If you’re running a business, you’ve most likely come across the acronym CRM, which means customer relationship management. The term, first coined in the 1990s, simply means managing customer relations. Today, CRM is used to describe client management systems & software, the IT systems used to manage this relationship.

Client 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.
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** is affected by:
1. Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
2. Customer reference rating score
3. Year-over-year change in amount of customer references on FeaturedCustomers platform
4. Total # of profile views on FeaturedCustomers platform
5. Total # of customer reference views on FeaturedCustomers platform

**Market Presence Score** is affected by:
1. Social media followers including LinkedIn, Twitter, & Facebook
2. Vendor momentum based on web traffic and search trends
3. Organic SEO key term rankings
4. Company presence including # of press mentions

**Company Score** is affected by:
1. Total # of employees (based on social media and public resources)
2. Year-over-year change in # of employees over past 12 months
3. Glassdoor ranking
4. Venture capital raised

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### Customer Success Report Award Levels

**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.
2020 Customer Success Awards

Check out this list of the highest rated CRM Software software based on the FeaturedCustomers Customer Success Report.
OVERALL BEST
OF CRM SOFTWARE

BEST IN CATEGORY

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 to their customers in a whole new way using the latest innovations in mobile, social, and cloud technology to connect with their customers like never before.

“Salesforce isn’t just a great product, it’s a best in class SaaS organisation we can learn from. The forecasting app is helping us to make manager and sales rep conversations more proactive. We can now loop in support earlier to ensure deals have the best chance of progressing, and focus our energy in the right places.”

Rowan Bailey
Head of Revenue Operations, Peakon

“Salesforce helps us collaborate and streamline communication internally so we can be more efficient. It enables us to capture customer feedback in a way that can improve our business and satisfy our customers.”

Jeff Hines
Vice President, Global Retention Marketing, Rosetta Stone

“With Salesforce, we can see the entire lifecycle of our customer from first marketing contact, through the sales process and on to our everyday customer service interactions. Solving delivery problems for our customers is at the heart of our business more than ever.”

Rosie Bailey
Business Development Director, CitySprint

“With Salesforce, we don’t just get that view, we also get a wealth of insightful reports, real-time analytics, and personalized dashboards.”

Tarek Alexander
Head of CRM, Victor
2020 MARKET LEADERS

- act!
- Oracle NetSuite
- Copper
- Pipedrive
- Freshsales
- Pipeliner
- HubSpot
- SugarCRM
- Keap
- ZohoCRM
- Microsoft Dynamics
ABOUT ACT! CRM

Act! has one purpose — to fuel business growth. We do so by delivering modern and innovative software and services, purpose-built for the unique needs of today's small and midsized businesses. When you choose Act! Growth Suite, you get proven CRM and powerful Marketing Automation in one—the ultimate toolset to build relationships, maximize engagement, and drive business growth. You also get peace of mind that you're making the right decision, because Act! is recognized as a leader with millions of users worldwide.

"With Act! CRM everything to do with the sales process, from customer management to the signing of contracts, is connected."

Arno Bekkers
Managing Director, TSD Groep

“We chose Act! in the first place because we wanted a CRM that would help us to better understand, track and qualify our prospects and clients, but without having to wade through all of the non-essential features."

Brian Pashkoff
Managing Principal, MGA, Inc.

"Having Act! with all that information at your fingertips, a calendar with who you’re supposed to call, when you’re supposed to call, what the conversations were before, what equipment they have for us is huge."

Greg Sprunk
Superior Cleaning Equipment, Inc.

"The quality of our marketing has improved significantly, so rather than being bombarded with blanket offers, customers now receive advertising opportunities that are tailored to their needs. Customised reporting helps us measure the success of our marketing, and we can make adjustments accordingly. Act! is a win-win for both customers and staff!"

