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## CRM Roundup

Monday, February 5th 2007

Here is the fourth edition of our [Weekly Office 2.0 Roundup](#). Today, we will review 9 CRM applications, from Free CRM to Zoho CRM. We will identify some unique features that might help your own selection process—if you're not already set, and you will get a chance to cast your vote for the best CRM application.

With the help of many [contributors](#), we completed the [CRM](#) section of the [Office 2.0 Database](#). From the 9 players we identified, 5 the top 5 can be considered as enterprise solutions, while the next 4 are significantly more limited in terms of functionality. All 9 applications are actively developed and supported by legitimate companies.

### **Functionality**

From a functionality standpoint, most CRM applications revolve around a common set of business objects such as Contact, Account, Lead, Activity, Opportunity, Product, or Quote. They are usually developed on top of a relational database management system, and provide basic reporting capabilities. The more advanced solutions add case management, document management, and project management modules, as well as full fledge ERP functionality in the case of [Netsuite](#) and [Salesboom](#). All the applications we reviewed support data sharing across team members, as well as data import and export, but only a handful provides support for publishing and syndication. All top 5 solutions provide a complete API for integration with external systems.

### **Ease of Migration**

Migration from an email client such as Microsoft Outlook to a CRM system is fairly easy, and can be done by exporting contacts and events into CSV files, then importing them back into the CRM system. Nevertheless, relationships between contacts and events are usually lost in the process, unless your CRM application supports advanced integration with Microsoft Outlook, as is the case for [Salesforce.com](#) for example. Migration from one CRM system to another is a lot more complex, for their respective data models usually do not match. In such a case, the professional services offered by the CRM vendor will usually be required, and migration will take anywhere from one day to a week. One thing to keep in mind when planning such a migration is that some CRM vendors will not allow you to export your entire datasets with all relationships between objects. Some other vendors will allow you to do it only once, giving you only one shot at it.

### **Price**

All the applications we reviewed provide free evaluation, but none of the top 5 applications offer a free version, unless you install them on premise, as can be the case with [SugarCRM](#) and [vtiger](#). Price per user and per month varies from \$5.95 to \$125, and possibly more if we include [NetSuite](#) for which pricing is not publicly disclosed. Of all the services you might want to use for building your Office 2.0 setup, CRM will certainly be the most expensive, but it can be worth every penny you spend for it if you use it to the full extent of its capabilities.

### Alternatives

If you are planning to use a CRM system for automating your sales process, not very many alternatives are worth considering. But if you only have a need for contact management and advanced calendaring, a good [contact manager](#) such as [Big Contacts](#) might be plenty enough. Nevertheless, the strength of a CRM system comes in the integration of multiple business objects such as Account, Lead, and Opportunity, and the ability to create new business objects. From this viewpoint, a modern CRM system is akin to a powerful relational database management system extended with easy-to-use configuration and development tools that non-technical users can leverage for building complete applications, and [online databases](#) currently available have not yet reached a level of maturity that would make them suitable alternatives, even though this might happen toward the later end of this year.

### Top Players

Several CRM applications do make use of HTTPS, therefore the [Alexa](#) ranking is not as reliable as we would like it to be. Nevertheless, and according to this ranking, we can extrapolate a list of top players in the space, which is somehow corroborated by their respective Google PageRanks.

- 1. [Salesforce.com](#) [Alexa Rank: 1,534 Google PageRank: 8]
- 2. [NetSuite](#) [Alexa Rank: 6,881 Google PageRank: 7]
- 3. [SugarCRM](#) [Alexa Rank: 7,034 Google PageRank: 7]
- 4. [Zoho CRM](#) [Alexa Rank: 9,039 Google PageRank: 6]
- 5. [vtiger](#) [Alexa Rank: 16,510 Google PageRank: 5]
- 6. [Salesboom](#) [Alexa Rank: 83,554 Google PageRank: 5]
- 7. [Free CRM](#) [Alexa Rank: 103,250 Google PageRank: 6]
- 8. [Relenta CRM](#) [Alexa Rank: 157,784 Google PageRank: 5]
- 9. [Solve360](#) [Alexa Rank: 735,130 Google PageRank: 5]

### Quick Reviews

There are only 9 applications in our [database](#), so all of them got a review.

**Free CRM:** If you can cope with advertisement banners and no SSL encryption, [Free CRM](#) is a pretty good solution for small groups. It provides all standard CRM objects, plus case management and document management. The [user interface](#) is not the most sexy out there, but \$14.95 per user per month remove the advertisement banners and gives you SSL encryption.

**NetSuite:** This CRM package offered by [NetSuite](#) is one of the most advanced out there, and includes order management, incentive management, partner management, project tracking, advanced analytics, and a complete customer portal. Furthermore, it is tightly integrated with [NetERP](#) and [NetCommerce](#), making it a good option for small business looking for an all-in-one solution. Unfortunately, the application is fairly expensive (pricing not publicly available), and does not provide an ecosystem of partners and solution providers as rich as the one developed by [Salesforce.com](#).

