

# Customer Relationship Management (CRM) Software Category

SPRING 2024 Customer Success Report







### Customer Relationship Management (CRM) Software Category

Customer relationship management software is more than just a simple customer contact management software - it is a powerful tool that allows you to manage marketing, sales, accounting, POS (point-of-sale), vendor and a plethora of other operational data, all in one simplified and easily accessible solution. To define CRM from a growth standpoint, this range of tools is all about people, and allows you to find leads, follow up with potential customers, and even maintain customer loyalty by storing key information in an effort to boost sales by personalizing the whole buying and checkout experience.

The core functionality of customer relationship management software is to keep information from different sources organized so that they are easily accessible when you need them. There are a few small and large-scale businesses that often resort to traditional email, mobile and other address books, and although these methods are great, they fail as long-term sustainable solutions. Customer service and customer care management software allows you to store and manage valuable customer information such as purchase histories, contact information, and even how they browse your website, personal preferences, interests, demographics and a whole lot more.

#### featured customers

### Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

### The overall Customer Success ranking is a weighted average based on 3 parts:



### CONTENT SCORE

- Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- Customer reference rating score
- Year-over-year change in amount of customer references on FeaturedCustomers platform
- ✓ Total # of profile views on FeaturedCustomers platform
- Total # of customer reference views on FeaturedCustomers platform



### MARKET PRESENCE SCORE

- Social media followers including LinkedIn, Twitter, & Facebook
- ✓ Vendor momentum based on web traffic and search trends
- ✓ Organic SEO key term rankings
- Company presence including # of press mentions



### **COMPANY SCORE**

- Total # of employees (based on social media and public resources)
- Year-over-year change in # of employees over past 12 months
- ✓ Glassdoor ranking
- Venture capital raised





#### MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



#### TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



#### **RISING STAR**

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

### **2024 Customer Success Awards**

Check out this list of the highest rated Customer Relationship Management (CRM) Software based on the FeaturedCustomers Customer Success Report.



\* Companies listed in alphabetical order













Act! is the leading provider of all-in-one CRM and Marketing Automation solutions that empower small and midsize businesses to market better, sell more, and create customers for life.

### **138** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| We chose Act! as our CRM solution not just  | We chose Act! in the first place because we   |
|---|---|
| because it's easy to use, but also the scope it   | wanted a CRM that would help us to better   |
| offers us in terms of configuration. We're now  | understand, track and qualify our prospects   |
| opening around ten new accounts each year,  | and clients, but without having to wade   |
| a level of performance that's all due to Act! OLIVIER TARDIF  | through all of the non-essential features. BRIAN PASHKOFF   |
| CO-MANAGER AND SALES DIRECTOR, MANESSENS  | MANAGING PRINCIPAL, MGA, INC.   |
| <ul> <li>We compared various systems and chose Act!<br/>CRM because it's extremely customizable and<br/>also incredibly userfriendly. In less than half a<br/>day you can get a handle on the entire<br/>system.</li> <li>RONALD DEN TOOM<br/>BUSINESS DEVELOPMENT MANAGER, KH ENGINEERING</li> </ul> | <ul> <li>With Act! CRM everything to do with the sales<br/>process, from customer management to the<br/>signing of contracts, is connected.</li> <li>ARNO BEKKERS<br/>MANAGING DIRECTOR, TSD GROEP</li> </ul> |















ABOUT COPPER



Copper is the CRM that works for you. The #1 CRM recommended by Google, it's the leading CRM for Google Workspace. Copper puts the productivity of its users first by providing a seamless integration with Google Workspace, a beautiful user experience, and by helping teams and businesses build long-lasting relationships. Copper services more than 30,000 paid businesses in more than 100 countries building more valuable, longer-lasting relationships with this Google-recommended CRM.

#### 189 TOTAL CUSTOMER REFERENCES

**VIEW ALL** REFERENCES

#### FEATURED TESTIMONIALS

| <ul> <li>We felt a lot of pain from not being able to see or<br/>understand our customers. So that really drove us<br/>to a CRM—but it was Copper's ease of use and<br/>implementation, and the Chrome extension that<br/>made us decide to build the business on this<br/>platform. Copper has played a big role in us<br/>growing our business and brought us tremendous<br/>organization and simplicity.</li> <li>YOHANSE MANZANAREZ<br/>EVP OF SALES, EPIC FREIGHT</li> </ul> | <ul> <li>Thanks to Copper, we can easily find and look back<br/>at email conversations, each other's notes, and<br/>even create custom fields for questions asked to<br/>make sure we're getting a full picture of the<br/>candidate.</li> <li>CAROLINE YEAGER<br/>ASSOCIATE, IRISHANGELS</li> </ul> |
|---|--|
| Copper is by far the best CRM among the dozens I compared. With a simple and easy-to-use interface and the integration with Gmail, it's hands down the best CRM solution on the market. JOSHUA LEE CUSTOMER SUPPORT MANAGER_BACTRACK  | <ul> <li>[Copper] has saved us a substantial amount of<br/>time — I'm on it all day. Without this tool, I really<br/>think that it would add several hours every day.</li> <li>ANNALEE FINKENBINDER<br/>PARTNERSHIPS LEAD, BACK TO THE ROOTS</li> </ul>  |

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#### ABOUT CREATIO



Creatio is the leading provider of ONE platform to automate industry workflows and CRM with no-code and maximum degree of freedom. Creatio offering includes a no-code platform (Studio Creatio), CRM applications (Marketing, Sales, and Service), industry workflows for 20 verticals and marketplace add-ons.

# 176 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| Creatio platform makes us more flexible, and it easily<br>scales as our organization grows. The no-code technology<br>allows us to train our CRM business analysts to build<br>processes. It's not a pandora's box for coders only.<br>Business people also have their say in solution<br>development. The no-code platform has helped us<br>significantly accelerate our time to market. TOMASZ CIBOREK<br>GROUP SALES OPERATIONS DIRECTOR, ASSECO ASEE | <ul> <li>Customization with no-code makes system enhancement<br/>super easy. I go to the process designer, drag and drop<br/>what I would like to use, choose whatever object applies<br/>to the particular case scenario, configure the sequence of<br/>the steps and start process execution. There is always<br/>some solution that no-code can give us, so we love it!</li> <li>ANDREW THOMPSON<br/>TECHNICAL SPECIALIST, UPWARD SPORTS</li> </ul> |
|--|--|
| <ul> <li>By adopting Creatio, we switched from numerous manual<br/>interactions to a one-stop-shop approach that allows us<br/>to manage leads and opportunities, generate quotes, and<br/>process customer cases all in one system, keeping our<br/>records neat and clear.</li> <li>FABRICE COLIN<br/>COMMERCIAL DIGITAL TRANSFORMATION MANAGER,<br/>VYNOVA</li> </ul>   | <ul> <li>Having a low-code CRM tool as a salesbook and a single<br/>source of data allowed us to provide our salespeople with<br/>top-notch solutions to streamline our sales process.</li> <li>TIM RYAN<br/>REGIONAL SALES MANAGER, HERSHEY'S ICE CREAM</li> </ul>  |







#### ABOUT FRESHSALES

#### 😌 Freshsales

Top-rated sales CRM for your business. Freshsales (formerly Freshworks CRM) gives you everything you need to have personalized conversations and maximize conversions. Leverage the power of AI to forecast sales, qualify leads faster, and engage with the right prospects.

### **156** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| The implementation and onboarding for Freshsales was<br>very helpful. The CRM is very user-friendly and intuitive,<br>and it was very easy to set up. In fact, after we attended<br>Refresh 18, the user conference organized by Freshworks<br>last year, we became more involved in using the CRM<br>actively. We learnt how to set up sales campaigns and<br>workflows, and it is proving to be advantageous for us. IT<br>CARA HERBIG<br>GLOBAL ACCOUNTS MANAGER, IOTUM | <ul> <li>Freshsales helps us prioritize and focus on our opportunities. We're able to customize our pipeline, from deal stages to filters, unique to our business process. Other CRMs did not allow us to do this as intuitively and flexibly as Freshsales does.</li> <li>BRIAN ENGLES DIRECTOR OF PARTNERSHIPS, FACILITRON</li> </ul> |
|--|---|
| <ul> <li>We love [Freshsales]. It's fast, easy and intuitive.</li></ul>  | <ul> <li>With [Freshsales], the interface is straightforward, we get</li></ul>  |
| Workflows specifically eliminate manual work for us, so  | deeper visibility into our sales pipeline and we're able to   |
| my team can spend more time calling and onboarding   | generate powerful reports—in one hassle-free package. <li>ANTONIO PALANCA</li>  |
| our prospects and clients. <li>BRUCE KAMM</li>   | CHIEF EXECUTIVE OFFICER & CO-FOUNDER,   |
| CHIEF EVOLUTIONARY OFFICER, VIRTUALBARTER  | HIVEXCHANGE   |







### ABOUT HONEYBOOK HONEYBOOK

HoneyBook is the leading platform for independent business owners to manage their client flow and cash flow, streamlining all of the steps needed to sell and deliver personalized contracted services. By combining tools like billing, contracts and client communication, HoneyBook helps business owners get organized so they can provide an exceptional experience at every step. HoneyBook is trusted by service providers across the U.S. and Canada who have booked more than \$5 billion in business on its platform. Founded in 2013, HoneyBook is based in San Francisco and funded by Tiger Global Management, Norwest Venture Partners, Aleph, Hillsven...

