:
Account Management	Basic	Customizable records with customer demographic information, account history, and billing information.
	Advanced	Contact de-duplication. Advanced field management tools. Document linking. Embedded maps.
Call Center Management	Basic	Computer-Telephony Integration for bringing call information into the CRM suite.
	Advanced	Call recording, call scripting, queuing, and Interactive Voice Response (IVR).
Collaboration	Basic	Employee-to-employee collaboration, team selling, email integration and management.
	Advanced	Employee activity feeds. Agent-to-customer, customer-to-customer, and partner collaboration tools.
Event Management	Basic	Ability to set up and host events – automatic email distribution and RSVP tracking.
	Advanced	Social media event integration; budgeting and event project management tools.
Knowledge Management	Basic	Basic knowledgebase, templates, and search capabilities.
	Advanced	Multi-channel Knowledge Base (ideally including video), inference engine, indexing of external content.
Reporting and Analytics	Basic	User-configurable dashboards for basic metrics.
	Advanced	In-depth and predictive modelling, dashboards for a variety of audiences.
Sell-side E-commerce	Basic	Web portals, quoting capabilities.
	Advanced	Order tracking and fulfillment, rapid deployment templates for e-commerce sites.
Workflow Management	Basic	Text or code-based workflow designer.
	Advanced	Visual workflow designer for multiple business process domains.

*Info-Tech scored each vendor's features on a granular scale. Vendors were given partial marks for basic and advanced features, summing up to 1.0 if all the advanced criteria were satisfied. See [appendix](#) for scoring methodology.

Info-Tech evaluated a range of features on their basic, advanced, and social criteria*

Feature	Basic/Adv.	What we looked for:
Customer Service Management	Basic	Case and ticket management; automatic escalation rules.
	Advanced	Advanced service resolution tools, multi-channel integration (email, chat, telephony, self-serve portal).
	Social	In-band response capabilities (Twitter, Facebook). Social listening for proactive customer service.
Marketing Management	Basic	Marketing campaign management and tracking; email campaigns with lead targeting.
	Advanced	Multi-channel campaign management. Budget tracking. "Click to lead" capabilities. Campaign analytics.
	Social	Social property management (e.g. company Facebook page). Social keyword mining. Social analytics dashboard.
Sales Management	Basic	Lead generation and pipeline management. Team-based and geography-based assignment.
	Advanced	Sales compensation management, contract management, reminders and workflow tools.
	Social	Ability to pull customer information from the social cloud. LinkedIn is of primary importance, but Facebook and Twitter were evaluated as well.

Scoring Methodology

Info-Tech scored each vendor's features on a granular scale. Vendors were given partial marks for basic, advanced, and social features (each worth one third of the feature score). Full marks were assigned if all the three components were fully satisfied. Partial marks were deducted for each feature gap.

For an explanation of how Advanced Features are determined, see [Information Presentation – Feature Ranks \(Stop Lights\)](#) in the Appendix.

Each vendor offers a different feature set; concentrate on what your organization needs

	Evaluated Features										
	Account Mgmt.	Call Center	Collab.	Service	Event Mgmt.	Knowledge Mgmt.	Marketing	Reporting & Analytics	Sales	E-commerce	Workflow Mgmt.
Infor Epiphany											
MS Dynamics CRM											
Onyx CRM											
Oracle Siebel CRM											
Pegasystems											
SalesLogix											
Salesforce.com											
SAP CRM											
Legend	=Feature fully present				=Feature partially present / pending				=Feature Unsatisfactory		

For an explanation of how Advanced Features are determined, see [Information Presentation – Feature Ranks \(Stop Lights\)](#) in the Appendix.

Scenario: Business Process Domain Focus

Different vendors have different strengths. Know what products are strongest for which business process domains.

1 Domain focus

2

3

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use-cases come to the forefront. Whether those use-cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use-cases as Scenarios, and calls attention to them where they exist.

Marketing



Sales



Customer Service



For an explanation of how Scenarios are determined, see [Information Presentation – Scenarios](#) in the Appendix.

Scenario: Industry Focus

Depending on your organization's industry vertical, a certain CRM solution may be the most appropriate for your needs.

2 Industry Focus

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use-cases come to the forefront. Whether those use-cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use-cases as Scenarios, and calls attention to them where they exist.

Financial Services

INFOR™ Infor is particularly popular among financial services organizations.

Government Services

ORACLE® Siebel CRM Public Sector is a reliable tool used by government organizations to enable centralized government contact centers and to provide a view of citizens across departments and agencies.

Consumer Packaged Goods

APTEAN
YOUR SUCCESS. OUR PASSION. Aptean's Onyx product has a separate offering for Consumer Packaged goods.

For an explanation of how Scenarios are determined, see [Information Presentation – Scenarios](#) in the Appendix.

Scenario: Mobile Support

These three vendors offer exemplary support for mobile and touch devices out-of-the-box.

1

2

3 Mobile Support

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use-cases come to the forefront. Whether those use-cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use-cases as Scenarios, and calls attention to them where they exist.

Exemplary Performers



Salesforce has a comprehensive mobile feature set that includes HTML5 access and native apps via Salesforce Touch, Salesforce Mobile, and Mobile Dashboards. The vendor claims that the product is faster on mobile devices than on desktop computers.



SalesLogix's HTML5 mobile features are device-independent but device-aware. The layout automatically adapts to different screen sizes and orientation. A native iPad application is on the roadmap as well.



Pega's mobile features include native applications for a variety of devices, as well as HTML5 access to the suite. The HTML5 application is device-aware and leverages native device functionality (e.g. camera).

For an explanation of how Scenarios are determined, see [Information Presentation – Scenarios](#) in the Appendix.

Salesforce is a benchmark standard in the CRM space for its usability and features



Champion

Product: Sales and Service Cloud (Enterprise), Marketing Cloud Corporate

Employees: 9,300+

Headquarters: San Francisco, CA

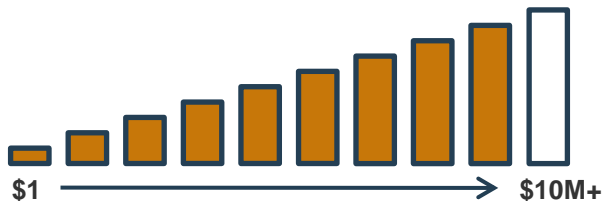
Website: Salesforce.com

Founded: 1999

Presence: NYSE: CRM, FY12: \$2.27B



3 year TCO for this solution falls into pricing tier 9, between \$5,000,000 and \$10,000,000



Pricing provided by vendor

Overview

- Salesforce was one of the first companies to embrace the Cloud for delivering CRM solutions. The company has over 100,000 clients today and offers a wide range of geographical spread for both sales and support.

Strengths

- Salesforce Touch, Salesforce Mobile, and Mobile Dashboards provide an exemplary mobile feature set.
- Marketing Cloud's social features across sales, marketing, and service far surpass those of competitors. To understand the costs and benefits of adding the product, see Appendix A.
- The strong service and knowledge management feature set includes a multi-media knowledge base that is KCS5 certified and Service Console, a universal desktop.
- Excellent collaboration features include integration with Chatter for internal collaboration, a partner portal, and other tools.

Challenges

- The event management add-on (available via AppExchange) cannot be integrated with marketing modules out-of-the-box.
- Sell-side e-commerce functionality is limited to real-time quotes engine and product tracking.
- The lack of on-premise deployment option diminishes the otherwise strong architecture (which is particularly robust on integrations). Compliance-regulated markets are still concerned about storing data in the Cloud.

Salesforce has features that no other vendor can compete with, especially when it comes to social



Value Index

79
3rd out of 8

Product					Vendor				
Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel

Salesforce's Social Media Features

Sales	Marketing	Customer Service
 Integration with social media sites for account information *Up to 20 social presences **Social listening of up to 1.5M mentions per month	 Social property management* Social listening** Social analytics	 In-band response to social channels
■ Included features ■ Features unavailable / available via add-on		

Features

Account Mgmt.	Call Center	Collab.	Service	Event Mgmt.	Knowledge Mgmt.	Marketing	Reporting & Analytics	Sales	E-commerce	Workflow mgmt.

Info-Tech Recommends:

For many large enterprises, adding Marketing Cloud on top of Sales and Service Cloud licenses will only be a marginal investment. For example, based on Info-Tech's pricing scenario (Appendix B), Marketing Cloud comprises under 15% of the total licensing costs. See Appendix A for more detail on the benefits and costs of Marketing Cloud.

SalesLogix combines strong account management and enterprise-class analytics with high usability

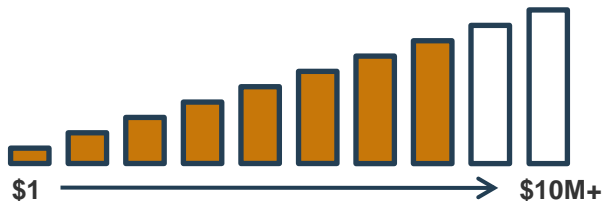


Champion

Product: SalesLogix
Employees: 300
Headquarters: Denver, CO
Website: <http://www.swiftpage.com/>
Founded: 2001
Presence: Private



3 year TCO for this solution falls into pricing tier 8, between \$2,500,000 and \$5,000,000



Pricing provided by vendor

Overview

- SalesLogix is known for its reliability in the ERP and CRM markets and a vast network of channel partners. SalesLogix targets divisions of enterprises and smaller firms with high product complexity.