**Relenta CRM:** This little application is less about salesforce automation, and more about group productivity, with a strong influence from David Allen's Getting Things Done ([GTD](#)) methodology. Nevertheless, it's very well thought out, quite affordable, and might be less intimidating to less sophisticated users who could be scared by the flury of tabs and buttons usually displayed by the more advanced CRM applications out there. Definitely

worth considering as an upgrade to [Big Contacts](#).

[Salesboom](#): This application is similar to [NetSuite](#) in the sense that it also provides ERP capabilities. With 23,000 subscribers, 3000 customers in over 148 countries around the world, it's definitely one of the most active players in the field, even though it does not have anywhere near the mindshare of a [Salesforce.com](#). Among the most advanced features offered by [Salesboom](#) are CTI, IVR, and VOIP support for contact centers, advanced workflow and process automation, mail merge into Microsoft Word and Microsoft Excel, and EDI services. Pricing goes from \$18 to \$75 per user per month, making it a lot less expensive than [NetSuite](#) or [Salesforce.com](#).

[Salesforce.com](#): Here is the godfather of CRM as a service. [Salesforce.com](#) offers one of the most advanced feature sets for pure salesforce automation, and its new [Service & Support](#) module for customer support is one of the best in the industry. [AppExchange](#) provides integration with a host of third-party components, including the [Intacct](#) ERP, and is what puts [Salesforce.com](#) in a category of its own. Of all the solutions we reviewed, Salesforce.com is the only one that can make credible claims at becoming a true platform, and if you place your CRM system at the center of your Office 2.0 setup, it is something worth considering.

[Solve360](#): This application is similar in spirit to [Relenta CRM](#), with a stronger focus on email, making it a good alternative to [group management](#) applications. It provides advanced synchronization with Microsoft Outlook, and a very affordable price of \$5.95 to \$9.95 per user per month.

[SugarCRM](#): Here is the leader in the open-source CRM space. With over a million downloads, 100,000 users, 800 paying customers, and 15,000 community members, it's a force to reckon with. From a functionality standpoint, it's almost on par with [NetSuite](#) or [Salesforce.com](#), but is priced at a more affordable \$75 per user per month for Sugar Enterprise On-Demand. Also, it provides four [deployment options](#), on-demand, appliance, on-site, and a new FastStack, which is an easier-to-install version of on-site. It is also aggressively moving toward the project management space, which should further distinguish it from its competition later in the year.

[vtiger](#): This one started as a fork of [SugarCRM](#), then was re-written from scratch and can be considered as sugar free today. It competes with SugarCRM by offering a slightly more liberal license, and is enjoying spectacular growth, witnessed by an Alexa ranking of 16,510. It is not yet on par with [SugarCRM](#) from a functionality standpoint, and is not available on-demand directly from its parent company, [AdventNet](#). Nevertheless, its [support contracts](#) are very aggressively priced, and its growing community of developers makes it a very attractive alternative to budget-constrained buyers.

[Zoho CRM](#): This last one is one of the most intriguing we have had to review for this article. [Zoho CRM](#) was originally built as a proof-of-concept to demonstrate the capabilities offered by other [Zoho](#) tools, especially [Zoho Creator](#). Even though it's also developed by [AdventNet](#), it does not share any code with [vtiger](#), and is only available as an on-demand solution. What makes it interesting is its pricing—free for up to 3 users, then \$12 per user per month—and the promise of integration with other components of the Zoho family of applications, especially [Zoho Writer](#), [Zoho Sheet](#), and [Zoho Virtual Office](#). If you're planning to build a Zoho-centric Office 2.0 setup, this one is definitely worth taking a look at.

### Personal Favorite

I originally started using [Salesforce.com](#) two years ago, and enjoyed it very much. Later on, I migrated to [SugarCRM](#), mainly as a way to learn what is available out there. I have been using it extensively for the past three months, and I am very impressed so far. I am using Sugar Enterprise On-Demand Version 4.5.0f (Build 1202), and found it very stable. Over the past three months, I have not experienced any interruption of service, and found the application very responsive. I use it to support my own GTD process, as described in this previous [article](#), and it's working as well as when I was using [Salesforce.com](#) for it. My only requests would be for improvement of Calendar views by displaying Contacts and Accounts that are related to Calls and Meetings,


as well as the addition of a wizard that would allow the creation of custom objects without having to develop a separate PHP module.

### What's Missing

From all the applications reviewed, the most critical feature that is currently missing is synchronization with a good web-based calendar such as [Google Calendar](#). It will become available for [Salesforce.com](#) with [Spanning Sync](#), and I must hope that [SugarCRM](#) will add support for [ICAL](#) so that I could take advantage of it for [my Office 2.0 setup](#). Down the road, integration of advanced [project management](#) capabilities would be a great addition, and I expect [SugarCRM](#) to lead the pack this year. A recent survey conducted by [Nucleus Research](#) with 198 organizations across numerous industries concluded that the top two categories for SaaS solutions are CRM and Project Management, and that "Project Management overtakes CRM in future buying intentions." It will be interesting to see how the two markets eventually overlap and possibly merge within certain industry verticals or business functions.