### 222 TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

### **FEATURED TESTIMONIALS**

| <ul> <li>HoneyBook saves us hours each week<br/>because we don't have to go back and forth as<br/>a team asking one another for updates or<br/>clarification on the multiple custom projects<br/>we have going on simultaneously. It's all right<br/>there in one location.</li> <li>JAMIE KUTCHMAN WYNNE<br/>FOUNDER &amp; CHIEF EXECUTIVE OFFICER, MARIGOLD &amp;<br/>GRAY</li> </ul> | <ul> <li>I use HoneyBook for everything from inquiry,<br/>application, intake, questionnaire, contract,<br/>invoice, and communication. It's a one-stop<br/>portal for all of my coaching business.</li> <li>BECKY MOLLENCAMP<br/>BUSINESS MINDSET COACH, BECKY MOLLENKAMP, LLC</li> </ul> |
|---|--|
| <ul> <li>HoneyBook has been a LIFE changer.<br/>HoneyBook has saved countless hours and<br/>helped me book more clients. Thank you for<br/>creating this amazing CRM!</li> <li>NICOLE PASTERNACK<br/>PASTERNACK + CO.</li> </ul>  | <ul> <li>I love that HoneyBook automatically sends<br/>out payment reminders to my clients, it makes<br/>my life so much easier.</li> <li>CHANTE GULLY<br/>OWNER AND LEAD PLANNER, FOREVER TAEKEN</li> </ul>   |



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ABBY GRACE

john branch

**BIXBY + PINE** 





#### ABOUT HUBSPOT



HubSpot is the world's leading inbound marketing and sales platform. Since 2006, HubSpot has been on a mission to make the world more inbound. Today, over 15,000 customers in more than 90 countries use HubSpot's software, services, and support to transform the way they attract, engage, and delight customers. HubSpot's inbound marketing software, ranked #1 in customer satisfaction by VentureBeat, includes social media publishing and monitoring, blogging, SEO, website content management, email marketing, marketing automation, and reporting and analytics, all in one integrated platform. Sidekick, HubSpot's award-winning sales...

## 1557 TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

I The combination of the HubSpot marketing, CRM and sales software was exactly what we were looking for. With HubSpot Marketing Hub, we would be able to get to know our leads on a deeper level and use those insights to nurture them in a more targeted way. The HubSpot CRM was also a major attraction. For the first time, our sales and marketing teams would be working from the same page, sharing contacts, lead data and reports. II

#### RONALD SUHNER MARKETING MANAGER, VIRTAMED

HubSpot CRM allows us to effectively manage both our sales and production cycles in a way that's never been done before. The CRM has increased the number of deals we close and improved the accuracy of our

PETE ENDRES CO-FOUNDER, PARLOR SKIS

manufacturing process.

The sales team uses the HubSpot CRM now and that's definitely been very, very valuable. It allows us to be fully aligned in terms of the content that our salespeople use to convert prospects; they can see clearly the effect of all our activities and follow the journey of our visitors in the CRM.

HILDUR SMÁRADOTTIR VICE PRESIDENT OF GLOBAL MARKETING, VARNISH SOFTWARE

It's the best CRM we've ever used. It aligns all of our departments and is the ideal tool for our sales team, especially when it comes to lead scoring and tracking calls and contacts.

ANTHONY RODRICK VICE PRESIDENT OF SALES, TREKKSOFT







### ABOUT INSIGHTLY



Insightly provides customer relationship management software to small businesses worldwide. Small businesses leverage Insightly's cloud-based application to manage customer interactions, opportunities, proposals and projects over the web and on mobile devices. Insightly continues to grow globally and is available on the web at Insightly.com, for iOS devices in iTunes, and for Android devices on Google Play. Insightly is based in San Francisco.

### 239 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| <ul> <li>Adopting Insightly has helped us close deals faster because the entire team collaborates on providing mission-critical detail in the CRM. From my perspective as a sales leader, the support I get from the team to capture this information and close opportunities is absolutely critical to our success.</li> <li>IAN PUND SENIOR VICE PRESIDENT OF SALES, NOBLE BIOMATERIALS</li> </ul> | <ul> <li>For us, Insightly is by far the best, most simple, yet sophisticated CRM solution. I'd recommend Insightly to SMEs that want a streamlined system. The integration with Gmail and Google Apps makes managing the sales process a breeze.</li> <li>JUSTINE PERRY MANAGING DIRECTOR, CARIAD MARKETING</li> </ul> |
|--|---|
| <ul> <li>Prior to Insightly, we had to manually enter contact<br/>records into our CRM. Insightly's web-to-lead forms<br/>automatically create and route lead records on our<br/>behalf, freeing up more time for other value-added<br/>activities.</li> <li>ELAINA PRINCIPATO<br/>MARKETING COORDINATOR, NIX SENSOR LTD.</li> </ul>   | <ul> <li>It's one of the best CRM products I've ever seen, and I've been using CRMs for a long time. Insightly is easily configurable without the need to hire pricey technicians or consultants.</li> <li>JAY JOHNSON CO-FOUNDER AND CHAIRMAN, BOOKFUEL</li> </ul>   |









Keap is on a mission to simplify growth for millions of small businesses. For 15 years, Keap has been helping small businesses get organized so they can deliver great service and close more business. Today, the pioneer of CRM and marketing automation software for small businesses serves more than 200,000 users globally with its Infusionsoft and Keap products.

# 178 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| <ul> <li>I found Keap in a very funny way. I was trying out<br/>another CRM software program, but kept bumping<br/>into Keap. I liked it a lot better than the other<br/>software because everything was easier. After my<br/>third futile day with the competitor I signed up for<br/>Keap—and I've never looked back.</li> <li>NUNO SILVA<br/>FOUNDER, PAPELOJA</li> </ul> | So I wrote a business book, and at that point of my career, really pivoted from being an artist to being a business coach. I wanted to grow that business, so Keap was the CRM platform that we used to create a lead generator and start collecting leads. DONALD MILLER BUSINESS MADE SIMPLE |
|--|--|
| When I saw Keap, I was only looking for an email<br>program; but when I saw some of the CRM<br>capabilities, tasks and completion scenarios, and<br>follow-up sequences, I realized I could utilize it to<br>manage my employees and their workloads. DAMIEN SANCHEZ<br>FOUNDER, DC MOSQUITO SQUAD   | <ul> <li>This is going to sound kind of ridiculous, but it's fun again! Everything is in one place. I can see the priority for the day, knock it out, and feel good about myself.</li> <li>MAISHA HAGAN BEAUTY AND THE BOSS</li> </ul>   |













#### ABOUT MICROSOFT DYNAMICS 365



Microsoft Dynamics 365 unifies CRM and ERP capabilities into applications that work seamlessly together across sales, customer service, field service, operations, financials, marketing, and project service automation. Start with what you need and add applications as your business grows.

# 2752 TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

| The benefit of Dynamics 365 lies in its ability to be quickly configured to align forms to unique business processes. I was able to use CRM's workflows and business rules to create a tool for our sales team that adds value by making it easier for them to do their job. They are adding more information about their activities, customers and projects, and that is now visible across the organization. To the FAILLACE SENIOR IT GENERALIST, LUCK STONE | <ul> <li>SharePoint captures our sales processes, Dynamics CRM<br/>Online enables rapid follow up on leads and orders, and<br/>Office 365 centralizes the creation, storage, and sharing<br/>of quotations and sales reports.</li> <li>DAVID WAWORUNTU<br/>PRESIDENT DIRECTOR, EON CHEMICAL SOLUTION</li> </ul> |
|---|---|
| <ul> <li>The Microsoft CRM solution enables us to resolve at first point of contact as much as possible. They can answer any question anytime about any type of service, or navigate on behalf of the citizen.</li> <li>RHONDA TSINGOS DIRECTOR SERVICE, CITY OF BRAMPTON</li> </ul>  | <ul> <li>The more we learned about the capabilities [of Microsoft Dynamics CRM], the more we saw the logic of handling prospect, customer, and patient management through a single software program.</li> <li>KAREN DELI EXECUTIVE VICE PRESIDENT, SPECIALISTS ON CALL</li> </ul>                               |







#### ABOUT ORACLE NETSUITE

### ORACLE NETSUITE

In 1998, NetSuite pioneered the Cloud Computing revolution, establishing the world's first company dedicated to delivering business applications over the Internet. Today, NetSuite provides a suite of cloud-based financials / Enterprise Resource Planning (ERP) and omnichannel commerce software that runs the business of more than 20,000 customers in more than 200 countries and territories.

# **1698** TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

INetSuite's SuiteCloud solution, from CRM to ERP and the custom developed Network Inventory Management system, affords us a single version of the truth and a 360 degree view of our entire business. Our customers are the direct beneficiary of this integration in the form of more flexible offerings, faster installation timelines, transparency to critical data and quicker responses to questions and troubleshooting.

campaigns with NetSuite CRM and have professionalized the way we promote our educational offerings. We can quickly identify target groups by any number of attributes, and the reporting in NetSuite is very useful because we can easily see how many emails bounced, how many were delivered and how many people clicked through.