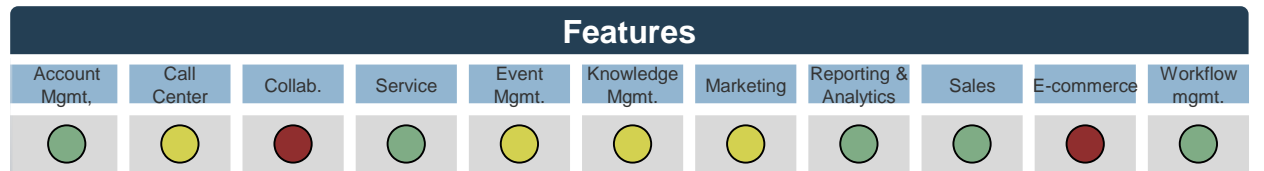
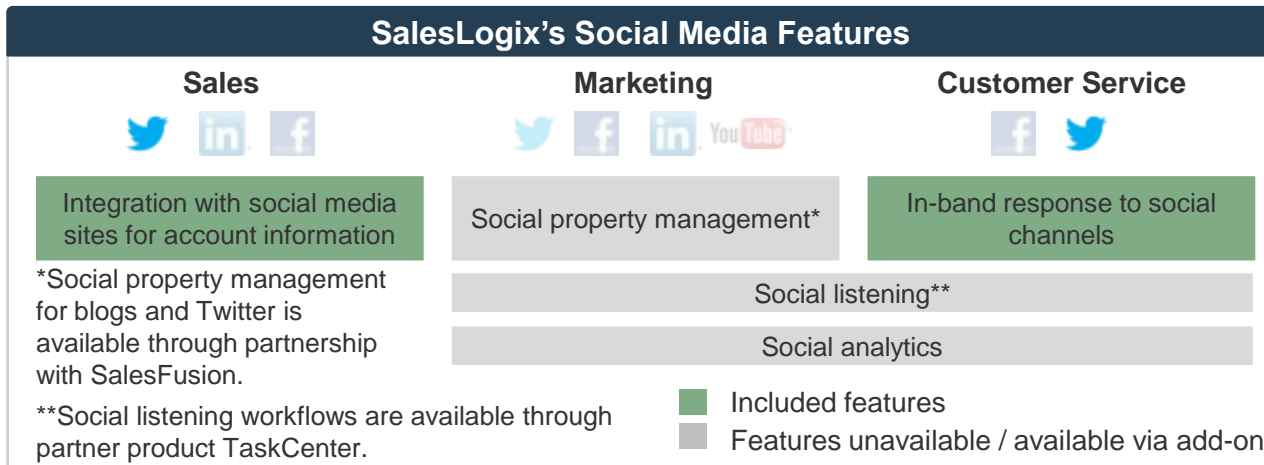
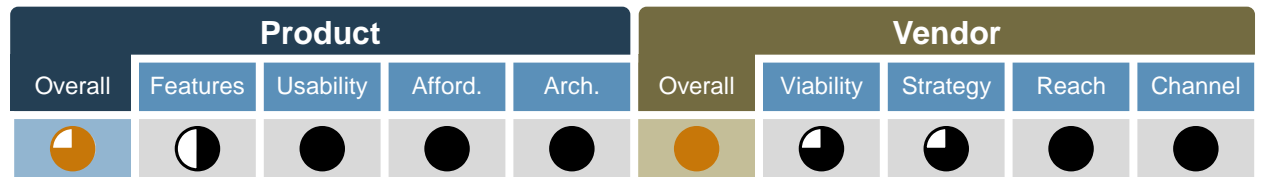
Strengths

- Strong account management features include a visual timeline and a hierarchical model for managing account sub-branches.
- SalesLogix's Advanced Analytics combine data analysis from multiple sources, including Sage ERP and the Web.
- High usability is attributed to a clean new interface with scroll bars, grids, drag-and-drop filter boxes, and hover over functionality. The mobile product is based on HTML5 and is device-independent but device-aware. The mobile roadmap includes a native app for iPad and complete tablet optimization.

Challenges

- Out-of-the-box collaboration features are limited to Outlook integration and team-based selling. However, SalesLogix's roadmap emphasizes improved social collaboration, and integration with Tibbr solution by Tibco for enhanced collaboration is available today. Tibbr integration adds the ability for SalesLogix users that work in teams to collaborate using an interface with a familiar social media look and feel.
- Much of the social functionality is dependent on the partnership with SalesFusion, including social media features for marketing.
- Event management is only available through API integration.

SalesLogix offers a capable yet inexpensive blend of CRM functionality and a clear product roadmap



Info-Tech Recommends:

The product is a popular choice among complex organizations of smaller size with high compliance regulations. For example, a pharmaceutical company with a small customer base, but complex sales processes would likely see a lot of value. Other candidate industries include financial services, insurance, and manufacturing.

SAP CRM is an industry veteran with a comprehensive CRM feature set

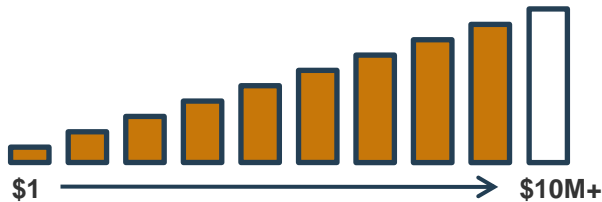


Champion

Product: SAP CRM
Employees: 55,765
Headquarters: Walldorf, Germany
Website: SAP.com
Founded: 1972
Presence: NYSE: SAP
FY11: €14M



3 year TCO for this solution falls into pricing tier 9, between \$5,000,000 and \$10,000,000



Pricing solicited from public sources

Overview

- SAP is the third largest independent software manufacturer in the world, with a presence in over 120 countries. Having been in the industry for over 40 years, SAP is perhaps best known for its ERP application, SAP ERP.

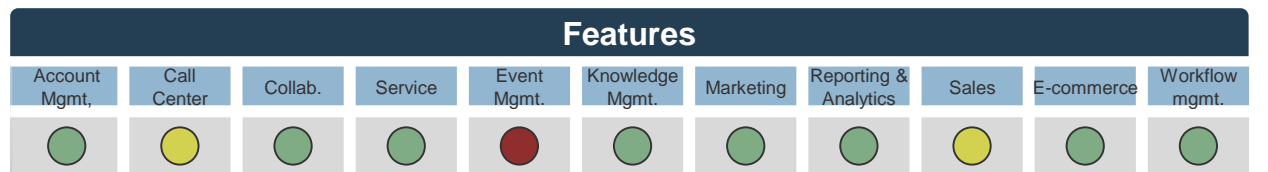
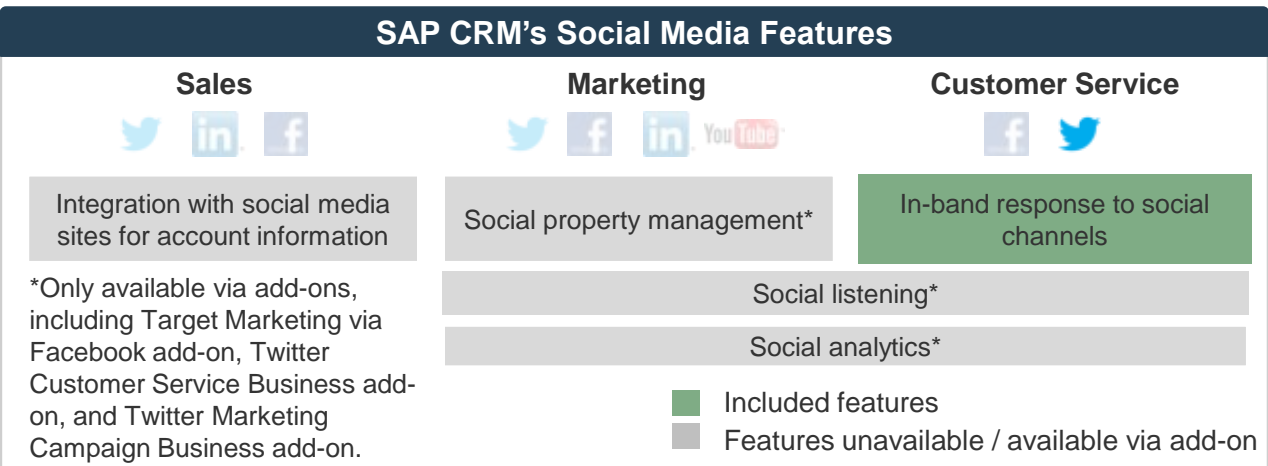
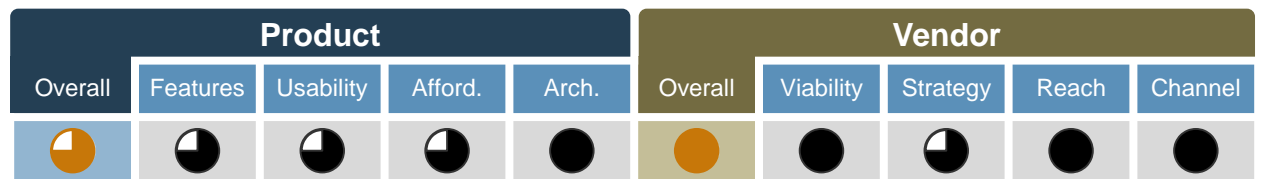
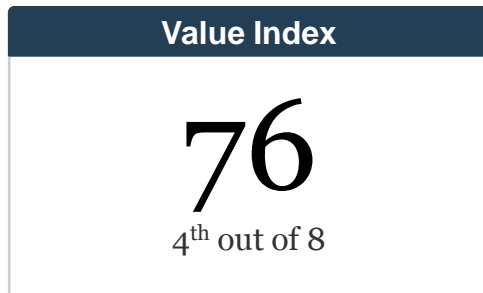
Strengths

- Strong marketing management includes targeted offers, budget management tools, customer trend analysis, and loyalty rewards program rules.
- SAP JAM is a new collaboration add-on, primarily aimed at collaborative opportunity management. The tool also strengthens the suite's knowledge management and content sharing (including video and screen recordings).
- Strong e-commerce features are available for quote generation, order tracking, and accounts receivable processes.
- Advanced workflow wizards are included for various processes.

Challenges

- SAP licensing is highly complex, with some basic features requiring add-on fees (e.g. CTI). IVR is available out-of-the-box.
- Social features, although rather advanced, are only available through the SAP Social OnDemand add-on; mobile applications require additional fees as well.
- Event management is limited within the suite, but additional functionality can be obtained with SAP Supply Chain Management (SCM).

SAP CRM has a robust feature set, but its dependency upon the broader SAP ecosystem can be a challenge



Info-Tech Recommends:

Organizations already using SAP enterprise applications should strongly consider SAP CRM; those without a firm understanding of organizational processes will find themselves overwhelmed.