Nora Hoppe
Data Manager, Advertising Department, Die Zeit

130
Customer references from happy Act! CRM users

VIEW ALL REFERENCES
Copper is the CRM that works for you. The #1 CRM recommended by Google, it’s the leading CRM for G Suite. Copper puts the productivity of its users first by providing a seamless integration with G Suite, a beautiful user experience, and by helping teams and businesses build long-lasting relationships. Copper services more than 12,000 paid businesses in more than 100 countries. Headquartered in San Francisco, the company has raised $87M in venture capital financing from leading investors like GV, NextWorld Capital, Norwest Ventures and True Ventures.

Customer references from happy Copper users

“It seamlessly integrates with Google Apps, including a well organized Chrome extension, and it’s fast on browser and mobile. We’re very happy we switched to ProsperWorks and haven’t looked back!”

Dan Holowack
CEO, CrowdRiff

“I’m able to keep up with all the projects throughout the team and see any notes others made or emails they sent. I can refer to those notes without have to search through email because they’re all stored in ProsperWorks. It’s a quick way to stay connected when I’m on the road.”

Marianne Delionado
VP of Sales, Healthcare

“Thanks to Copper, we can easily find and look back at email conversations, each other’s notes, and even create custom fields for questions asked to make sure we’re getting a full picture of the candidate.”

Caroline Yeager
Associate, IrishAngels

“We use Copper for everything. It keeps track of our conversations, and we can update them on the go. We also use it in managing a variety of jobs.”

David Stober
Chief Executive Officer, Guided
ABOUT FRESHSALES

Freshsales is a sales CRM designed for high-growth, high-velocity sales teams with features such as built-in phone and email, lead scoring, user behavior tracking and automation, along with other CRM-related features on one platform. Freshsales is a part of the Freshworks product family, whose flagship product, Freshdesk, is the leading customer support solution with over 100,000 customers worldwide.

"Sales Campaigns is perfect for inbound and outbound sales emails. We have the flexibility to choose between Classic or Smart campaigns. With Sales Campaigns, and website and in-app tracking integrated, Freshsales doubles as a powerful CRM and marketing software."

Juan Quirós Carmona
Chief Executive Officer, Crowdence

"The interface is very simple and minimalistic. It’s easy to set up and the training for the sales team is very short. The interface allows easy monitoring of your day-to-day sales activities and sales funnel management."

Sreeraj Das
Quotient

"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."

Brian Engles
Director of Partnerships, Facilitron

"The new Freshsales Web Forms allowed us to quickly implement contact forms for our new website with no API programming. This is a valuable new feature."

Lance A. Simon
Chief Executive Officer, iCohere
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 application, enables sales and service teams to have more effective conversations with leads, prospects, and customers.

“With HubSpot, our marketing team can finally see where our website visitors are located, which marks they are leaving on our website, which data we were able to generate through forms, as well as see the scoring details of each lead.”

Marius Janssen
Head of Marketing, Jedox

“HubSpot is the perfect blend of power and simplicity! We are using the Enterprise Edition, as well as Sidekick and CRM to run both Sales and Marketing, and we are getting fantastic results with almost no seed for support. Since implementing HubSpot, we have significantly increased our conversion of site visitors to contacts and ultimately to...”

Matthew Brogie
Chief Operating Officer, Repsly

“I picked it up straight away, and I like how it amplifies everything I do, from email campaigns to blog posts. I’ve recently started using the Content Strategy Tool, which allows me to determine which topics our personas care most about and then create content clusters around them. That translates into higher search engine rankings and more engaged leads.”

Carla Almeda
Content Manager, Talent Clue

“We’ve used the HubSpot CRM since day one, and it really makes it easier to have more intelligent conversations with prospective clients. We’ve closed deals because of all of the wonderful features that the platform has – we are continually evangelising about them.”

Mikko Seppä
Founder, Advance B2B
ABOUT KEAP

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.

“"In my mind, data is king, but before Keap, we didn't have a specific way to consolidate and track it. Now, we have data at our fingertips and [we] can use it to make important decisions hiring, firing, pricing and messaging.””

Meny Hoffman
Co-Founder, Ptex

“"Without Keap, I don't think we could have effectively nurtured our prospects or our existing client base. With Keap, we've been able to do just that with tracking, reporting and measurable results.””