*We're a lot more precise and productive in our marketing* 

COLOGIX

I The best thing about NetSuite is the integration of ERP and CRM coupled with its SaaS based business model and Cloud-based delivery. NetSuite's customization capabilities allowed it to conform to our business processes while scaling with us as our business grew.

MARK VOGEL CO-CEO, SRS ACQUIOM FORMATION CONTINUE UNIL-EPFL

With NetSuite integrated with our CRM software, sales orders can be fulfilled and invoices sent automatically, cutting the time it takes to manage everything from 75 hours down to just 11 hours a month—one of many significant savings.

IOANNIS TSAKATANIS DIRECTOR OF FINANCIAL SYSTEMS, WORKABLE







#### ABOUT PIPEDRIVE

#### pipedrive

Pipedrive is a sales-focused customer relationship management tool loved by teams of all sizes. With 100,000+ paying customers spanning 179 countries, sales teams are attracted by Pipedrive's simple yet powerful design that prioritizes usability above all else. When using Pipedrive, nothing falls through the cracks, allowing your team to spend less time filing and more time selling with this agile and powerful CRM software.

### 275 TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

- *We run a cloud-based business and Pipedrive is by far the best Pipedrive is a simple and easy to use CRM platform that takes the* headache away from sales administration, allowing you to CRM in terms of usability, design and time to implement. Both the reallocate time to actually making sales. The support provided by iOS and Android apps are great and there is total buy-in from all Pipedrive is also brilliant, with a help service easily accessed at all our users. Great job guys. Try it, you won't be disappointed. 🗾 business times. If you are looking for something that has a simple user interface with a clear visual representation of business SEYOUM ABAY HEAD OF DIGITAL MARKETING & SALES, QUADRANGLE development, Pipedrive is the platform that you need to use. Even smaller businesses like our own will find it an affordable and frankly invaluable investment. It's like hiring a superhuman sales administrator for a fraction of a salary! LEE GANNON
- Pipedrive is easy to navigate, easy to customize, and I love the at-a-glance dashboard. Also scheduling tasks and next steps is super simple. This is the CRM I've been waiting for.
  - KRYSTAL FERGUSON GRAPHIC DESIGNER, UNKANNY DESIGN

Shout out to the Pipedrive team for building a perfect small business CRM. Finally organized with prospects, contacts & outreach. Very happy!

NEHA SAMPAT CO-FOUNDER, BUILT.IO



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#### ABOUT PIPELINER CRM



Pipeliner has revolutionized CRM with its unique visual interface, no-code workflow automation engine, and instant, dynamic insights and reporting. There is no other CRM that provides both salespeople and sales management with so many ways of displaying and analyzing sales data while also delivering intelligent, system-generated insights. Plus, thanks to the no-code automation engine and ease of integration with other systems (such as email, ERP, Marketing), Pipeliner eliminates many of the manual and routine tasks that other systems force on both salespeople and sales managers. The Pipeliner CRM experience is so different from traditional CRM which...

## 90

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

One of my favorite parts as a sales manager is using Pipeliner CRM to run sales campaigns that drive our team to have fun and use the system in a way that drives sales. For example, our January Super Bowl contest resulted in our best January sales results in 5 years and I couldn't have run it without Pipeliner.

#### LUKE WITTENBRAKER SALES AND MARKETING DIRECTOR, MACTECH ON-SITE

Pipeliner CRM is brilliantly easy to use and to navigate. I love being able to see everyone's pipeline in one screen, not having to troll through page after page or generate reports. It's all there for you and salespeople actually use it.

DOMINIC HODGES

Pipeliner CRM is the main worktool used by our sales team today. All client leads are registered, and then we have configured nine different sales steps for our business. Pipeliner CRM makes it easy to follow the different steps in the sales cycle, all the way to the end goal.

#### WILHELM LILJENCRANTZ SALES & BUSINESS MANAGER, RENTALS UNITED

A top CRM that has all the features and flexibility you can possibly need and still is easy to learn, administer, configure and use. The support and development is the best I ever met for any software.

HANNEKE GIELES BUSINESS EXCELLENCE LEAD, PROWARENESS WEON GROEP BV

#### **TRUSTED BY**



**O**CLIC**JATA** 

DRUMMOND Rethinking the way you print



CHOICE





ABOUT SAGE CRM

# Sage CRM

Sage CRM is optimised specifically for small and medium businesses. Easy to use and quick to deploy in the cloud or on-premise, Sage CRM delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, Sage CRM can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, they help you get the most from your CRM investment and accelerate your business growth.

# **336** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

We have changed the way our sales people work. With Sage CRM, customers are now segmented better and we can ensure a more personalised and proactive service. Our sales staff have the information they need at their fingertips saving time and simplifying the training of our sales reps as they only need to be familiar with one system.

ENRIC COMELLAS PRODUCT MANAGER, LIFASA, LIFASA

Sage CRM has enabled us to effectively segment our database according to different criteria. It is the ease and speed of managing all this information that allows us to manage prospect marketing and account management with greater precision and carry out better tracking of activity afterwards.

MIGUEL ANGEL PASTOR HEAD OF IT, WMF SPAIN Since Sage CRM, Boomerang Media has become more efficient than ever. All the information that we process and require for our daily operation is now more organised which has really helped improve our business efficiency and reduced the time spent on administrative tasks.

DANIEL MARTINEZ PRODUCT MANAGER, BOOMERANG MEDIA, BOOMERANG MEDIA

We managed a complete exhibition project within Sage CRM, from attaining prospects, tracking leads and enquiries that arose from the exhibition, to evaluating the return on investment and reporting on the overall success of the exhibition.

NEIL CURTIS HEAD OF MARKETING, ITM GROUP







#### ABOUT SALESFORCE



Salesforce is powering innovation in sales, service, marketing, community, analytics, apps, and more. Salesforce also put aside 1% of their equity, 1% of their employee's time, and 1% of their product, and formed the Salesforce Foundation. These two key decisions have fueled their incredible growth, made them the global leader in CRM, defined the era of cloud computing, and inspired a new philanthropic model for all to follow. Thanks to their dedicated employees, partners, and the customers they serve, their industry-leading customer platform has become the world's leading enterprise cloud ecosystem. Industries and companies of all sizes can connect...

## **1676** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| <ul> <li>With Sales Cloud, our teams are more efficient and more engaged. It's quicker to bring on new accounts, which will support our business growth goals.</li> <li>ELAINE KERR DIRECTOR OF SALES AND CRM, DPD</li> </ul> | <ul> <li>With Salesforce, we don't just get that<br/>view, we also get a wealth of insightful<br/>reports, real-time analytics, and<br/>personalized dashboards.</li> <li>TAREK ALEXANDER<br/>HEAD OF CRM, VICTOR</li> </ul> |
|---|--|
| <ul> <li>We chose to go with Salesforce for its intelligence, its scale, and its ability to support our needs beyond just the basic CRM.</li> <li>MICHAEL EGGERS DIRECTOR OF FINANCE, AMAZON WEB SERVICES</li> </ul>          | <ul> <li>Salesforce Essentials gives us<br/>everything we need — and nothing we<br/>don't.</li> <li>LASZLO BOCK<br/>FOUNDER, HUMU</li> </ul>   |







#### **ABOUT SUGARCRM**

**sugar**crm

SugarCRM enables businesses to create extraordinary customer relationships with the most empowering, adaptable and affordable customer relationship management (CRM) solution on the market. Unlike traditional CRM solutions that focus primarily on management and reporting, Sugar empowers the individual, coordinating the actions of customer-facing employees and equipping them with the right information at the right time to transform the customer experience.

#### 420 TOTAL CUSTOMER REFERENCES

#### **VIEW ALL** REFERENCES

#### **FEATURED TESTIMONIALS**

| <ul> <li>Commercially, Sugar worked well for us: we liked<br/>the product fit for our customer, and we were able<br/>to work with SugarCRM on our needs as an OEM.<br/>We're quite proud of the fact that we are working<br/>with Sugar – we like what you are doing with the<br/>brand – and we see a brilliant future in working<br/>together.</li> <li>GREG DENNICK<br/>HEAD OF ACLOUD OPERATIONS, ACCESS GROUP</li> </ul> | <ul> <li>The integration between InsideView and SugarCRM<br/>allows Insource to leverage social media and other<br/>real time data sources to our advantage, all in a<br/>simple to consume automated format. This<br/>merging of social and CRM system data gives us a<br/>competitive edge.</li> <li>CHIP MEYERS<br/>SALES OPERATIONS MANAGER, INSOURCE</li> </ul> |
|---|--|
| <ul> <li>Sugar is powerful yet easy to use. The learning curve is extremely fast and it integrated easily with third part products. This has made our team more efficient and supported our 18 percent growth without adding staff.</li> <li>MANUEL PEREIRA CIO, HIPERTEHUELCHE</li> </ul>  | <ul> <li>SugarCRM have been completely committed to<br/>ensuring that our deployment of Sugar is a success.<br/>They have proved themselves to be an excellent<br/>choice of supplier, and we have established a great<br/>working relationship.</li> <li>ALISON CLACK<br/>PROGRAMME MANAGER, MAZARS</li> </ul>  |





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FRESENIUS

MEDICAL CARE









#### ABOUT SUPEROFFICE



SuperOffice is one of Europe's leading suppliers of CRM solutions to the business-to-business market. SuperOffice makes CRM software for companies that want to stay ahead of the competition. This new version further improves upon last year's release of SuperOffice 7 which encompassed the whole customer lifecycle, from sales to marketing to customer service, and also included dramatic improvements in usability, enabling businesses to improve competitiveness and easier achieve their goals. Their software supports the individual user in achieving stronger sales, marketing and customer service...