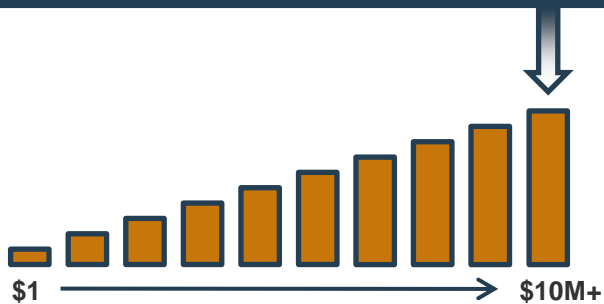
Siebel CRM remains a market leader with strong analytics, e-commerce, and account management features

Market Pillar

Product: Oracle Siebel CRM
Employees: 115,000+
Headquarters: Redwood Shores, CA
Website: Oracle.com
Founded: 1977
Presence: NASDAQ: ORCL
FY12: \$13.7B

ORACLE®

3 year TCO for this solution falls into pricing tier 10, greater than \$10,000,000



Pricing solicited from public sources

Overview

- Oracle has top vendor credentials, with 390,000 customers in 145 countries. Siebel CRM helped define the CRM suite market and holds a wealth of experience serving large organizations.

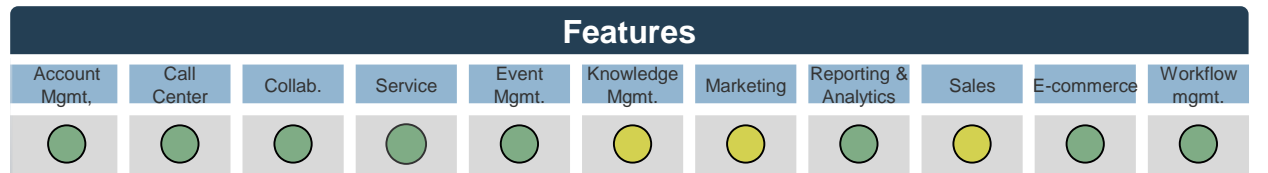
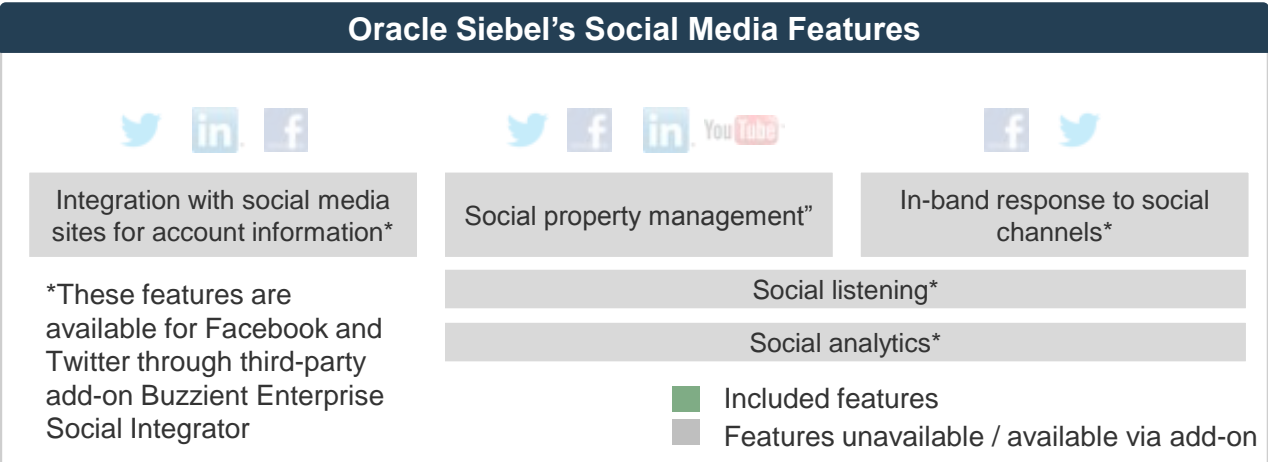
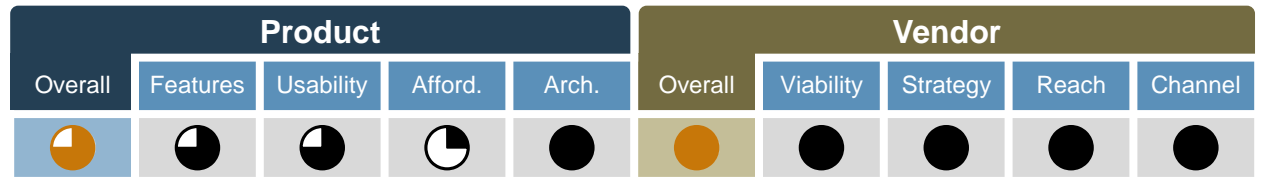
Strengths

- Account management features have historically been elite.
- The product provides exceptional analytics, including e-billing (cost center based reporting) and “what if” analysis.
- Siebel’s comprehensive e-commerce capabilities include advanced features such as targeted up-sell and cross-sell messages, order templates, and price analytics.
- Siebel’s out-of-the-box event management is exemplary. Different event types can be planned and executed with configurable websites for registration and payment, post-event results analysis, and lead follow-up.

Challenges

- A lot of important social features are not provided out-of-the-box, but are available through Siebel’s partnership with Buzzient.
- Relative to competitors in the space, Siebel CRM’s user interface is unsatisfactory.
- Siebel offers a multitude of mobile products (Siebel Handheld), but they are add-ons. Customers can purchase vertical-specific mobile products.

Oracle's Siebel CRM has everything your organization needs, much it doesn't need, and a steep price



Info-Tech Recommends:

Siebel CRM is extremely advanced – however, only organizations with complex and well-defined domain processes will be able to justify the cost.

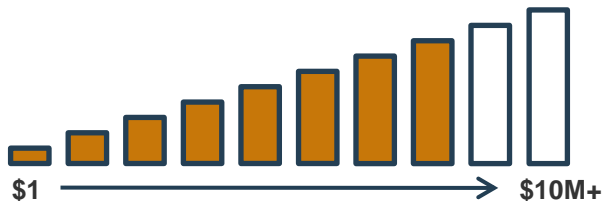
Dynamics CRM has a decent price tag, but is behind competitors in social and mobile capabilities

Market Pillar

Product: Microsoft Dynamics CRM (December 2012 Update)
Employees: 90,000
Headquarters: Redmond, WA
Website: Microsoft.com
Founded: 1975
Presence: NASDAQ: MSFT, FY12: \$73.72B



3 year TCO for this solution falls into pricing tier 8, between \$2,500,000 and \$5,000,000



Pricing solicited from public sources

Overview

- Microsoft's uncontested global reach, combined with Dynamics' competitive pricing, makes Dynamics CRM a popular choice for organizations of all sizes. The December 2012 release puts an emphasis on improved user experience through strong collaboration features and an updated UI.

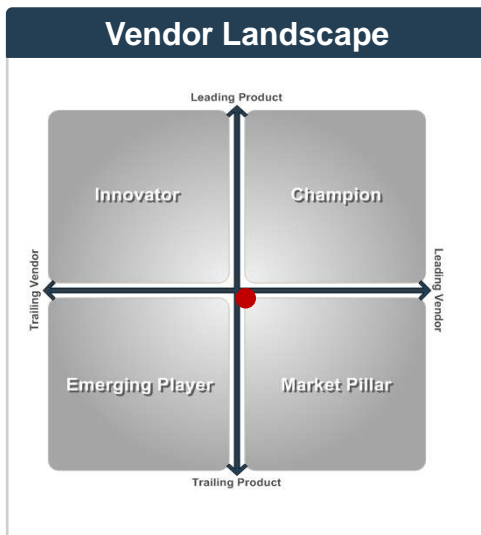
Strengths

- The new sales best practice processes include pre-defined steps and enhanced team-based selling (e.g. role distinctions between influencers and decision-makers). Similar best practice processes are available for service as well.
- Dynamics offers very advanced workflows and call center management features.
- New connector with Yammer allows for sophisticated employee-to-employee collaboration, while Skype integration allows for effective agent-to-customer interactions.

Challenges

- Dynamics CRM remains weak on social features for marketing, sales, and service. Although these are supported by third parties (with a particular strong social ecosystem), the disadvantage puts Microsoft behind many competitors who offer advanced social capability out-of-the-box.
- Basic mobile features, such as browser flexibility, have been delayed for at least three quarters by December 2012. This precedent undermines Info-Tech's confidence in Microsoft's focus on Dynamics CRM.

Microsoft is a good vendor choice for many; Dynamics CRM is not a suitable product choice for everyone



Value Index

94
2st out of 8

Product					Vendor				
Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel

Microsoft Dynamics CRM's Social Media Features

- Integration with social media sites for account information*
 - *Some integration with social media for sales is available via add-on Social Accelerator
- Social property management
- In-band response to social channels
- Social listening
- Social analytics

■ Included features
■ Features unavailable / available via add-on

Features

Account Mgmt.	Call Center	Collab.	Service	Event Mgmt.	Knowledge Mgmt.	Marketing	Reporting & Analytics	Sales	E-commerce	Workflow mgmt.

Info-Tech Recommends:

Mid-market or large firms that rely heavily on Microsoft for other applications may find Dynamics to be a good choice, but beware that the product will likely need to be augmented for social and mobile capabilities.

Decades of expertise in business process management allow Pega to offer unmatched workflow capabilities



Innovator

Product: Pegasystems Sales Force Automation, Next-Best-Action Marketing, Customer Service

Employees: 2,000+

Headquarters: Cambridge, MA

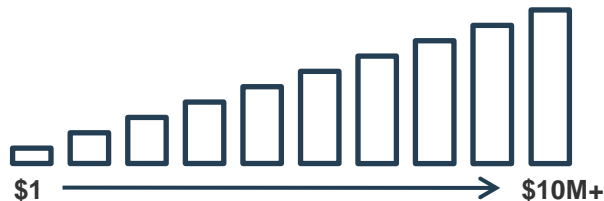
Website: Pega.com

Founded: 1983

Presence: NASDAQ: PEGA,
FY12: \$317M



The vendor declined to provide pricing, and publicly available pricing could not be found



Overview

- Since Pega's foundation in 1983, its initial focus was on Business Process Management. Today, the company's CRM portfolio constitutes about a third of its revenue and is comprised of marketing, sales, and service capabilities built upon a unified platform. Pega has an impressive global client base in dozens of industries.