Ken Chandler
Vice President of Operations, Presidential Pools

“"My favorite feature is that I have a dedicated work phone number. I have the ability to take notes and set reminders after any communication I have with my clients and have it all in one place!””

Bobbi Jo
Owner, Light Align Holistic Wellness

“"When I saw Keap, I was only looking for an email program; but when I saw some of the CRM capabilities, tasks and completion scenarios, and follow-up sequences, I realized I could utilize it to manage my employees and their workloads.””

Damian Sanchez
Founder, DC Mosquito Squad
ABOUT MICROSOFT DYNAMICS

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.

1165
Customer references from happy Microsoft Dynamics users

“Microsoft Dynamics CRM is a solution that is simple, easy to use, implement and maintain. It helps automate and simplify client relationship management processes. It provides employees the access to up-to-date data and enables them to respond quickly to changing information.”
Bartłomiej Jędrzejczyk
CIO, Promedica24

“From a technical standpoint, Microsoft Dynamics 365 was attractive because as a .NET shop, we already have experience with Microsoft solutions. We also appreciated the scalability and customizability of the solution. Furthermore, we envisioned a single CRM tool—not just for sales, but for also marketing and maybe even customer service. Microsoft...
Jim Hicks
Director of Global IT Applications, Sage Publishing

“With Dynamics CRM Online, we can quickly add a field for new requirements to ensure that people in the system only see what they need to. This control over information visibility is resulting in huge efficiencies across the business.”
Graham Roddan
Product Development Manager, Effective Energy

“Microsoft cloud solutions offer a ton of breadth. They span accounts, sales opportunities, marketing initiatives, social channels, telephony, email—all the ways that we engage with our past, present, and prospective fans.”
Adrian Hanauer
Majority Owner, Seattle Sounders FC
ABOUT ORACLE NETSUITE

Oracle NetSuite pioneered the Cloud Computing revolution in 1998, establishing the world’s first company dedicated to delivering business applications over the internet. Today, it provides a suite of cloud-based financials / Enterprise Resource Planning (ERP), HR and omnichannel commerce software that runs the business of companies in more than 100 countries.

"NetSuite gives us a single view of the customer, rather than having customer data all over the place. We have strengthened customer support and customer relations, and we’ve been able to speed up order processing while improving system availability at the same time."

Carl Cox
VP of Operations / CFO, Lightspeed Technologies

"NetSuite is a great platform for high-growth companies. Having all our information on sales, inventory, orders, fulfillment and customers on one platform has been extremely valuable."

Revant Optics

"The entire business is built on NetSuite, and our ability to access real-time financial, inventory and customer information has been a big part of our growth. Aminian Business Services has done an amazing job—they really understand our business and serve as a partner to ensure we get the most from NetSuite."

All Safe Pool Safety Products

"NetSuite is an interactive system; it provides me with the real-time information I need at anytime, and generates activity reports from a financial and commercial level."

Marie-Agnes Mourot de Lathyle
Chief Finance and Operations Officer, Esomar

1241
Customer references from happy Oracle NetSuite users

VIEW ALL REFERENCES
ABOUT PIPEDRIVE
Founded in 2010, Pipedrive is the first CRM platform developed from the salesperson’s point-of-view. Inspired by proven methods of experienced sales people, Pipedrive engineers developed a platform that helps salespeople and teams focus on learning and repeating their most effective process to close deals. By bringing together tools and data, the platform focuses sales professionals on fundamentals to advance deals through their pipelines. Pipedrive helps to provide management and sales teams with more timely, detailed, and accurate sales reporting and revenue projections. Our goal at Pipedrive is to make sales success inevitable - for individual sales people and teams.