### 162 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| <ul> <li>SuperOffice CRM covers our needs in</li></ul>    | <ul> <li>SuperOffice CRM equips our sales</li></ul>         |
|---|---|
| an excellent way. Ease of use and                         | team with information that deepens                          |
| flexibility makes this system a useful                    | their understanding of the challenges                       |
| tool for our entire company. <li>BENT COLLERT LARSEN</li> | customers face. <li>RICHARD HORNSBY</li>                    |
| SALES MANAGER, SKANNEX AS                                 | COMMERCIAL MANAGER, SHARP                                   |
|   |   |
| <ul> <li>SuperOffice clearly separated itself</li></ul>   | <ul> <li>It is hard to find such an intuitive and</li></ul> |
| from other CRM systems through its                        | straightforward CRM solution as                             |
| high user friendliness. <li>RALPH GRASSEL</li>            | SuperOffice. Buy it. <li>BRYAN LINDENSKJOLD</li>            |
| PROJECT MANAGER, DEUTSCHE BAHN                            | EMARKETSQUARE   |









Thryv supports more than 400,000 local businesses across the U.S. with marketing services and small business software, Thryv and Thryv Leads. The company's cutting-edge technologies connect small businesses with their target consumers and help them manage their day-to-day work. Thryv helps businesses manage their work easier and get found fast, wherever consumers are searching.

# **164** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| Seeing the whole picture of who was<br>going to be where and when – that just<br>doesn't come across on paper. With<br>Thryv, we are able to conceptualize it, see<br>it, and have it all in one place that<br>everybody can access. KATE MAXWELL<br>WINGMOM | <ul> <li>My overall experience with Thryv has<br/>been great. Their customer service is<br/>Amazing. It's just made us more<br/>organized and effective and efficient.</li> <li>ELAINE WEST<br/>FOUNDER, ROOTERVILLE ANIMAL SANCTUARY</li> </ul> |
|--|--|
| <ul> <li>The Client Portal is easy for customers to<br/>log in, get directions, and send us a<br/>message. It just makes communication<br/>simpler.</li> <li>MICHAEL BURROWS<br/>OWNER, BEYOND AQUATICS</li> </ul>   | Thryv's CRM feature helps me stay organized and engaged with my clients. PAULA BLAIR OWNER, SOAR CO-WORKING  |











#### ABOUT AFFINITY



Affinity's patented technology structures and analyzes millions of data points across emails, calendars, and third party sources to offer users the tools they need to automatically manage their most valuable relationships, prioritize important connections, and discover untapped opportunities. Affinity uses artificial intelligence to analyze relationship strength and illuminate the best paths to warm introductions. The platform also offers a holistic view of users' networks in a centralized, automatically updated database without any manual upkeep. Founded in 2014, Affinity is headquartered in San Francisco,...

### **108** TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

*Affinity has become a daily tool that is ingrained in Our entire global team can log into Affinity to see* our workflow. I get a richness of data that didn't what's coming through the pipeline, even if they exist before. When I am connecting with someone, haven't been involved in the deal directly. So if they knowing if anyone at my firm already has a solid have specific expertise relevant to the deal, they relationship or has recently connected with them is can chime in. It lets us overcome geography to give key. It enables us to be able to move fast in the us a global perspective on our decision-making. same direction without stepping over each other. SAM CAMPBELL **BURKE DAVIS** *Affinity has allowed us to turn information and* Affinity has helped us centralize our CRM efforts in data more easily into action. All of our insights are the most automated way by organizing our in the same place, where people can move through pipeline, community, to do's, and distributing our the creation of lists, templates, views, etc. Alliances to portfolio companies. PETER MITCHELL MICHAFI TAM





Fidelity

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ABOUT AGILE CRM



Agile CRM is a leading sales, marketing and service CRM for small businesses. Complete with everything from web popups and email templates to telephony integration and advanced sales and marketing automation, Agile is designed to help you sell and market like the Fortune 500, at a fraction of the cost.

# 68

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| <ul> <li>I'm really impressed with the way Agile CRM works.<br/>I LOVE the contact timeline! This is a killer feature.<br/>It means that in one place anyone on the team can<br/>see all the communications with a contact, even if<br/>an email was sent (IMAP) from outlook or web<br/>mail.</li> <li>BRENTON O'BRIEN<br/>MANAGING DIRECTOR, MICROBRIC</li> </ul> | <ul> <li>Agile CRM is the coolest, easiest and by far the most productive CRM I've ever used. Within 20 minutes we had customized the CRM and sent out a complex outbound email campaign. We're already converting our leads. Insane!</li> <li>GARY TRAMER CEO, LEADCHAT</li> </ul> |
|---|---|
| <ul> <li>Agile CRM automatically tracks users in customer<br/>lifecycle and sends emails to our customers. The<br/>funnel, growth and cohorts metrics are our lifeline.<br/>Highly recommended.</li> <li>DINESH<br/>GROWTH HACKER, CLICKDESK</li> </ul>   | <ul> <li>Agile CRM is an exciting and powerful system. The capability to create complex workflows is immensely useful and easy - simply a matter of drag and drop.</li> <li>RON KAPLAN SALES AND BUSINESS DEVELOPMENT, ESPRESSO LOGIC</li> </ul>                                    |







#### ABOUT APTEAN CRM



Aptean CRM delivers industry best practices to help you nurture customer relationships and increase your competitive advantage. Aptean CRM gives you a complete view of your customer. It's designed to provide your organization with accurate sales, marketing and customer service information so all departments remain in sync and organized. With detailed history of marketing, sales and service efforts, in addition to customer characteristics and preferences, Aptean CRM software allows you to make the most of each customer interaction and generate data-driven decisions based on real-time..

# 42

### TOTAL CUSTOMER REFERENCES

#### **VIEW ALL** REFERENCES

#### FEATURED TESTIMONIALS

[Aptean CRM] provides a higher level of information to our sales team, but it also provides additional information to the management team.[Aptean CRM] helps us plan our sales forecast and identify any existing sales opportunities—We can now develop sales strategies based on all the data we're collecting. CRM also gives us visibility on how prospects are progressing,... **!!** 

#### WALTER HEINE DIRECTOR OF SALES, CONCORDE BATTERY

*We looked at other big-name competitors in the CRM market, and* [Aptean CRM] seemed like a better fit without having to do all the heavy lifting—it does everything we need it to do. One of the reasons why we selected [Aptean CRM] over other vendors is so we can pass data from CRM to ERP and quotations. In that, we really liked the features and functionality and flexibility in the software. We're currently beta testing the CRM 10 version of the... **!!** 

### MATT HOWFIL

[Aptean CRM] has made my life easier in monitoring sales activities and it has made the sales team's lives easier by more efficiently tracking activity and scheduling follow ups. Our goal at Olympus Group is to be the most responsive company out there. I believe that having a CRM like [Aptean CRM] does make us more responsive.

RYAN HOI 7HAUFR

New CRM users can pick up the software really quickly. It's very easy to be able to know what you're doing. We've had new users learn how to use the customer relationship management tool in as little as one day.

DAVID WALSH SENIOR VP OF TECHNOLOGY, THE EQUITABLE BANK

y brothers













#### ABOUT CLOSE CRM

🔅 Close

Close is a sales engagement CRM designed to help SMBs turn more leads into revenue. A multichannel platform, Close lets users email, call, and text leads from the desktop — without add-ons. Every touchpoint with a lead is automatically tracked in a visual timeline so teams can skip the CRM busywork and focus on the deal. The vendor states that with its productivity tools like the task reminders and the Power Dialer, users will reach more leads, follow up more often, and close more deals.

### 80

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| After testing other CRMs, I was blown away by<br>Close.io's clean, easy-to-use interface,<br>communication tracking, and detailed<br>reporting features. Tracking communication<br>with Close.io has made what was a very<br>time-consuming process extremely efficient. JACQUELINE DAVIS<br>PROGRAM MANAGER, LOYALTY RESEARCH CENTER | <ul> <li>Changing our CRM platform to Close is one of<br/>the best decisions we have made. The<br/>platform does everything we need, and the<br/>support is simply outstanding.</li> <li>MIKE CORRADINI<br/>CEO &amp; CO-FOUNDER, IDEAPROS</li> </ul> |
|---|---|
| <ul> <li>What sets Close.io apart from other CRMs is<br/>the quality of its data. It automates the<br/>collection of sales interaction data and<br/>compiles it in seconds.</li> <li>MICHAEL CARNEY<br/>EDITOR, PANDODAILY</li> </ul>   | <ul> <li>Close is the single best CRM, and I've used<br/>them all. It has increased my follow up rate by<br/>at least 50%. It's a salesperson's dream.</li> <li>GRACE EDISON<br/>SALES COACH, SUNNY LENARDUZZI</li> </ul>                             |







#### ABOUT CRMNEXT



CRMNEXT is a financial services CRM solution designed specifically with the needs of banks and credit unions in mind. The platform integrates your core and other existing technology under a simple, easy-to-use interface that lets you see all customer and member information and complete tasks in one place. Long gone are the days stuck behind the computer having to cut-and-paste across systems to get work done. CRMNEXT automates the boring stuff so you can focus on real-life relationships instead. More than one million financial institution employees use CRMNEXT on a daily basis to...