### Best CRM Application


Now that we know what's out there, it's time for a vote:

**Best online CRM application** 

What is the best online CRM application?

- Free CRM
- NetSuite
- Relenta CRM
- Salesboom
- Salesforce.com
- Solve360
- SugarCRM
- vtiger
- Zoho CRM

[View Results](#)

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Note: if you cannot see the voting form, please follow this [link](#).

Final results will be announced next week as an update to this post. In the meantime, please help me build next week's roundup on [Databases](#). You can use this [form](#) courtesy of Wufoo for suggesting new applications, or providing additional information about existing ones. I would also welcome ideas for domain-specific criteria that could be used for evaluating the players on our list.

See you next week!

Entry filed under: [Office 2.0](#)



## 9 Comments - [Add a comment](#)

1. [Perspectives on Salesforc...](#) | February 6th, 2007 at 9:47 pm

[...] The IT|Redux blog has a nice post comparing 9 on-demand CRM applications. [...]

2. [Andrew](#) | February 6th, 2007 at 10:22 pm

Your comments regarding the cost of salesforce.com are not entirely correct. Custom Objects can be created in all editions of Salesforce, starting with the entry level Team Edition.

3. [Sridhar Vembu](#) | February 6th, 2007 at 11:16 pm

Ismael,

One note on Zoho's Alexa ranking: we used to have zohocrm.com as a separate domain early on, but more recently we have consolidated all Zoho services under the zoho.com domain. Hence zohocrm.com domain ranking is not a meaningful indicator, and Alexa doesn't produce rankings for subdomains. But you can see the Alexa page for zoho.com [there](#). You can see that crm.zoho.com is one of the most popular within Zoho, which is not surprising since it was one of the earliest Zoho offerings.

Coming to the rest of the Zoho suite, we do have a well received project management service at [Zoho Projects](#), which we are enhancing constantly. We are also working on integrating other Zoho services with CRM over time. The goal of Zoho is to offer a comprehensive suite of services, very affordably priced. Pricing is personally very important to me, coming from a country where \$65 a month about equals the monthly per-capita GDP.

Finally, on vtiger, it is a completely different codebase from Zoho, and it is an open source project and entity backed by AdventNet. It is the only completely open-source CRM system—SugarCRM's Enterprise offering is not open-source at all. The exploding popularity of vtiger indicates how the market is smart enough to see the difference. vtiger's mission is to offer a clean, healthful open-source alternative that is sugar-free!

-Sridhar

4. [David](#) | February 7th, 2007 at 10:17 am

How can you ignore [Oracle CRM OnDemand](#)?

5. [Ismael Ghalimi](#) | February 7th, 2007 at 11:07 am

Andrew,

You're absolutely right. I just checked, and they seem to have changed their pricing model since the last time I reviewed it. Now, you can get 50 custom objects with the Team Edition. Plenty enough to build some nice applications. I updated the post accordingly.

Thanks for the heads up!

Best regards

-Ismael

6. [Ismael Ghalimi](#) | February 7th, 2007 at 11:16 am

Sridhar,

You're right regarding Zoho CRM's ranking on Alexa. I updated the post accordingly.

-Ismael

7. [Ismael Ghalimi](#) | February 7th, 2007 at 11:22 am

David,

Very simple: I only cover applications that are added to the [Office 2.0 Database](#), and [Oracle CRM OnDemand](#) was not. I also forgot to include [Entellium](#), [Pipeline Deals](#), and [RightNow](#), as [Scott Hemmeter](#) pointed out. I will update the post accordingly once I gather all the required information. In the meantime, I would very much appreciate your help in completing the database using this [form](#).

8. [Jim Baker](#) | February 8th, 2007 at 8:09 am

I would like to point out that Salesboom.com Enterprise edition includes Project Management On-Demand, integrated with the On-Demand CRM product. Project Management is not offered by Salesforce.com or NetSuite.com, but Salesboom.com has offered it for years. As you know, it is the second most required functionality On-Demand next to CRM.

9. [Jimmy Lin](#) | February 8th, 2007 at 10:10 am

@ Jim Baker,

Salesforce.com does offer project management modules. It can be integrated into your existing account free of charge. See this link from the AppExchange

[http://www.salesforce.com/appexchange/detail\\_overview.jsp?NavCode\\_\\_c=&id=a0330000000GImzAAG](http://www.salesforce.com/appexchange/detail_overview.jsp?NavCode__c=&id=a0330000000GImzAAG)

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## Side Notes

- ADbbble DB just added support for [charts and maps](#). (0)
- Check [Writer](#), a nostalgic Office 2.0 word processor [[LifeHacker](#)]. (0)
- [Box.net](#) is now [integrated](#) with [Zoho](#). (0)
- Welcome to the new IT|Redux! (0)

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