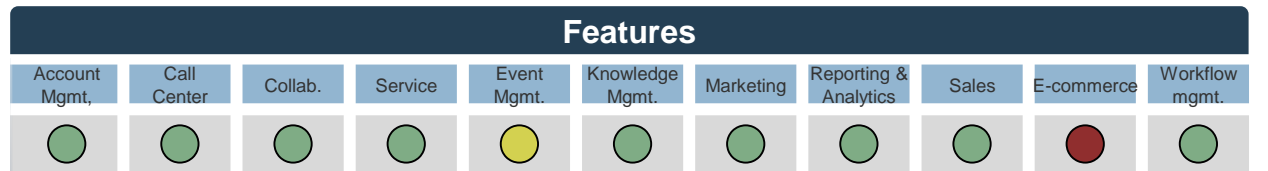
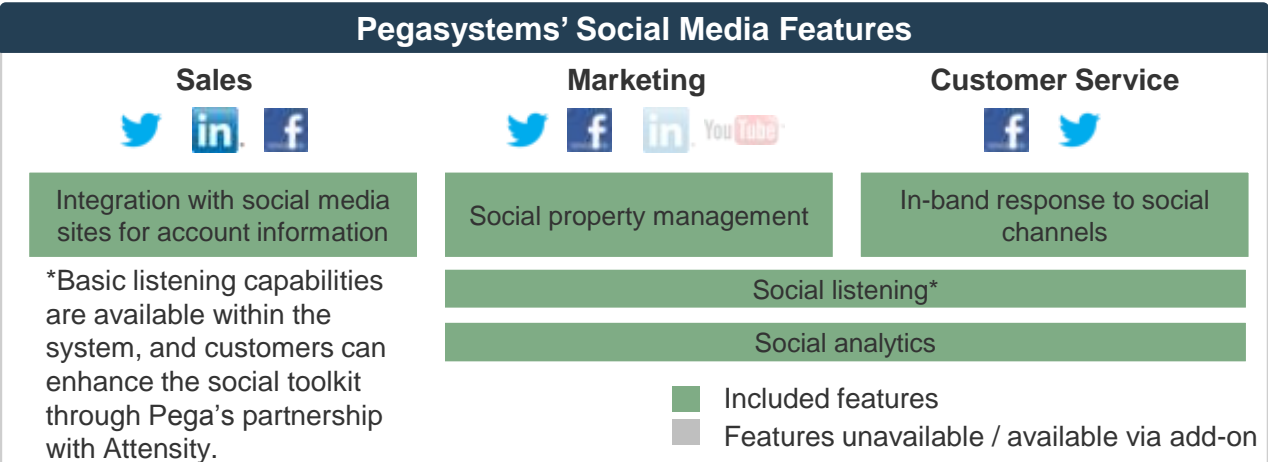
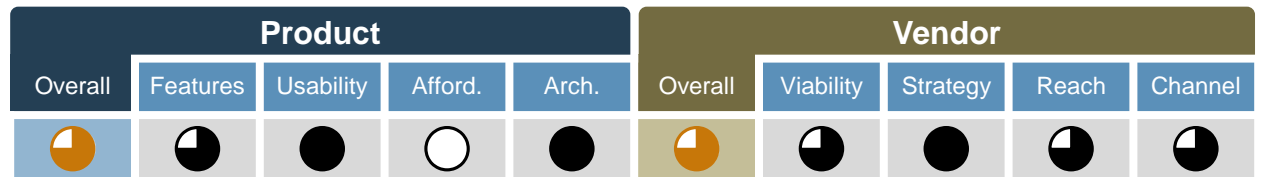
Strengths

- Out-of-the-box social listening capabilities are integrated into Pega's contextual workflows (a historical strength of the suite).
- Pega's marketing product goes beyond expectations by providing the ability to test the potential impact of campaigns. Predictive analytics allow users to determine the best time, offer, and interaction channel for specific customers or prospects.
- Pega allows for sophisticated queuing and decision making based on the social influence of each customer. The system enables easy transitions between interaction channels (e.g. conversations can begin on Facebook and continue on Skype).

Challenges

- Since Pega does not target verticals that require e-commerce integration (e.g. retail), no e-commerce functionality is currently available.
- No specific capabilities are available for event management. Activity flows for events can be created through the system's marketing operations features.

Pegasystems is a viable choice for many organizations, especially those looking for advanced social capabilities



Info-Tech Recommends:

With a possible exception of retail, many industry verticals will find Pega's product a good solution for their needs. The vendor's exceptional performance in marketing management makes it a clear winner for organizations with sophisticated marketing needs.

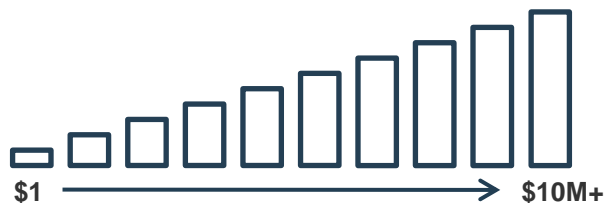
Exceptional marketing management functionality makes Infor a good choice for a marketing-driven organization

Emerging Player

Product: Infor Epiphany
Employees: 12,000+
Headquarters: New York, NY
Website: Infor.com
Founded: 2002
Presence: Private

INFOR™

The vendor declined to provide pricing, and publicly available pricing could not be found



Overview

- Although Infor was founded in 2002, Epiphany has a longer CRM track record dating back to the early 1990s. Infor's recent partnership with Salesforce will allow customers to strengthen their social tool-set through integration with Radian 6.

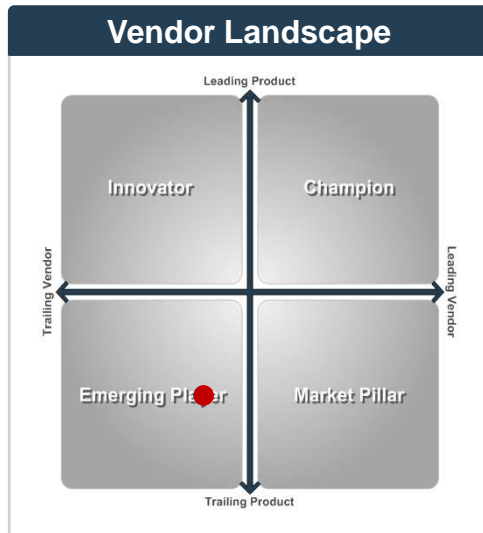
Strengths

- Epiphany has been historically very strong on the marketing feature set. The product provides collaborative production, budget controls, as well as digital brand asset management.
- Infor Workflow (an add-on) provides good workflow functionality that allows users to configure processes using drag and drop actions. The tool allows workgroups to define their own workflows, as well as to set up restrictions for change making.
- The comprehensive multi-channel integration for service includes Twitter, Facebook, LinkedIn, and more.

Challenges

- Epiphany is a browser-based solution that is primarily available on-premise or through managed hosting. No multi-tenant SaaS offering is currently available.
- Sales features are not as extensive as those of competitors; sell-side e-commerce features are only available through third-party integrations.
- Employee-to-employee collaboration is unavailable, although Infor offers best-of-breed agent-to-customer collaboration.
- The mobile product, called Road Warrior, is an add-on solution.

Although marketing features are strong, some of Infor's social features are dependent on add-ons and third-party integration



Value Index

N/A

The vendor declined to provide pricing, and publicly available pricing could not be found

Product					Vendor				
Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel

Infor Epiphany's Social Media Features

Sales	Marketing	Customer Service
 Integration with social media sites for account information * Only available as an add-on ** Available through partnership with Salesforce Radian 6 *** Facebook only	 Social property management* Social listening** Social analytics***	 In-band response to social channels

■ Included features
■ Features unavailable / available via add-on

Features

Account Mgmt.	Call Center	Collab.	Service	Event Mgmt.	Knowledge Mgmt.	Marketing	Reporting & Analytics	Sales	E-commerce	Workflow mgmt.

Info-Tech Recommends:

If you choose Infor for its marketing capabilities, beware that you may have to supplement some of the social features with Marketing Cloud integration and other add-ons available from Infor. Also, organizations with high collaboration needs may need to stay away from Infor Epiphany altogether.

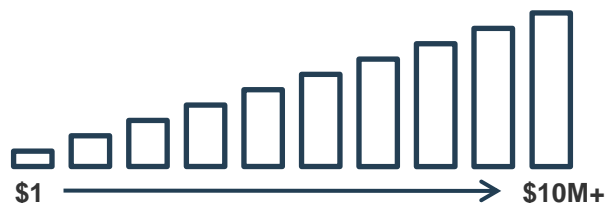
Onyx offers an adequate feature set, but has fallen behind other competitors

Emerging Player

Product: Onyx CRM
Employees: 1,500
Headquarters: Atlanta, GA
Website: Aptean.com
Founded: 2012
Presence: Private



The vendor declined to provide pricing, and publicly available pricing could not be found



Overview

- Aptean was formed by the merger of CDC Software and Consona Corporation in August 2012, creating a global organization with a broad range of product offerings. Prior to the formation of Aptean, Onyx entered the CRM market in the late 1990s and was acquired by Consona in 2006.