# 55

### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

Transitioning to a high-impact digital platform has been a massive, yet seamless experience with CRMNEXT. It will help us to drive our digital strategies in an agile and scalable environment efficiently, with faster fulfillment, delivering superior customer experience. Building on the robust new customer management platform, we aim to cement our position as a digital-first bank.

ANIL RAO HEAD – OPERATIONS, INDUSIND BANK If Keeping in line with our core values of customer centricity, CRMNEXT Solution has acted as a catalyst to enhance this vision. The solution flexibility allows for the upsell and cross sell offerings reach the right customers at the right time. Also, the CRM service offering has helped us in efficiently resolving service requests within customer TATS. II

AVINASH RAGHAVENDRA EVP AND HEAD - IT, AXIS BANK

If CRMNEXT enables us to deploy smart, intelligent journeys resulting in faster fulfillment and go to market for our new products and services and lower cost of sales. It has boosted our capabilities to deliver superlative customer experience and further strengthen customer loyalty.

SANJAY GUPTA PRESIDENT & BUSINESS HEAD – IT, KOTAK BANK With CRMNEXT we have been able to successfully bring all processes related to customer relationship including sales, services, campaigns, and performance management across all physical and digital channels on a unified agile platform.

NGUYEN HUU HUNG HEAD OF STRATEGIC PROJECTS & DATA ANALYTIC, TP BANK



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#### ABOUT FREEAGENT CRM



FreeAgent CRM delivers a next-gen work experience. Our cloud-based platform help teams unlock productivity and grow sales effortlessly. Stay in the zone, with Al-guided selling. See only what you need when you need it, with a flow-based feed of personalized and prioritized tasks and key insights. Zoom in and out between high-level overviews and deep-dive activity tracking that all happens automatically. Track and celebrate activities that lead to sales and happy customers.

# 89

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

I love it! I'm more visual so I like the pictures and different ways of reviewing my policies. I had other demos, but FreeAgent is the only one really insurance optimized. It is exactly what I was looking for. Now that I have purchased and been trained on the variety of ways to use this program, I am SO excited and recommend it highly to anyone. One reason I love it so much is how easy it is to tailor it to what I want. I have been in the... IF

#### CARMEN VONK CASCADE FINANCIAL AND INSURANCE SERVICES

FreeAgent is the best value for your money. This is my first experience with CRMs and its been so pleasant and not frustrating. That's hard to find in the tech world for me. Our rep is wonderful and knows her stuff! Simple, easy to use and easily learnable. Helpful staff that are there quickly to help with any issues that come up or that you have questions about. Integrates well with Office 365. Looks great and is neat and tidy.

ABI LICATINO NEW HOME SALES COACH

Having all my contacts and clients in FreeAgent CRM allows me to quickly understand which client I need to contact and work with. It is also super easy to use.

BRAD VICE PRESIDENT OF SALES, ELECTRIC MOTORS AND PUMP, LLC I picked FreeAgent CRM because it's not complicated to use. It tracks everything I need including my emails, outbound calls, and meetings so I can keep my business on track. II

JUDD WHITEMAN CHICAGO TITLE





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ABOUT MAXIMIZER CRM



Maximizer CRM has been a leader in CRM software for over 25 years. Maximizer Wealth Management solution helps investment advisors and wealth management firms expand their book of business by effectively managing clients and streamlining complex operations. Maximizer CRM is easy to securely deploy and inexpensive to maintain, yet powerful enough to meet the specific needs of financial services professionals.

### 170 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

| Maximizer CRM is a user friendly solution with<br>functionality well suited to the recruitment<br>industry. From a data capturing perspective and<br>through the use of automation, we have seen a<br>reduction in errors which has led to better data<br>quality and faster, more accurate search results. AMANDA DREYER<br>MANAGING DIRECTOR, THE RECRUITERS NETWORK | <ul> <li>With Maximizer CRM, we now have a centralized database of all of our project bids, drawings and purchase orders plus our management team can easily forecast man power trending and monitor our satellite offices by utilizing Maximizer's dashboards.</li> <li>DAN MOORE SENIOR VICE PRESIDENT, ROBERTS ONSITE</li> </ul> |
|--|---|
| <ul> <li>I've used Maximizer CRM for over 20 years for<br/>opportunities, customer cases, leads, and<br/>recording the products our clients have. The<br/>customer service from Maximizer is out-standing.<br/>Highly recommend it for any business.</li> <li>DAVID MOTKOWSKI<br/>PRINCIPAL, VISTAPLAN FINANCIAL GROUP</li> </ul>                                      | <ul> <li>For us, Maximizer CRM is a mission-critical application. We store contacts, correspondence, and we track our people's activities. Maximizer is like the engine at the back of our rocket.</li> <li>JAGAT PANDYA AGENCY MANAGER, SLATE PERSONNEL</li> </ul>   |







#### ABOUT NIMBLE



Nimble is the simple, smart CRM platform that Office 365 and G Suite users trust to find prospects, nurture relationships, and close more deals — all without leaving their inbox. Thousands of people use Nimble to successfully nurture their personal and business relationships across email, social networks, and more than 160 SaaS business applications. Nimble has been named "Market Leading CRM for Customer Satisfaction and Ease of Use" by many experts, including CRM Market Leader by G2 Crowd in Spring 2019 for the seventh consecutive year, CRM Watchlist Winner for three consecutive years, #1 Sales Intelligence Tool for Customer Satisfaction by G2 Crowd for...

### **181** TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

We ditched our CRM and replaced it with something different and way better. Nimble is a game-changer for us. It helps us manage relationships smarter. By doing the research and data entry for us, Nimble frees us up to communicate individually and meaningfully with each person we know. Instead of spending hours googling people and working in batches on a schedule, Nimble lets us work on-the-fly. As we think of something, we act...

#### MIKE WITTENSTEIN FOUNDER, STORYMINER

SHANE

**BARKER** 

I have sold, competed and worked with many CRM systems in my time and Nimble stands out alone of the easiest to use and it shows immediate value. The automatic Gmail and social integrations help cut down on CRM administration time, giving our salespeople a solution that drives productivity by allowing them to focus on sales outreach. IF

#### BEN COOK CHIEF CUSTOMER OFFICER, SECTION.IO

INimble was appealing to us because it has a richer, user friendly interface and provides a lot more functionality than traditional CRMs Nimble adds value to our lead generation services by providing our team, as well as our clients with intelligence and enablement tools for cultivating 1:1 relationships with prospective customers.

JEFFREY SMITH CHIEF EXECUTIVE OFFICER, EMARKETING360 What makes Nimble CRM unique is that it's squarely focused on relationship-building, empowering the whole company (not just salespeople) to communicate effectively with all the requisite context & social insights they need to engage.

RICH BOHN PRESIDENT, SELL MORE NOW LLC





...





#### ABOUT NUTSHELL CRM



Nutshell is a collaborative customer relationship and sales management tool made for the modern business. It provides companies with fully customizable sales processes, powerful reports, collaboration tools, a refined user experience, email sync, integrations with popular business applications, including Google, MailChimp, Microsoft Exchange, Twitter, Dropbox and many more. Nutshell is stacked with great features that help businesses become more collaborative and grow, intuitive design that eliminates the need for specialized training, and insightful data that helps businesses learn and improve. Nutshell is a beautiful, powerful tool that combines...

### 64

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

| <ul> <li>The greatest benefit is tracking your</li></ul>     | <ul> <li>First and foremost, Nutshell has a #1</li></ul> |
|--|--|
| leads and where they come from. It's                         | Customer Service Team! This, in my                       |
| been very beneficial to tag each lead                        | opinion, is the sole driving force                       |
| and look at them on the map view to                          | toward effective sales on the part of                    |
| evaluate our marketing efforts. <li>APRIL M.</li>            | its users. <li>JOSHUA A.</li>                            |
| TERRITORY SALES REPRESENTATIVE, LIRA CLINICAL                | GREENPOINT GLOBAL  |
| <ul> <li>Nutshell is simple. It's as user-friendly</li></ul> | <ul> <li>Many CRMs force you into one</li></ul>          |
| as it gets and new sales reps pick it up                     | method or process, but Nutshell gives                    |
| more quickly than any other CRM                              | you choices that help you customize it                   |
| we've tried. <li>CHRIS JOFFE</li>                            | to your company. <li>MATTHEW M.</li>                     |
| OWNER, JOFFE EMERGENCY SERVICES                              | DICKSON  |







# ontraport

Ontraport was founded in 2006 to help small and medium-sized businesses meet the unique challenges of the marketplace. The company helps clients with all aspects of automated and integrated systems, including multi-media integration and successful implementation of CRM systems and other marketing tools.