145
Customer references from happy Pipedrive users

“As a manager, I can track everything at the company level, but also at the individual level. I can get data in real time and I’m able to give feedback instantaneously. I live in my Pipedrive dashboard, and it’s one of the few tabs that is open in my browser every single day.”
Lisa Coyle
Owner & CFO, 360 Payments

“I love it to be honest. It integrates with my company email and calendar. The app works offline and reminds me of actions and activities. I can build whatever pipelines I want, I can track on percentage, last action, value - you name it!”
Andrew Mcivor
Enterprise Mobility Consultant, TheAppBuilder Ltd

“Pipedrive helps us keep properly structured and complete records of our clients and deals and all the related information. We can access this information easily, anywhere and anytime using their web and mobile applications.”
Eirini Vrachnou
Marketing & Communications Manager, AGT Engineering

“We especially like the instantaneous communication between team members, and look forward to seeing where Pipedrive can take us. Our biggest achievement is being able to actively and accurately track the number of sales each month with the new visibility we’ve gained.”
Radu Bobirnac
Marketing Manager, Northwest Weatherization
ABOUT PIPELINDER CRM

Pipeliner CRM drives exceptional user engagement through its sales-friendly interface. With its uniform navigation and visual approach, users can learn the system quickly, which drives high adoption rates and faster ROI. Plus, users can easily customize what they see to make the system their own. Pipeliner’s administration backend is also visual and easy to use with drag ‘n drop, in-line editing and other non-technical tools. A key differentiator is that Pipeliner does not require a full-time admin or expensive certified technical resources. There is also a very powerful reporting engine built into the product, which allows reports to be generated from any view or area within the system. There are multiple types of reports available from standard to pivot to advanced and graphical dashboards. At Pipeliner, there is a strong belief in focusing on core competencies, which is why Pipeliner delivers the best in sales force automation and then provides an easy and seamless way for customers to integrate with other best of breed systems like Ticketing or Marketing Automation or any other system a customer may be using. Pipeliner also provides many “Automation Add-ins” that automate routine tasks that would require manual intervention in other systems. Pipeliner also has a built-in automation engine called the Automatizer that can automate many tasks within the CRM. The Pipeliner Mobile CRM App is the most advanced on the market and the only one with the built-in Artificial Intelligence engine, Voyager. With location and mapping features, voice to text, business card scanning and more, the mobile app enables real efficiency on the go.

Customer references from happy Pipeliner CRM users

“I’ve been leading and managing industrial salesforces for a long time, and I’ve used a lot of different software packages, including Sugar, Salesforce, Goldmine, Lotus Notes and many others. I would say Pipeliner is by far the best one I’ve used—a perfect mix of functionality and ease of use. I give Pipeliner a ten out of ten.”
Howard Lind
President and CEO, Cicoil

“Pipeliner’s Bubble Chart View is incredible. Our projects tend to have a very long sales cycle. For example, just yesterday we finally got the order for a project we started working on back in 2011. With the Bubble Chart View, I can look at stage versus time, and tell if it’s been in there too long, or even if it’s been too short a time to be advanced. We…”
Imran Jaferey
VP Global Sales, Headworks International

“At the beginning of 2016 we made a goal to increase sales by 20 percent, which is a large increase for our business. As of December 1st we are at 95 percent of that lofty goal with 31 days left to go. We really owe it to Pipeliner for helping us get to where we are now.”
Luke Wittenbraker
Sales and Marketing Director, Mactech On-Site

You will not be disappointed if you choose Pipeliner as your CRM. Our organization was faced with a challenge after we made three acquisitions in two years which meant the organization was now scaling at 18 times the industry average growth. We needed to get more predictability in the sales channel.

Preston Herrin
Chief Commercial Officer, Drummond
ABOUT SUGARCRM

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.

342
Customer references from happy SugarCRM users

“With Sugar, we can see the last time a customer was contacted and the nature of the contact: call, email, meeting, etc. It’s updated constantly, and ensures that we’re efficient and don’t leave any of our customers behind.”

Brad Payne
Client Services Administrator, Hilldrup

“With the help of Sugar Professional we are gaining insight into having potential customer data and support data in one place and are able to attract many new customers!”

Jan Jůza
Business Development Manager, CCA Group

“With Sugar, we have an easier way to collect and report data from sales activity and a better integration between sales and the other departments.”