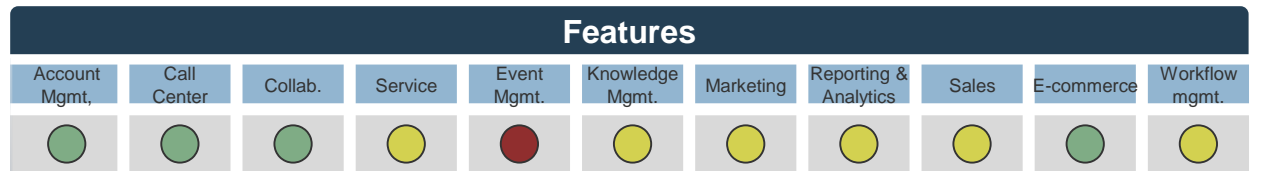
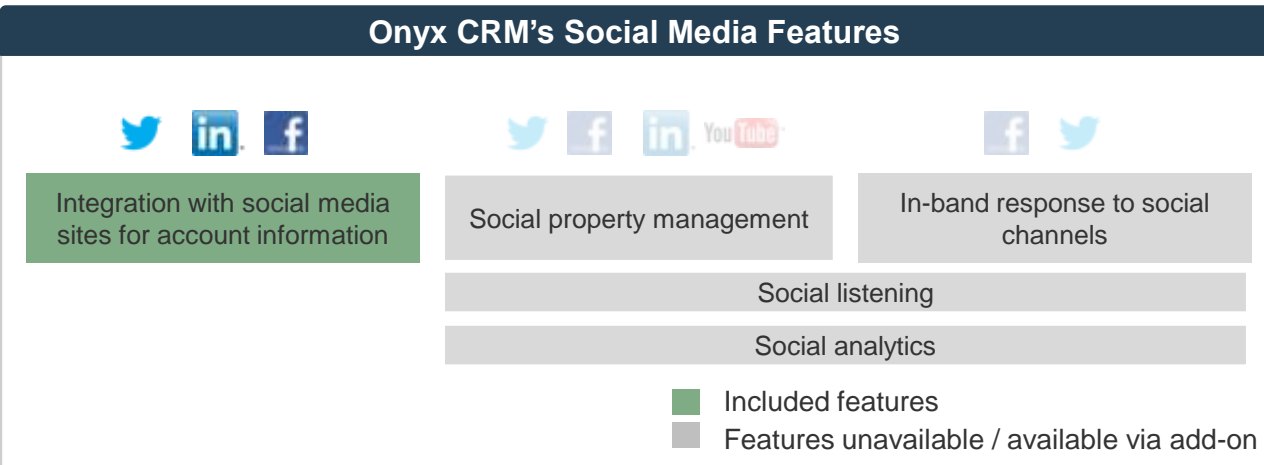
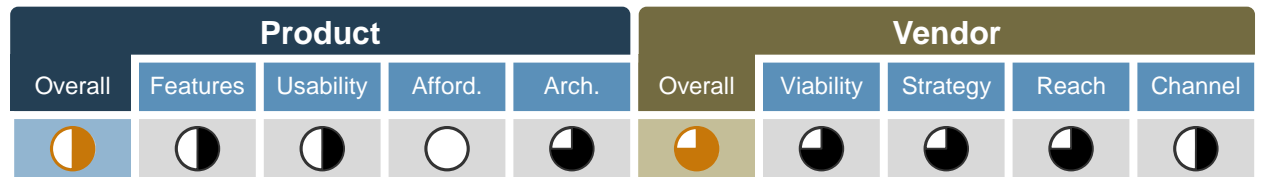
Strengths

- The standalone e-commerce portal allows for customized quotes and proposals for sales opportunities. Customers can track quote history, including support for different currencies.
- Historically, Onyx has excelled at case management and multi-channel support. Sophisticated prioritization and routing allow assigning of requests based on request volumes, skill sets, and other factors. Today, the lack of social features for customer service is undermining this otherwise strong feature set.

Challenges

- Mobile features are limited compared to some other players in the space, and include web-based BlackBerry and iPhone support. A native app for iPhone is available as well.
- Some features, such as analytics and workflows, are middle of the road compared to competitors. Although sales management features include integration with social media, they overwhelm on pipeline management and lack of sales compensation management.
- No event management functionality is available out-of-the-box.

Onyx CRM is missing important functionality, and requires new investment to catch up with some competitors



Info-Tech Recommends:

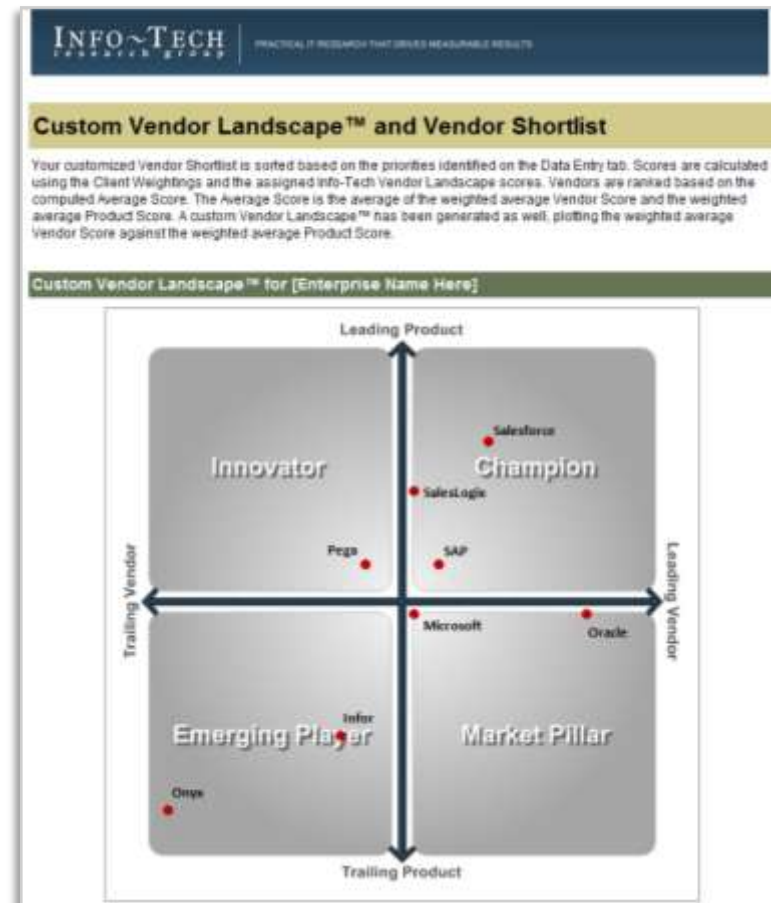
Although Aptean's verbal commitment to Onyx CRM has been strong, Info-Tech is waiting to see future developments. In the meantime, Info-Tech cautions clients on choosing the Onyx product without clear signs of renewed product focus and investment.

Identify leading candidates with the *Large Enterprise CRM Suites Vendor Shortlist Tool*

Generate a customized shortlist of vendors based on *your* key priorities using Info-Tech's [Large Enterprise CRM Suites Vendor Shortlist Tool](#).













This tool offers the ability to modify:

- Overall Vendor vs. Product Weightings
- Individual product criteria weightings:
 - ✓ Features
 - ✓ Usability
 - ✓ Affordability
 - ✓ Architecture
- Individual vendor criteria weightings:
 - ✓ Viability
 - ✓ Strategy
 - ✓ Reach
 - ✓ Channel













Appendix A: Added benefits of Marketing Cloud for Salesforce.com (Slide 1 of 2)

With the addition of Marketing Cloud to the Salesforce.com product portfolio, deciding which products your organization needs can become increasingly complex. Use this table as a guide to choosing the best product mix.

Feature	Sales Cloud & Service Cloud (Enterprise Edition)* \$125/user/month (Sales Cloud) \$135/user/month (Service Cloud)		Marketing Cloud (Corporate Edition) \$20,000/company/month	
Account Management		Comprehensive customer records are included; Field service management is offered for an additional fee with Service Cloud license.		
Call Center Management		Multiple CTI partnerships. Cloud CTI integration is available since Summer 2012. Call queuing and call scripting are available as well.		Customer's social information can be triggered to be automatically captured on the screen when a call comes in.
Collaboration		Includes case collaboration through Chatter, live chat, collaboration feeds, file sharing, integration with SharePoint, and partner portals. Customer-to-customer collaboration is available for an additional fee with Chatter Communities.		
Customer Service		Most of the advanced service features are available through the Service Cloud license. They include an embedded live agent, Service Cloud Console (add-on), inbound response for Facebook and Twitter, and a self-serve portal (an add-on license). Online video chat will be included into Sales Cloud and Service Cloud in 2013.		Ability to create support cases based on activities in the social cloud.
Event Management		The products include an event management module (free add-on via App Exchange). Unfortunately, it can't be integrated out of the box with marketing modules.		
Knowledge Management		A KC5-certified Knowledge Base and a self-server portal are included with the Service Cloud license. Vivid email template and advanced search are also available. Knowledge article auto-suggestions as well as video recordings for knowledge articles are also available.		

*Info-Tech recommends providing Sales Cloud licenses to Sales and Marketing personnel and Service Cloud licenses to Customer Service personnel.

Appendix A: Added benefits of Marketing Cloud for Salesforce.com (Slide 2 of 2)

Feature	Sales Cloud & Service Cloud (Enterprise Edition)* \$125/user/month (Sales Cloud) \$135/user/month (Service Cloud)		Marketing Cloud (Corporate Edition) \$20,000/company/month
Marketing Management		Email campaigns and lead management tools are included; campaign tracking and automating lead scoring and routing are also available. Social key for social-to-lead is on the roadmap for 2013. The social key can be hit to bring back social leads from LinkedIn, Facebook, Twitter, and YouTube.	 Creation and deployment of social content using 50+ social applications (e.g. contests, video, photo galleries). Social analytics and sentiment analysis. Social listening capabilities.
Reporting and Analytics		Real-time dashboards, custom drag-and-drop reports, and enterprise analytics are available, including automatic forecast rollup for teams. For service, reports allow you to track progress against service milestones and metrics with the Contracts and Entitlements feature.	 Ability to track social campaign ROI and content performance (website traffic, signups, downloads, etc.).
Sales Management		Opportunity tracking and agent-facing quotes allow you to set up revenue and quantity schedules to mirror payment and delivery terms. Social accounts and contacts are included for a 360-degree view of the customer. Geolocation features and API for traveling salespeople are included starting in Winter 2013. If required, performance management tools are available through Work.com.	 Marketing Cloud allows you to set up specific rules for creating opportunities based on activities in the social cloud.
Sell-side E-commerce		Includes real time quotes engine and product tracking, but this is not a real strength compared to competitors.	
Workflow Management		Approvals and workflows include sales process automation, visual workflows with drag and drop simplicity (patterns can be copied and pasted), and sophisticated approval automation for virtually any process including discount requests and opportunity close approvals.	 Online engagement workflow management is available for full engagement and outreach tracking.

*Info-Tech recommends providing Sales Cloud licenses to Sales and Marketing personnel and Service Cloud licenses to Customer Service personnel.

Appendix B

1. Vendor Landscape Methodology: Overview
2. Vendor Landscape Methodology: Product Selection & Information Gathering
3. Vendor Landscape Methodology: Scoring
4. Vendor Landscape Methodology: Information Presentation
5. Vendor Landscape Methodology: Fact Check & Publication
6. Product Pricing Scenario

Vendor Landscape Methodology: Overview

Info-Tech's Vendor Landscapes are research materials that review a particular IT market space, evaluating the strengths and abilities of both the products available in that space, as well as the vendors of those products. These materials are created by a team of dedicated analysts operating under the direction of a senior subject matter expert over a period of six weeks.