87

Y Combinator

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

### **FEATURED TESTIMONIALS**

| <ul> <li>I love this CRM! Ontraport has changed the way I do<br/>business, and I recommend it to all my clients. The<br/>support is wonderful and the platform is powerful. You<br/>can set up any funnel you can dream up! Before<br/>Ontraport, I was overworked; after getting Ontraport I<br/>have so much more time. You won't regret making the<br/>leap!</li> <li>REBECCA BARNHEART<br/>YOUR BUSINESS DESIGNER</li> </ul> | <ul> <li>Ontraport has changed my life and my business. I have<br/>never seen a support staff more dedicated to a software<br/>and they are always there to help. The Ontraport team<br/>goes above and beyond to get your problem resolved. I<br/>have been using Ontraport for over three years now, and<br/>I would never move to another software.</li> <li>ERIN MCCLOSKEY<br/>HEALTH COACH INSTITUTE</li> </ul> |
|--|--|
| <ul> <li>Ontraport not only provides the best CRM and marketing automation tools for small businesses, but now they've added an excellent education component. One idea alone, from one of the dozens of speakers, can literally double your business!</li> <li>JUAN MARTITEGU MINDVALLEY INSIGHTS</li> </ul>  | <ul> <li>Ontraport has hands down the most comprehensive CRM system on the planet. Their customer service is second to NONE.</li> <li>JORDAN WHINNEM RAVENSWAY STRATEGIES</li> </ul>   |

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BEST SELF MAGAZINE

MBA MEDIABUYER Association





#### ABOUT PIPELINE

**Pipeline** 

Founded in 2006, Pipeline is the most adopted CRM for small and midsize businesses, empowering sales teams across a breadth of industries to build game changing relationships. Pipeline is built around an easy-to-use and customizable user experience, sales focused features, and leading customer support and service. Today more than 18,000 users in 100 countries use Pipeline to gain visibility into their sales pipeline to accelerate opportunities and close more deals. Headquartered in Seattle, WA, Pipeline has made the annual Inc. 5000 list since 2014, recognized as one of the fastest growing...

### **100** TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

If I spent over two months reviewing dozens of CRMs. When all was said and done, nothing really came close to PipelineDeals. It has everything a sales person needs, without a lot of unnecessary fluff. No other product matched the ease of customization and none were easier to learn to use. The goals feature is in a class by itself. Most important of all, PipelineDeals has the best customer support - hands down. I recommend it to anyone who's living relies on keeping your contacts, deals and appointments organized.

#### BRIAN SWITZER BUSINESS IMPROVEMENT SPECIALIST, CENTRAL PAYMENT

If Pipeline CRM is simple, clear, and concise. It's not bogged down with a lot of extra noise. It was very difficult to get compliance with previous tools. Now we're capturing all the information we need in one system that's easy to access. That in and of itself is transformative. II

MARGARET PAGEL VP OF SALES AND MARKETING, 8TH LIGHT I Thank you for having such a great CRM. I researched for over 3 years now and went through as many as 20 CRMs before finding you guys. Your product is simple, easy to use and a powerful sales tool. We enjoy using it and it helps us with sales. Keep up the good work and good pricing!

WILLIAM SCOTT BROKER, BAIASMART

With Pipeline CRM, we're communicating better and closing deals much faster. The best thing is the reporting. All the information we need to accelerate our business is right at our fingertips.

#### KIM HICKS SALES ADMINISTRATOR, CORNERSTONE EL

















#### ABOUT UNANET CRM BY COSENTIAL



As the AEC industry continues to see upward motions of digital transformations, Cosential has been leading the charge in that movement. Cosential is the only growth platform that goes beyond a CRM in owning the pre-sales process for market leaders winning business in the AEC industry. Cosential has spent the last 20+ years tailoring their platform's robust CRM and powerful proposal generation features to the construction and related industries-empowering Business Developers, Marketers, Executives, and select Project Teams to own, enrich, and leverage their firm-owned data...

77

#### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

My favorite part of Unanet CRM by Cosential is the opportunity database, the way it stores data, especially with value lists. It has changed the way we pursue work. I work directly with all of the marketing coordinators, and we're constantly looking at our hit rates, and the fact that we have all this information directly at our fingertips so quickly, so easily, so accurately—it's very important to us. There's so much data you have, and you need to find a place to put it. Unanet CRM by Cosential is that for us.

#### DEBORAH BOYD SENIOR ASSOCIATE, CORPORATE MARKETING, KCI TECHNOLOGIES

If Unanet CRM by Cosential is a huge time-saver when all I have to do is make one change to a project on my dashboard and it populates all the associated records within Unanet CRM by Cosential. It keeps me focused on my pipeline instead of data management.

CHRIS JACOBS SENIOR MARKET DATA ANALYST, JE DUNN CONSTRUCTION If One of the best things about [Unanet CRM by Cosential] has been the top-notch customer service. We are always able to get help from a real person and from someone that is extremely knowledgeable. Any issues we've raised have been dealt with immediately or in a timely fashion with good feedback in the interim on the status of the solution. Awesome customer service.

#### ROGER T. SMITH VICE PRESIDENT, HOWELL CONSTRUCTION

My favorite part of Unanet CRM by Cosential is the dashboard widgets and reporting. Unanet CRM by Cosential allows us to ensure all our departments can share and compare data points easily and make it easy for our executives to evaluate our business development and marketing efforts. IT

ANTHONY RUSS RESOURCE COORDINATOR, CONSIGLI CONSTRUCTION







#### ABOUT VTIGER



Vtiger is a CRM software company on a mission to help customer facing teams at small and medium sized businesses work more effectively to build lasting relationships with customers through easy-to-use and customize CRM software. Supported by an active community of users and developers, Vtiger CRM is available in more than 10 languages and receives input from businesses and partner networks in more than 100 countries around the world.

72

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

*With Vtiger CRM, our sales managers generate sales reports With Vtiger we implemented an effective ticketing system which* regularly to track opportunities in the pipeline. And if the was not possible with other CRMs. We set up custom workflows in managers spot opportunities in the same status for a long time, Vtiger with minimum efforts. We built new modules to track they quickly intervene to check if sales reps are facing any reseller interactions and order information with Vtiger's Module difficulties in progressing the deal. Since Vtiger helps us keep our Builder to capture extra information that was previously not sales pipelines accurate and healthy, we are able to estimate possible. 🗾 monthly targets and forecast our quarterly sales better without... **!!** PURVA SANIAY RAY CHOWDHURY Vtiger CRM serves as a hub for organizing and making sense of We were looking for the best CRM on the market, we compared the capabilities and decided that Vtiger has the tools, valuable business data and insights needed to manage characteristics, and features that we were looking for at an information about our customers. unexpectedly low cost per seat. MARCO OLIVOTTO WILMER OLIVEROS







#### ABOUT ZENDESK SELL



Zendesk Sell is simple and designed to keep reps selling. Sell eliminates the friction from deal updates so reps and management are always able to access, analyze, and collaborate on relevant deal data. Your sales team deals with a lot. Between juggling massive to-do lists and managing growing customer expectations, it is no wonder sales is a high stakes game. Zendesk Sell is an easy-to-love sales tool designed to help sales teams boost productivity, make data-driven decisionsand deliver better customer experiences.

# **107** TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

| <ul> <li>Now that Sell has been established for about</li></ul>  | <ul> <li>We started using Sell nine months ago. Since</li></ul>   |
|--|---|
| three years, there's a network effect. When a  | then, we have had 1,000% growth. It was our   |
| rep joins Sartorius, they jump right into a  | biggest year so far. If we didn't have a CRM  |
| territory and have all the contacts, leads and   | like Sell, we would not have been able to do  |
| deals from their predecessors – all the  | that because the information was scattered  |
| information is in one place. <li>MARK COLEMAN</li>   | everywhere. <li>KEVIN CREUSY</li>   |
| PROJECT MANAGER, SARTORIUS   | CEO, UPFLUENCE  |
| The biggest thing I love about Sell is that I don't need to ask my reps to update the database at the end of a long day. They don't need to change their workflows – Sell has become a natural part of their workflow.  SHELBY STANLEY INTERNATIONAL MARKETING DIRECTOR, THE WINDOW OUTFITTERS | <ul> <li>Zendesk Sell has improved our sales<br/>productivity. We have redistributed sales force<br/>efforts to more promising projects and the<br/>accuracy of the monthly revenue forecast<br/>increased from 30% to 10% deviation.</li> <li>NATALIYA AGAFONOVA<br/>CHIEF OPERATING OFFICER, INTERMIND</li> </ul> |











#### ABOUT COMMENCE



Commence Corporation is a leading provider of Customer Relationship Management Software serving small to mid-size enterprises. Commence is a comprehensive CRM offering that automates the front office business processes that directly impact sales execution and customer service. Applications are available for account and contact management, activity management, lead and sales opportunity management, marketing campaign management, customer service, a customer portal and project management. Mobile connectivity and integration with e-mail providers and social media are also components of this top rated CRM...