Oscar Sánchez
Sales Operation and Support Director, Bitdefender

“With Sugar, we now have effective organization, management, and monitoring of all sales related activity. It has improved the efficiency of the team, accelerated client response time, reduced the time required to locate client information, and given us more quality time for sales.”

Dimitris Melexopoulos
Brokers & Non Tied Agents Manager, Generali Hellas
ABOUT ZOHO CRM

Zoho CRM is an On-demand Customer Relationship Management (CRM) software for managing your customer relations in an efficient manner. It is efficient because Zoho CRM helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system. Be it multi-channel communication, sales productivity, CRM insights, product customization, or third-party integration, Zoho CRM offers a host of features to support the requirements of small businesses as well as large enterprises.

"After implementing Zoho CRM we are able to monitor what’s going on with each client at each stage of the sales cycle.”

Luis Gardolinski
CEO, Startrade

"From using spreadsheets to Zoho CRM, we have managed to capture data in a more versatile way and has also minimized our sales cycle. It gives us more visibility of how our business is moving and makes us much more efficient.”

Sreeparna Roy
Manager - Business Marketing & Strategy, Chai Point

"I had previous experience using Zoho Apps so I knew that Zoho CRM Plus was just what we needed. With Zoho CRM Plus, you can build your strategy and track your entire marketing efforts and sales pipeline and easily automate several tasks. I insisted on implementing Zoho CRM Plus because I knew how much time we would save and how much more..."

Melissa Rogozinski
Systems East, Inc.

"As a CRM manager, I can plug myself in directly to the sales team and make sure they never slip out of deals, with the help of working tips provided by Zia. Also, the Zoho CRM mobile app helped me analyse my sales rep’s occupancy data, with options like Check-in, which is a very advantageous tool for any organization. In addition, Zoho Support is..."

Divya Sundaraju
CRM Manager, FundsIndia
2020 TOP PERFORMERS

- Agile CRM
- CoSential
- Sage CRM
- Soffront
- Insightly
- thryv
- Maximizer CRM
- Workbooks.com
- Nimble
- Nutshell
- Zendesk Sell
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.

"In short, this is the best CRM platform I’ve ever used. Between the tagging system, workflow engine and API, this system has the ability to do marketing automation better than any other system I’ve worked with. The timeline makes it intuitive to keep track of customer contact points. The integration with IP phone systems means that costs are kept low. I have..."

Ben Inkster
Bowtie Websites

"I’m really impressed with the way Agile CRM works. I LOVE the contact timeline!!! This is a killer feature. It means that in one place anyone on the team can see all the communications with a contact, even if an email was sent (IMAP) from outlook or web mail."

Brenton O’Brien
Managing Director, Microbric

"Working with Agile CRM is a pleasure. In our line of work (gaming), being able to manage and organize a lot of data for many players can be cumbersome and a hassle. Agile CRM not only makes it easy, but also a pleasure. Right away, our customers have noticed the more personal approach we’ve been able to take and our leads are converting like mad!"

Andrew Shaker
Founder & CEO, Villabet

"Agile CRM automatically tracks users in customer lifecycle and sends emails to our customers. The funnel, growth and cohorts metrics are our lifeline. Highly recommended."

Dinesh
Growth Hacker, ClickDesk
ABOUT COSENTIAL

Cosential has been providing comprehensive CRM and proposal automation solutions for some of the world’s largest Architecture, Engineering, and Construction (A/E/C) firms. Unlike any other solution, Cosential was built by A/E/C marketing professionals with a deep understanding of your unique pain points and business processes. From key features to implementation and support, Cosential is tailored to A/E/C best practices in every way.

"Using Viewpoint and Cosential together has allowed us to streamline our submittal process and ensure consistency. We’re thrilled to be a part of the ongoing collaboration and development discussions to enhance the existing integration.”

Anna Harrison
Marketing Manager, Yates Construction

“Having this integrated solution is so valuable. It saves me and my colleagues hours every week and removes the inefficiency of double-data entry.”

Courtney Kearny
CRM Manager, Hill & Wilkinson

"Cosential has streamlined our proposal process [and] made it much more efficient. I love the publisher module - we can produce profiles, project lists and resumes quickly and know that the information is accurate and consistent.”