Evaluations weigh selected vendors and their products (collectively "solutions") on the following eight criteria to determine overall standing:

- **Features:** The presence of advanced and market-differentiating capabilities.
- **Usability:** The intuitiveness, power, and integrated nature of administrative consoles and client software components.
- **Affordability:** The three-year total cost of ownership of the solution.
- **Architecture:** The degree of integration with the vendor's other tools, flexibility of deployment, and breadth of platform applicability.
- **Viability:** The stability of the company as measured by its history in the market, the size of its client base, and its financial performance.
- **Strategy:** The commitment to both the market-space, as well as to the various sized clients (small, mid-sized, and enterprise clients).
- **Reach:** The ability of the vendor to support its products on a global scale.
- **Channel:** The measure of the size of the vendor's channel partner program, as well as any channel strengthening strategies.

Evaluated solutions are plotted on a standard two by two matrix:

- **Champions:** Both the product and the vendor receive scores that are above the average score for the evaluated group.
- **Innovators:** The product receives a score that is above the average score for the evaluated group, but the vendor receives a score that is below the average score for the evaluated group.
- **Market Pillars:** The product receives a score that is below the average score for the evaluated group, but the vendor receives a score that is above the average score for the evaluated group.
- **Emerging Players:** Both the product and the vendor receive scores that are below the average score for the evaluated group.

Info-Tech's Vendor Landscapes are researched and produced according to a strictly adhered to process that includes the following steps:

- Vendor/product selection
- Information gathering
- Vendor/product scoring
- Information presentation
- Fact checking
- Publication

This document outlines how each of these steps is conducted.

Vendor Landscape Methodology: Vendor/Product Selection & Information Gathering

Info-Tech works closely with its client base to solicit guidance in terms of understanding the vendors with whom clients wish to work and the products that they wish evaluated; this demand pool forms the basis of the vendor selection process for Vendor Landscapes. Balancing this demand, Info-Tech also relies upon the deep subject matter expertise and market awareness of its Senior and Lead Research Analysts to ensure that appropriate solutions are included in the evaluation. As an aspect of that expertise and awareness, Info-Tech's analysts may, at their discretion, determine the specific capabilities that are required of the products under evaluation, and include in the Vendor Landscape only those solutions that meet all specified requirements.

Information on vendors and products is gathered in a number of ways via a number of channels.

Initially, a request package is submitted to vendors to solicit information on a broad range of topics. The request package includes:

- A detailed survey.
- A pricing scenario (see Vendor Landscape Methodology: Price Evaluation and Pricing Scenario, below).
- A request for reference clients.
- A request for a briefing and, where applicable, guided product demonstration.

These request packages are distributed approximately twelve weeks prior to the initiation of the actual research project to allow vendors ample time to consolidate the required information and schedule appropriate resources.

During the course of the research project, briefings and demonstrations are scheduled (generally for one hour each session, though more time is scheduled as required) to allow the analyst team to discuss the information provided in the survey, validate vendor claims, and gain direct exposure to the evaluated products. Additionally, an end-user survey is circulated to Info-Tech's client base and vendor-supplied reference accounts are interviewed to solicit their feedback on their experiences with the evaluated solutions and with the vendors of those solutions.

These materials are supplemented by a thorough review of all product briefs, technical manuals, and publicly available marketing materials about the product, as well as about the vendor itself.

Refusal by a vendor to supply completed surveys or submit to participation in briefings and demonstrations does not eliminate a vendor from inclusion in the evaluation. Where analyst and client input has determined that a vendor belongs in a particular evaluation, it will be evaluated as best as possible based on publicly available materials only. As these materials are not as comprehensive as a survey, briefing, and demonstration, the possibility exists that the evaluation may not be as thorough or accurate. Since Info-Tech includes vendors regardless of vendor participation, it is always in the vendor's best interest to participate fully.

All information is recorded and catalogued, as required, to facilitate scoring and for future reference.

Vendor Landscape Methodology: Scoring

Once all information has been gathered and evaluated for all vendors and products, the analyst team moves to scoring. All scoring is performed at the same time so as to ensure as much consistency as possible. Each criterion is scored on a ten point scale, though the manner of scoring for criteria differs slightly:

- Features is scored via **Cumulative Scoring**
- Affordability is scored via **Scalar Scoring**
- All other criteria are scored via **Base5 Scoring**

In Cumulative Scoring, a single point is assigned to each evaluated feature that is regarded as being fully present, a half point to each feature that is partially present or pending in an upcoming release, and zero points to features that are deemed to be absent. The assigned points are summed and normalized to a value out of ten. For example, if a particular Vendor Landscape evaluates eight specific features in the Feature Criteria, the summed score out of eight for each evaluated product would be multiplied by 1.25 to yield a value out of ten.

In Scalar Scoring, a score of ten is assigned to the lowest cost solution, and a score of one is assigned to the highest cost solution. All other solutions are assigned a mathematically determined score based on their proximity to / distance from these two endpoints. For example, in an evaluation of three solutions, where the middle cost solution is closer to the low end of the pricing scale it will receive a higher score, and where it is closer to the high end of the pricing scale it will receive a lower score; depending on proximity to the high or low price it is entirely possible that it could receive either ten points (if it is very close to the lowest price) or one point (if it is very close to the highest price). Where pricing cannot be determined (vendor does not supply price and public sources do not exist), a score of 0 is automatically assigned.

In Base5 scoring a number of sub-criteria are specified for each criterion (for example, Longevity, Market Presence, and Financials are sub-criteria of the Viability criterion), and each one is scored on the following scale:

- 5 - The product/vendor is exemplary in this area (nothing could be done to improve the status).
- 4 - The product/vendor is good in this area (small changes could be made that would move things to the next level).
- 3 - The product/vendor is adequate in this area (small changes would make it good, more significant changes required to be exemplary).
- 2 - The product/vendor is poor in this area (this is a notable weakness and significant work is required).
- 1 - The product/vendor is terrible/fails in this area (this is a glaring oversight and a serious impediment to adoption).

The assigned points are summed and normalized to a value out of ten as explained in Cumulative Scoring above.

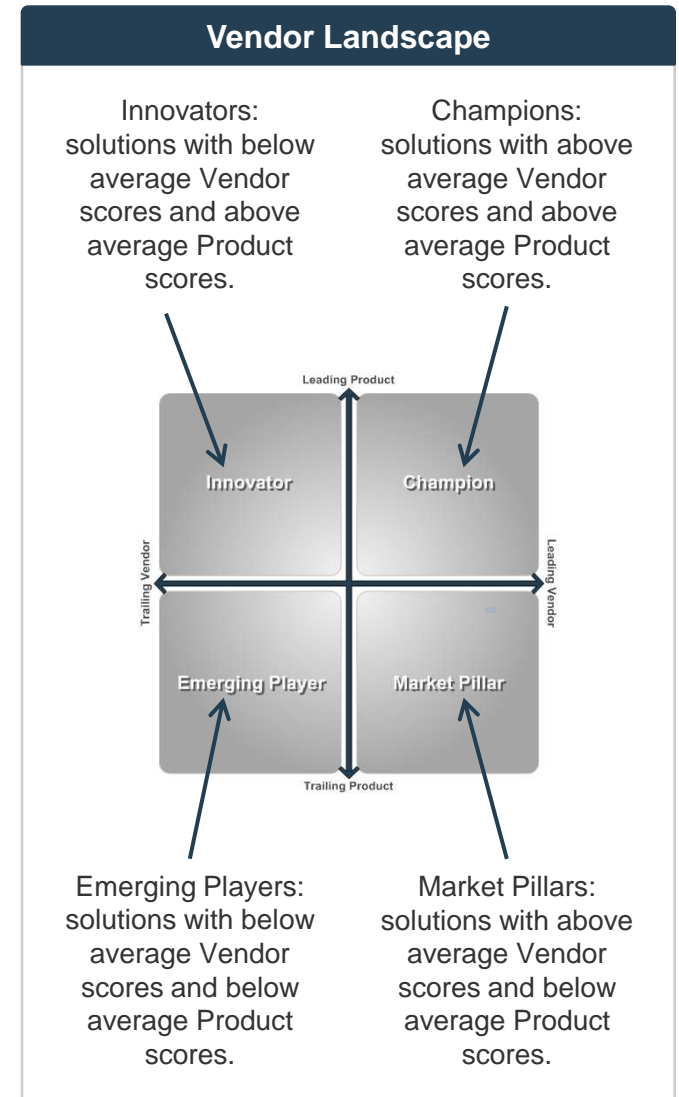
Scores out of ten, known as Raw scores, are transposed as-is into Info-Tech's Vendor Landscape Shortlist Tool, which automatically determines Vendor Landscape positioning (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, below), Criteria Score (see Vendor Landscape Methodology: Information Presentation - Criteria Score, below), and Value Index (see Vendor Landscape Methodology: Information Presentation - Value Index, below).

Vendor Landscape Methodology: Information Presentation – Vendor Landscape

Info-Tech's Vendor Landscape is a two-by-two matrix that plots solutions based on the combination of Product score and Vendor score. Placement is not determined by absolute score, but instead by relative score. Relative scores are used to ensure a consistent view of information and to minimize dispersion in nascent markets, while enhancing dispersion in commodity markets to allow for quick visual analysis by clients.

Relative scores are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion Raw score is multiplied by the pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process to eliminate any possibility of bias. Weighting factors are expressed as a percentage such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100% and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.
4. Overall Vendor scores are then normalized to a 20 point scale by calculating the arithmetic mean and standard deviation of the pool of Vendor scores. Vendors for whom their overall Vendor score is higher than the arithmetic mean will receive a normalized Vendor score of 11-20 (exact value determined by how much higher than the arithmetic mean their overall Vendor score is), while vendors for whom their overall Vendor score is lower than the arithmetic mean will receive a normalized Vendor score of between one and ten (exact value determined by how much lower than the arithmetic mean their overall Vendor score is).
5. Overall Product score is normalized to a 20 point scale according to the same process.
6. Normalized scores are plotted on the matrix, with Vendor score being used as the x-axis, and Product score being used as the y-axis.