# **49**

#### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

We had three specific requirements for the selection of a CRM system. First, a quality product from a company with a track record for successful implementations of their product and a return on investment. Next a trusted hosting service so that our data was protected. Lastly, a company that you could call and get assistance when required. Commence has met all three expectations. The product is much more robust then similar offerings, the hosting service is best in class and the customer support has been excellent. I highly recommend Commence CRM.

#### HANS WEGMAN

MEDI 🔛 HERB

What we liked about Commence CRM was how robust and customizable it was as compared to similarly priced products. Commence is a powerful tool that integrates marketing, sales and lead management seamlessly. Commence support has been amazing with a friendly knowledgeable staff eager to help.

#### MARY NICOLAZZO CANADA EAST EQUIPMENT DEALERS' ASSOCIATION

After a review of several solutions we chose Commence CRM. We found the program to be functionality rich, affordable and easy to use. In addition, the Commence staff was very helpful during the evaluation process. We have certainly improved our internal efficiency because of the Commence product and their staff.

KARA MOORE FIBERPOL, INC.

Commence is hands down the very best CRM solution on the market for small-to-medium sized businesses. My relationship with Commence is what I wish I had with all my vendors. I can't recommend them highly enough.

MELINDA K. SPILLE DIRECTOR OF MARKETING, WEIGHT WATCHERS









Hewlett Packard Enterprise





#### ABOUT GOLD-VISION CRM

# gold-vision

Gold-Vision is a fully featured CRM solution that unifies Sales & Marketing. Their team background is based on extensive business and systems experience, matched by expert technical knowledge. Gold-Vision supports the full business lifecycle including customer management, sales automation, marketing automation, project and event management. Gold-Vision stands out from the crowd with interactive dashboard reporting and device independent mobile access. Power lies behind the simplicity, including a unique tracking facility which automatically assigns emails and appointments to the right account records. Use Gold-Vision either cloud or on-premises and implement with...

# 65

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

Gold-Vision is great and easy to use. It makes Our experience with Gold-Vision has been it quick and easy to create complex quotes, exceptional. They really took the time to and the ability to easily view pipeline sales understand our process and what we needed has been extremely helpful. Support from out of a CRM and ultimately designed Jiggy and the wider team has been fantastic! something that exceeded our expectations. MARK TAYLOR LINDA MALMSTADT VP OF SALES & MARKETING, PORTCO PACKAGING Gold-Vision provides T-T Pumps with a flexible *A truly integrated approach to managing* and simple solution, accessible on any device customer and supplier communications, leads from any location to ensure service and opportunities, projects, support tickets, maintenance jobs can be seamlessly and more - highly recommended. managed. ANDY SMERDON MANAGING DIRECTOR, AQUATEC JIGGY PATEL

BROADSTONE

ACCOUNT MANAGER, T-T PUMPS

**TRUSTED BY** 



palletline Network Freight Distribution



Wilde





#### ABOUT KOMMO



When small sales teams need to cut through the noise and win more sales, they choose Kommo. It's the only solution that can fully automate the sales process from lead capture to won sale and beyond — we even offer a recurring sales pipeline that's perfect for SaaS! But as powerful as Kommo is, it's also ultra-easy to use. The whole team can get up and running in less than 15 minutes. And we're all about support: if you need a little extra help, we're here for you — we offer totally free set up assistance, onboarding and ongoing support. Headquarted in San Francisco, we already serve over 20,000 small and medium worldwide....

### 64

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

[Kommo] helps me to sell more by giving me a *Our company trialed several applications for* simple and easy way to organize our CRM management programme. [Kommo] has company sales process and costumer been our chosen application due to its relationship. I have already tried other friendly and relevant user interface and softwares and [Kommo] is certainly the best functionality, creating a perfect solution for choice for small companies. our sales team. **GUSTAVO GUBERT** P.FARREY SALES MANAGER, W NETWORK LTD [Kommo] was the best system we found after [Kommo] helps me organize my leads! It long research. After a year, this key tool made categorizes my leads in many ways, so I can our sale representative more efficient and set reminders, integrate my email with each increase our productivity. Easy to use and lead, and make notes. very visual. I love [Kommo]. MARICON HILARIO SYLVAIN ROY

TRUSTED BY

SWEET HEAT



Barlow&Co.







#### ABOUT LESS ANNOYING CRM

### Less Annoying CRM

Less Annoying CRM is a simple, easy to use, and affordable CRM built from the ground up for small businesses. Thousands of companies use LACRM to manage their contacts, track leads, and stay on top of follow ups. In addition to a thirty day free trial with no credit cards or contracts up front, LACRM offers free unlimited phone and email support, including training and importing help.

# 35

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

I chose Less Annoying CRM because, well, it's less annoying! When I visited other possibilities, their ramp-up was complex and their learning curve depended on many hours of videos and other orientation. (Plus, the name makes me smile!) LACRM has been awesome - simple, straightforward, a few simple, clear videos for support, and an extremely friendly and helpful support team. I've requested help a few times and always have enjoyed reliable,... II

#### BARBARA FRANK BFRANKCOMMUNICATION

II had been using an expensive "big" CRM system. The functionality was much more than I would ever need and I was stuck paying the price for "stuff I would never use" so I did some serious searching for a provider that would allow me to manage my contacts, set up appointments, a calendar, reminders, and allow me to share this information with others in my office. LACRM totally fits the bill! Plus I can use it on my tablet, so my client... II

SHARON HERMAN SILVER KEY WEALTH MANAGEMENT

Less Annoying CRM helps us figure out which clients need to hear from us at any given time. As financial advisors, we don't just want to check in when a financial quarter report comes out. We want to know how their daughter's college graduation went or how they are recovering from that knee surgery. We care about our clients and their families, and Less Annoying CRM does an amazing job of helping us organize a lot of information about...

SHANNON ROZNER FINANCIAL-360 I have recently subscribed to LACRM and could not be happier. I am a little "Old School" and have some resistance to CRM's. LACRM has been a Godsend to me and my business because, for the first time, I have a CRM that I completely understand and can navigate. I am using almost all of the tools provided and understand them. Most of the CRM's I attempted to use in the past were entirely and unnecessarily too difficult for the... II

WILLIAM HAMMETT HAMMETT MARKETING GROUP







#### ABOUT METHOD:CRM



Method:CRM gives you a better way to run your business so nothing slips through the cracks and everyone can get more done. As a small business themselves, they've felt the pain of using out-of-the-box software that didn't adapt to their needs. And they know every small business has its own unique workflows. They believe you should have enterprise benefits at small business prices and that's why they built Method. Their award-winning software is fully customizable, so you can run your business your way.

43

#### TOTAL CUSTOMER REFERENCES

**VIEW ALL** REFERENCES

#### **FEATURED TESTIMONIALS**

| <ul> <li>I implemented Method for a sales team because I wanted something easy and intuitive for them to assign and manage opportunities, proposals, invoices, and payments. I didn't want sales reps in QuickBooks, so the integration was important — Method does that extremely well.</li> <li>JOSHUA SROGE CHIEF FINANCIAL OFFICER, FIRESTONE</li> </ul> | <ul> <li>Method has allowed us to put reminders on our schedules months down the road to check in with key decision-makers. Further, the integration with Mailchimp has allowed us to segment our customer list and export certain groups for timely email campaigns.</li> <li>JOHN CONNER BREAKING THE BARRIER</li> </ul> |
|--|--|
| Method has streamlined just about every process<br>that we have in our business, from writing orders<br>to sending POs and many other functions. The next<br>step is fully integrating all of our operations so<br>we're a well-oiled machine from start to finish! NICK ROBINSON<br>FUJI MATS   | <ul> <li>We have been using Method for years now, and it was one of the best decisions our business ever made. From the web to lead forms on our website to the final sale, Method makes sure that no lead ever falls through the cracks.</li> <li>JAMES SAUTEL MOUNTAIN VIEW WINDOW &amp; DOOR</li> </ul>                 |

#### **TRUSTED BY**

FinancesOnline

SKY PRODUCTS EQUIPMENT SOLUTIONS

ROOP











#### ABOUT NETHUNT



NetHunt CRM is a cloud-based customer relationship management tool that integrates with Gmail and enables businesses to manage interactions and records directly from the inbox. It generates leads via email, chat messages and social media. It provides all CRM updates through these platforms. NetHunt CRM blends entirely with Gmail, placing the full-featured CRM right next to your emails. Everything you need is now available in Gmail inbox: customer profiles, deals and opportunities, data filters and views, team collaboration, email tracking, bulk email campaigns, and much...

### 60

#### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

I NetHunt is for me the only possible CRM which you can choose if you use GSuite / GMail, because it's the only one which is really fully integrated and works. The support is perfect, hard to find somewhere a better one. It's affordable for the small company as well as for the big ones. It helped us very much in the daily business, to track sales, to link all important information / emails to one client, so it's very easy for us to do our work. The big benefit is that we can work with our base of clients and do a cross- / upselling; and not always we have to only get new clients, it helps to keep clients in service and for a long time.

#### OLIVER KEPLINGER MANAGING DIRECTOR, KEP CONSULT

When we found NetHunt CRM, I read about the system and decided to give it a try. By now, every single one of us is used to the system. I can control all of my contacts through NetHunt, see all the history of communication and related data. It is perfect.