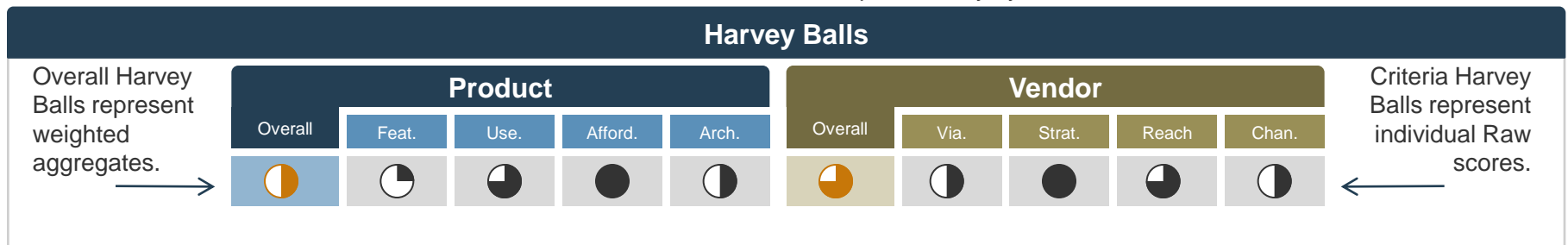


Vendor Landscape Methodology: Information Presentation – Criteria Scores (Harvey Balls)

Info-Tech's Criteria Scores are visual representations of the absolute score assigned to each individual criterion, as well as of the calculated overall Vendor and Product scores. The visual representation used is Harvey Balls.

Harvey Balls are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion Raw score is multiplied by a pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process, based on the expertise of the Senior or Lead Research Analyst, to eliminate any possibility of bias. Weighting factors are expressed as a percentage, such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100%, and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.
4. Both overall Vendor score / overall Product score, as well as individual criterion Raw scores are converted from a scale of one to ten to Harvey Ball scores on a scale of zero to four, where exceptional performance results in a score of four and poor performance results in a score of zero.
5. Harvey Ball scores are converted to Harvey Balls as follows:
 - A score of four becomes a full Harvey Ball.
 - A score of three becomes a three-quarter full Harvey Ball.
 - A score of two becomes a half full Harvey Ball.
 - A score of one becomes a one-quarter full Harvey Ball.
 - A score of zero (zero) becomes an empty Harvey Ball.
6. Harvey Balls are plotted by solution in a chart where rows represent individual solutions and columns represent overall Vendor / overall Product, as well as individual criteria. Solutions are ordered in the chart alphabetically by vendor name.



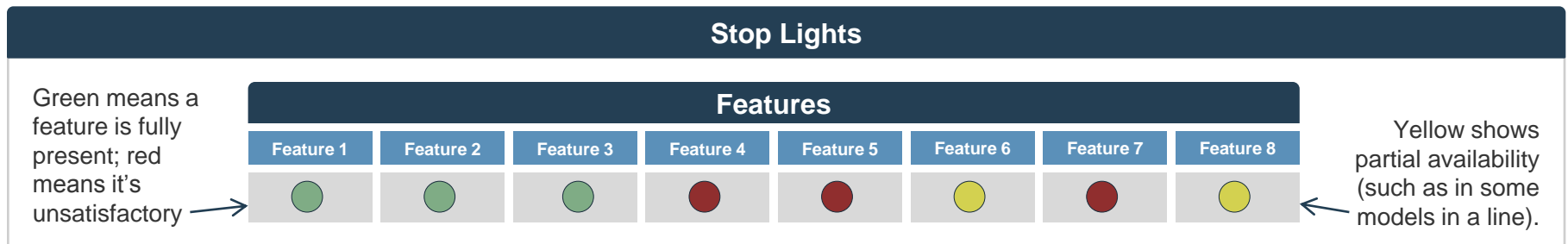
Vendor Landscape Methodology: Information Presentation – Feature Ranks (Stop Lights)

Info-Tech's Feature Ranks are visual representations of the presence/availability of individual features that collectively comprise the Features' criterion. The visual representation used is Stop Lights.

Stop Lights are determined as follows:

1. A single point is assigned to each evaluated feature category that contains an impressive array of advanced characteristics and does not lack any important basics. Partial points are assigned to each feature bucket that is missing important characteristics (either basic or advanced) or they are pending in an upcoming release. Zero points is assigned if all features, basic and advanced, are missing.
 - Fully present means all aspects and capabilities of the feature as described are in evidence.
 - Unsatisfactory means that some basics, as well as most of the advanced characteristics are missing.
 - Partially present means some, but not all, aspects and capabilities of the feature as described are in evidence, **OR** all aspects and capabilities of the feature as described are in evidence, but only for some models in a line.
 - Pending means all aspects and capabilities of the feature, as described, are anticipated to be in evidence in a future revision of the product and that revision is to be released within the next 12 months.
2. Feature scores are converted to Stop Lights as follows:
 - >0.7 becomes a Green light.
 - 0.4 - 0.6 becomes a Yellow light.
 - <0.3 becomes a Red light.
3. Stop Lights are plotted by solution in a chart where rows represent individual solutions and columns represent individual features. Solutions are ordered in the chart alphabetically by vendor name.

For example, a set of applications is being reviewed and a feature of “*Integration with Mobile Devices*” that is defined as “*availability of dedicated mobile device applications for iOS, Android, and BlackBerry devices*” is specified. Solution A provides such apps for all listed platforms and scores “Green”, solution B provides apps for iOS and Android only and scores “Yellow”, while solution C provides mobile device functionality through browser extensions, has no dedicated apps, and so scores “Red”.



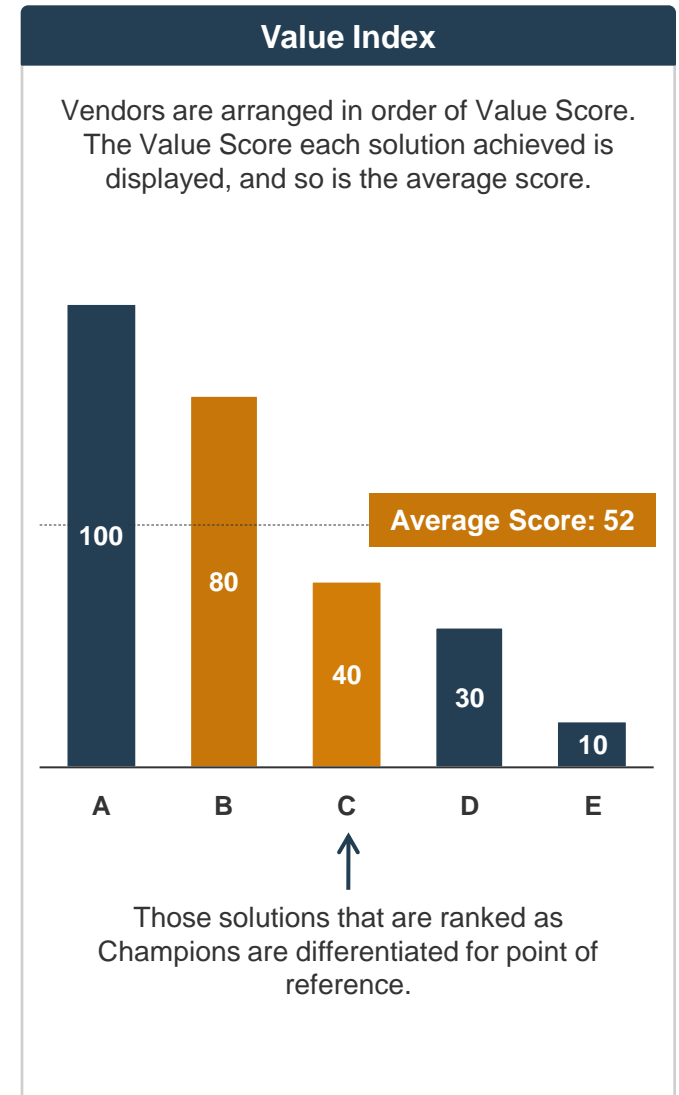
Vendor Landscape Methodology: Information Presentation – Value Index

Info-Tech's Value Index is an indexed ranking of solution value per dollar as determined by the Raw scores assigned to each criteria (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

Value scores are calculated as follows:

1. The Affordability criterion is removed from the overall Product score and the remaining Product score criteria (Features, Usability, Architecture) are reweighted so as to retain the same weightings relative to one another, while still summing to 100%. For example, if all four Product criteria were assigned base weightings of 25%, for the determination of the Value score, Features, Usability, and Architecture would be reweighted to 33.3% each to retain the same relative weightings while still summing to 100%.
2. A sum-product of the weighted Vendor criteria scores and of the reweighted Product criteria scores is calculated to yield an overall Vendor score and a reweighted overall Product score.
3. The overall Vendor score and the reweighted overall Product score are then summed, and this sum is multiplied by the Affordability Raw score to yield an interim Value score for each solution.
4. All interim Value scores are then indexed to the highest performing solution by dividing each interim Value score by the highest interim Value score. This results in a Value score of 100 for the top solution and an indexed Value score relative to the 100 for each alternate solution.
5. Solutions are plotted according to Value score, with the highest score plotted first, and all remaining scores plotted in descending numerical order.

Where pricing is not provided by the vendor and public sources of information cannot be found, an Affordability Raw score of zero is assigned. Since multiplication by zero results in a product of zero, those solutions for which pricing cannot be determined receive a Value score of zero. Since Info-Tech assigns a score of zero where pricing is not available, it is always in the vendor's best interest to provide accurate and up to date pricing



Vendor Landscape Methodology: Information Presentation – Price Evaluation

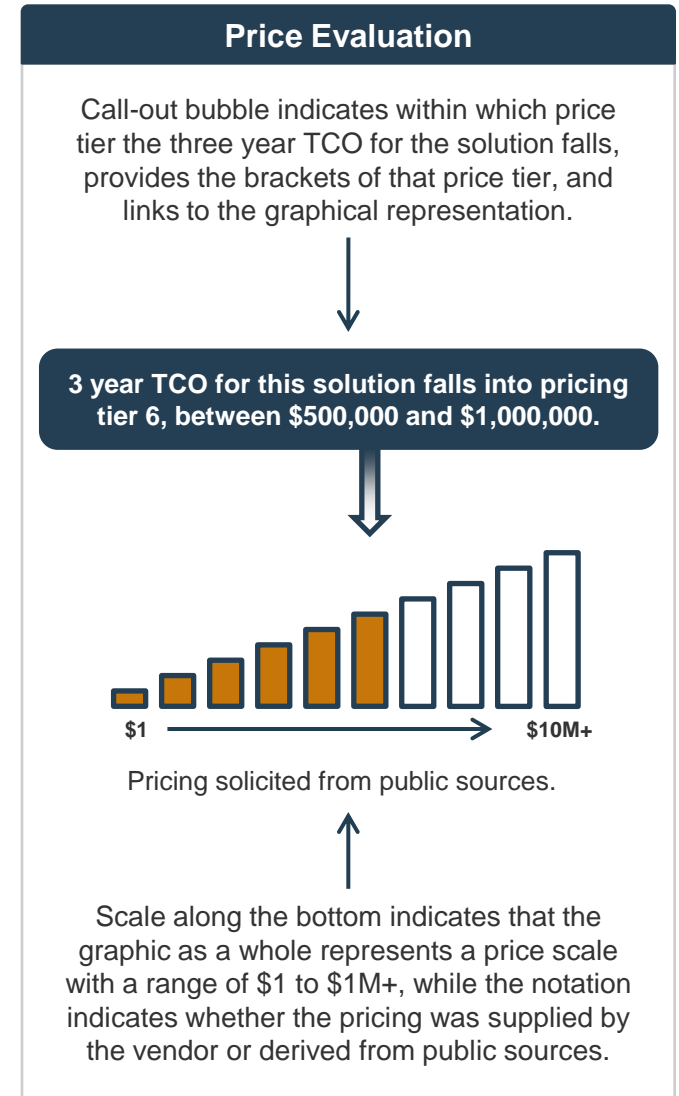
Info-Tech's Price Evaluation is a tiered representation of the three year Total Cost of Ownership (TCO) of a proposed solution. Info-Tech uses this method of communicating pricing information to provide high-level budgetary guidance to its end-user clients while respecting the privacy of the vendors with whom it works. The solution TCO is calculated and then represented as belonging to one of ten pricing tiers.

Pricing tiers are as follows:

1. Between \$1 and \$25,000
2. Between \$25,000 and \$50,000
3. Between \$50,000 and \$100,000
4. Between \$100,000 and \$250,000
5. Between \$250,000 and \$500,000
6. Between \$500,000 and \$1,000,000
7. Between \$1,000,000 and \$2,500,000
8. Between \$2,500,000 and \$5,000,000
9. Between \$5,000,000 and \$10,000,000
10. Greater than \$10,000,000

Where pricing is not provided, Info-Tech makes use of publicly available sources of information to determine a price. As these sources are not official price lists, the possibility exists that they may be inaccurate or outdated, and so the source of the pricing information is provided. Since Info-Tech publishes pricing information regardless of vendor participation, it is always in the vendor's best interest to supply accurate and up to date information.

Info-Tech's Price Evaluations are based on pre-defined pricing scenarios (see Product Pricing Scenario, below) to ensure a comparison that is as close as possible between evaluated solutions. Pricing scenarios describe a sample business and solicit guidance as to the appropriate product/service mix required to deliver the specified functionality, the list price for those tools/services, as well as three full years of maintenance and support.



Vendor Landscape Methodology: Information Presentation – Scenarios

Info-Tech's Scenarios highlight specific use cases for the evaluated solution to provide as complete (when taken in conjunction with the individual written review, Vendor Landscape, Criteria Scores, Feature Ranks, and Value Index) a basis for comparison by end-user clients as possible.

Scenarios are designed to reflect tiered capability in a particular set of circumstances. Determination of the Scenarios in question is at the discretion of the analyst team assigned to the research project. Where possible, Scenarios are designed to be mutually exclusive and collectively exhaustive, or at the very least, hierarchical such that the tiers within the Scenario represent a progressively greater or broader capability.

Scenario ranking is determined as follows:

1. The analyst team determines an appropriate use case.
For example:
 - Clients that have multinational presence and require vendors to provide four hour onsite support.
2. The analyst team establishes the various tiers of capability.
For example:
 - Presence in Americas
 - Presence in EMEA
 - Presence in APAC
3. The analyst team reviews all evaluated solutions and determines which ones meet which tiers of capability.
For example:
 - Presence in Americas – Vendor A, Vendor C, Vendor E
 - Presence in EMEA – Vendor A, Vendor B, Vendor C
 - Presence in APAC – Vendor B, Vendor D, Vendor E
4. Solutions are plotted on a grid alphabetically by vendor by tier. Where one vendor is deemed to be stronger in a tier than other vendors in the same tier, they may be plotted non-alphabetically.
For example:
 - Vendor C is able to provide four hour onsite support to 12 countries in EMEA while Vendors A and B are only able to provide four hour onsite support to eight countries in EMEA; Vendor C would be plotted first, followed by Vendor A, then Vendor B.

Vendor Landscape Methodology: Information Presentation – Vendor Awards

At the conclusion of all analyses, Info-Tech presents awards to exceptional solutions in three distinct categories. Award presentation is discretionary; not all awards are extended subsequent to each Vendor landscape and it is entirely possible, though unlikely, that no awards may be presented.

Awards categories are as follows:

- **Champion Awards** are presented to those solutions, and only those solutions, that land in the Champion zone of the Info-Tech Vendor Landscape (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, above). If no solutions land in the Champion zone, no Champion Awards are presented. Similarly, if multiple solutions land in the Champion zone, multiple Champion Awards are presented.
- **Trend Setter Awards** are presented to those solutions, and only those solutions, that are deemed to include the most original/inventive product/service, or the most original/inventive feature/capability of a product/service. If no solution is deemed to be markedly or sufficiently original/inventive, either as a product/service on the whole or by feature/capability specifically, no Trend Setter Award is presented. Only one Trend Setter Award is available for each Vendor Landscape.
- **Best Overall Value Awards** are presented to those solutions, and only those solutions, that are ranked highest on the Info-Tech Value Index (see Vendor Landscape Methodology: Information Presentation – Value Index, above). If insufficient pricing information is made available for the evaluated solutions, such that a Value Index cannot be calculated, no Best Overall Value Award will be presented. Only one Best Overall Value Award is available for each Vendor Landscape.

Vendor Awards



Info-Tech's **Champion Award** is presented to solutions in the Champion zone of the Vendor Landscape.



Info-Tech's **Trend Setter Award** is presented to the most original/inventive solution evaluated.



Info-Tech's **Best Overall Value Award** is presented to the solution with the highest Value Index score.

Vendor Landscape Methodology: Fact Check & Publication

Info-Tech takes the factual accuracy of its Vendor Landscapes, and indeed of all of its published content, very seriously. To ensure the utmost accuracy in its Vendor Landscapes, we invite all vendors of evaluated solutions (whether the vendor elected to provide a survey and/or participate in a briefing or not) to participate in a process of Fact Check.

Once the research project is complete and the materials are deemed to be in a publication ready state, excerpts of the material specific to each vendor's solution are provided to the vendor. Info-Tech only provides material specific to the individual vendor's solution for review encompassing the following:

- All written review materials of the vendor and the vendor's product that comprise the evaluated solution.
- Info-Tech's Criteria Scores / Harvey Balls detailing the individual and overall Vendor / Product scores assigned.
- Info-Tech's Feature Rank / Stop Lights detailing the individual feature scores of the evaluated product.
- Info-Tech's Value Index ranking for the evaluated solution.
- Info-Tech's Scenario ranking for all considered scenarios for the evaluated solution.

Info-Tech does not provide the following:

- Info-Tech's Vendor Landscape placement of the evaluated solution.
- Info-Tech's Value Score for the evaluated solution.
- End-user feedback gathered during the research project.
- Info-Tech's overall recommendation in regard to the evaluated solution.

Info-Tech provides a one-week window for each vendor to provide written feedback. Feedback must be corroborated (be provided with supporting evidence), and where it does, feedback that addresses factual errors or omissions is adopted fully, while feedback that addresses opinions is taken under consideration. The assigned analyst team makes all appropriate edits and supplies an edited copy of the materials to the vendor within one week for final review.

Should a vendor still have concerns or objections at that time, they are invited to a conversation, initially via email, but as required and deemed appropriate by Info-Tech, subsequently via telephone, to ensure common understanding of the concerns. Where concerns relate to ongoing factual errors or omissions they are corrected under the supervision of Info-Tech's Vendor Relations personnel. Where concerns relate to ongoing differences of opinion they are again taken under consideration with neither explicit nor implicit indication of adoption.

Publication of materials is scheduled to occur within the six weeks immediately following the completion of the research project, but does not occur until the Fact Check process has come to conclusion, and under no circumstances are "pre-publication" copies of any materials made available to any client.

Product Pricing Scenario

- Info-Tech Research Group provided each vendor with a common pricing scenario to enable normalized scoring of Affordability, calculation of Value Index rankings, and identification of the appropriate solution pricing tier as displayed on each vendor scorecard.

Pricing Scenario:

Mushu Dynamics is a global provider of specialized consumer electronics. The firm provides 24/7 customer support via self-service portals and assisted-service channels (telephony, email, and chat). Mushu Dynamics has a total of five call centers in North America and Europe. The organization has a CSM solution in place, but is looking to adopt a comprehensive CRM suite that would allow for a 360 degree view of the customer across sales, marketing, and customer service.

- Enterprise Name: Mushu Dynamics
- Enterprise Size: Large Enterprise
- Enterprise Vertical: Consumer Electronics
- Total Number of Sites: 5 call centers globally
- Total Number of End Users:
 - 1,000 sales agents. 50 sales managers
 - 300 customer service agents. 20 customer service managers (5 per shift)
 - 100 users in Marketing
- Operating System Environment: Windows 7
- Office Productivity Suite Environment: Office 2010 Enterprise Edition

Product Pricing Scenario, continued

The organization needs a solution that provides the following functionality:

- Account management: comprehensive customer records with demographic information, transaction history, and billing information. Ability to add user-defined fields.
- Reporting and analytics (i.e. user-configurable dashboards for basic metrics). Please specify if an external reporting vendor is necessary.
- Social functionality (ability to pull information from social channels into customer contact records; basic monitoring and response capabilities).
- Integration with other relevant technologies: CSM, call center telephony/IVR etc.
- Access to suite over mobile-optimized HTML. Access to suite via HTML5 or dedicated mobile applications (iOS, Android, BB) is highly desirable.
- Sales management features: lead generation and pipeline management, team-based and geography-based assignment.
- Marketing management features: marketing campaign management and tracking; email campaigns with lead targeting.