FRANCO GAMBINI DIRECTOR OF OPERATIONS, UNIVERSAL GENETICS From the first day of testing NetHunt CRM, we loved how customisable it was. We created several funnels for different departments across the company and customised the stages and the fields within them to be different in each case. Not many CRM systems allow you to do that, so it was a pleasant surprise to have so much control over our folders, pipelines, and records. Now, the whole team can work in the same workspace without interfering with each other.

#### KYRYLO ALEKSIEIENKO BUSINESS ANALYST, HASKI

We were looking for a CRM that could integrate well with our email system and offer straightforward solutions to our lead management challenges. NetHunt CRM's ease of use and functionality made it the right choice for us.

MARYNA SOBOL CHIEF SALES OFFICER, 100SYSTEMS







#### ABOUT OPENCRM

opien crm

OpenCRM is fully featured CRM software based in the UK. We have 5 Star UK based support. It's easy to use and intuitive with a familiar interface and powerful features. We also offer a flexible and bespoke Consultancy, Coaching and Support service which can be tailored to suit your needs by our clever team of professionals. OpenCRM is a Customer Relationship Management (CRM) 'Cloud' solution. It's accessed through the web, all you need is an internet-connected device with a web browser (like the one you are using right now), making it a truly Anytime, Anywhere, Always ON...

# 56

TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

| <ul> <li>Having looked at a number of options we choose OpenCRM because of its simplicity and feature rich functionality. The system is easy to deploy and maintain. Critical to our decision was also that all data is held in the UK only.</li> <li>STEVE LEES BLUE SQUARE UTILITIES</li> </ul> | <ul> <li>We now have a CRM that is tailored to<br/>exactly what our organisation needs but<br/>at a reasonable price. On top of this,<br/>OpenCRM is easy to use, intuitive and the<br/>customer support team is always<br/>available to help.</li> <li>LAURENCE GEORGIN<br/>UNIVERSITY OF SOUTHAMPTON</li> </ul> |
|---|---|
| <ul> <li>We're really loving using the OC (as it's fondly named here) as our new CRM, it's working really well for tracking jobs, enquiries and invoicing.</li> <li>ANNA ESSLEMONT THE MANAGEMENT CENTRE</li> </ul>   | <ul> <li>One key factor of OpenCRM was having<br/>the ability to pull and push data between<br/>OpenCRM and other applications.</li> <li>RICHARD CAMPAGNA<br/>55/REDEFINED</li> </ul>   |







#### ABOUT PROSPECTSOFT



ProspectSoft is perfect for businesses who sell physical products from stock B2B. As the official "Stock-Aware CRM", Prospect offers unparalleled integration framework to almost any ERP/accounting system and native integration to the leading back-office accounting systems and inventory management systems, including Unleashed and Xero, Access Dimensions, Exchequer, Pegasus Opera, Sage 50, and SAP.

# 64

#### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

Ease of use, quick, SO user friendly and adaptable, and as a HOD the best thing was it was easy for my team to pick up and work effectively on within a week. Win for us! Customer satisfaction - this is now so measurable as we have a more direct link to our customers and a clearer view of orders and relationships. Another win! Support every single call to their centre is answered professionally and swiftly and this makes a truly immeasurable difference in a busy centre like ourselves. So glad we found you.

#### ANDY GRANNELL THE PATCHWORK TRADITIONAL FOOD

The Prospect staff were very accomodating and the training was helpful and gave user confidence. I would recommend this product to anyone looking to introduce a CRM system.

DAVID ABBOTT GENERAL MANAGER, BALTEC We've been using Prospect CRM for a few months - it works brilliantly with Xero (as well as other apps) - the hookup was quick and easy, and we're already reaping the benefits. The team at Prospect are quick, polite, friendly, knowledgeable and they took the time to understand our business during the onboarding process. Massively recommend!

CHRIS HOLLOWAY NEIGHBOURHOOD COFFEE ROASTERS

I The CRM itself is outstanding - it's very intuitive and we wouldn't hesitate to recommend it to other businesses.

MALCOLM AVISON MANAGING DIRECTOR, VANTAGE HOUSE







#### ABOUT SOFFRONT SOFTWARE

# SOFFRONT

Soffront Software was founded in 1992, a pioneer in the CRM software industry, delivering one of the first cloud CRM solutions in the industry. They launched their first customer service software in 1993, an innovation at the time when CRM was not known. Soffront continued to evolve in the early 2000's, introducing one of the first cloud CRM solutions in the market and developed a fully automated CRM solution for sales marketing, and customer service, help desk and project management that has gone on to win several industry awards.

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#### TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

Soffront Online CRM saves me a lot of time. I work with multiple customer records simultaneously, review my pending activities and drill down to the details in one click. Prospecting is very efficient and it is easy to manage my pipeline. I capture leads from the website and snap business cards directly into the CRM. I use Soffront's built-in email and social marketing to nurture and qualify my leads. Soffront is affordable and I can use my mobile phone or computer to use the CRM. I recommend anyone in business to use Soffront.

#### MARK PORTER OWNER, EXPRESS EMPLOYMENT PROFESSIONALS

Soffront CRM allows us to improve in numerous areas. We can now better manage our sales cycle, produce superior sales reports, and more thoroughly track and report on congressionally mandated outreach requirements.

WAYNE GARDELLA VP, EXPORT-IMPORT BANK OF THE UNITED STATES Soffront CRM is priced within our budget and is extremely flexible. It provides us with all of the benefits of a standard software package, combined with the flexibility needed to implement all necessary customizations and specifications.

MARTIN KUNZ CHIEF TECHNOLOGY OFFICER, EUROFINS MWG OPERON US

Soffront Online CRM Tool's highly competitive pricing and advanced customization features made it an easy decision for our company to abandon SalesForce.com.

ADAM JOHANNINGMEIER IT ADMINISTRATOR, MERCHANTSERVICE.COM

















# ABOUT WORKBOOKS

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Workbooks extends beyond sales, marketing and customer support to include order management and fulfilment, invoicing and supplier management. Workbooks joins up the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the...

# **14.5** TOTAL CUSTOMER REFERENCES

#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

We chose Workbooks as it was able to provide the CRM best suited to our needs – and we're very glad we did. It's a highly customisable product and the Workbooks team provide excellent support when it's required. It's made a real difference to our sales and marketing, and our reporting. It has generated significant revenue and enabled us to run our business more efficiently.

CHARLOTTE WEST XPS PENSIONS

Workbooks CRM gives us the ability to see all of our customers and prospects in one place. Because we have multiple brands that work in different streams, events or paid content or subscriptions, we now have visibility of everyone in CRM and each department can actually make full use of the data.

MATTHEW MORTIMER SENIOR LEAD GENERATION MANAGER, LAW BUSINESS RESEARCH We learned that, just like any other software product, you can use Workbooks as a basic tool or you can really make it work for you, customising it to suit your needs - that's what the administrator training enabled us to do. We emerged with a much better understanding of what it was capable of and as a result we've made some significant improvements.

DARREN ROBERTS COMMERCIAL MANAGER, HARDSCAPE

Workbooks provided a CRM solution that spared us building something from the ground up, but that's sufficiently bespoke to meet our unique and challenging requirements – exactly what we'd been looking for but hadn't found elsewhere. They've been with us every step of the way in implementing it, too.

ROB QUAYLE CHIEF EXECUTIVE OFFICER, DIRECT LIFE







#### ABOUT WORKETC



With integrated CRM, projects, billing, help desk, reporting and collaboration, WORKetc is the all-in-one cloud-based software solution to manage your growing business. WORKetc gives users complete control over the data they enter and the data they want to see. Custom fields, projects, and workflow keep the system customizable and adaptable to handle its users' evolving needs. It grows alongside your company, letting you do what you want and how you want it done. The system goes beyond what the average CRM can do by letting you manage and track all...

# 52



#### VIEW ALL REFERENCES

#### **FEATURED TESTIMONIALS**

| <ul> <li>WORK[etc] allowed us to monitor current customer<br/>activity in order to be proactive to customer issues<br/>which resulted in high adoption and positive<br/>reviews. These reviews and high adoption ensured<br/>our client was more than happy to give us more of<br/>their business.</li> <li>CORY MAYER<br/>TIRE WIZARD</li> </ul> | <ul> <li>WORKetc lets us track how much time our staff are taking on every single activity. This also allows us to set targets for things such as billable hours. Since bringing timesheets into action, our billable hours have risen over 20% across the board.</li> <li>DAVID TOWERS ECO COMMUNICATIONS</li> </ul> |
|---|---|
| WORK[etc] helped us keep everything in one place<br>and allowed us to look bigger and more<br>professional through the use of a client login on<br>our homepage and that resulted in increased sales.<br>I've finally been able to buy a new car! SCOTT MOORE<br>PRESIDENT, MOORE ENGINEERING SERVICES  | <ul> <li>Having an all in one solution has paid for itself over<br/>and over with successful attributes found nowhere<br/>else. It's dancing with your clients made easy!</li> <li>JASON ROYALS<br/>RELEASE 2 LLC</li> </ul>  |