Farrah Mote
Marketing Manager, Robins & Morton

"My favorite part of Cosential is the dashboard widgets and reporting. 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.”

Anthony Russ
Resource Coordinator, Consigli Construction
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 AI-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.

"We really like the ease with which FreeAgent can be customized to our sales process. Also, the direct integration with our Outlook inboxes is a nice feature."

Kyle Edington
Onpoint Real Estate Solutions

"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."

Judd Whiteman
Chicago Title

"I actually felt more organized in 15 minutes - just by going through the very smart setup screens. You don’t need a bunch of training to use it. Put your contacts in and you will be productive almost immediately. I’m also impressed with the email capabilities, especially the open and click tracking analytics. It is easier than you think, and way easier than...

Jeffrey Pease
Chief Executive Officer, Message Mechanics

"Perfect solution for me. Wonderful to work with. Easy to use, can sync my email and phone, keeps track of customers, activity, pipeline and next steps. It is a great solution and very inexpensive."

Rich Van Loan
Sales Consultant, Custom Window Decorators
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.

“Insightly has given us a holistic view of sales and marketing activity and helped us connect our sales and marketing teams. The email integration allows us to respond to leads much faster than before and we can track leads all the way through the sales funnel.”
Bob Samii
Founder, InMotion Real Estate Media

“G Suite integration was an important feature for us. Insightly automatically synchronizes our email conversations, calendars, and documents and significantly reduces administrative work.”
Brian Tessier
Commercial Call Center Manager, Discount Car and Truck Rentals

“Dashboards keep users informed about the status of each deal. We’re able to visualize new business written, opportunities still in the pipeline, and the value of each pipeline stage.”
John Fleury
President, Fleury Risk Management

“Because Insightly is accessible on the web, via mobile apps and through Gmail, I can always stay up-to-date with my clients. Plus, the interface is pretty, and to me, that makes it more intuitive and easier to use.”
Micki McNie
Real Estate Broker, GreenSpot
ABOUT MAXIMIZER

Maximizer 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.

“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.”

Jagat Pandya
Agency Manager, Slate Personnel

“Automatic subscription renewal reminders take a great weight offour team, because a major strength of Maximizer CRM is that it will never let a subscription lapse without alerting us and the customer.”

John Jose
Circulations Director, Sport360

“We track every interaction with our clients and prospects through Maximizer. Without having a system like Maximizer to assist us, we would have no way to make sure things didn't fall through the cracks. It allows us to give better quality attention to clients and to streamline our customer service processes.”

Troy Wruck
Director of Sales and Marketing, Profit Systems Inc

“The business partner portal is a very attractive feature for our brokers. They love the fact that they can simply login and access each client's complete history, make changes, track the services we have provided - it helps them build their own businesses and relationships with clients.”

Kevin J. Timmerman
President, Steele Capital Management Inc
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 the eighth consecutive time and users’ choice award winner by Fit Small Business. Nimble combines the strengths of traditional CRM, classic contact management, social media, sales intelligence, and marketing automation into one powerful relationship management platform that delivers valuable relationship insights everywhere you work.

“We have evolved from using Nimble as a database to taking advantage of it as a way to measure engagement and interaction, as well as a way to move people through a pipeline. I’m very excited to see the influencer program continue to progress in Nimble so that it’s easy and efficient for us to achieve our goals.”

Heather Dopson
Community Builder, GoDaddy

“I use Nimble as much as I use Gmail. It is a huge part of my work day. With Nimble, I have been able to cut my workflow time in half; it allows for more productivity and time to connect with prospects. The UX/UI improved drastically, allowing us to continue adding information like notes without having to launch the main app. The new Nimble Prospector has…

Nicole Ponce
Influencer Manager, Semrush

“When searching for a small business CRM, it became evident really quickly that Nimble is unlike other products on the market. It’s simple and intelligent. The ease of use, along with robust data enrichment and integration with Office 365 sealed the deal for me. With Nimble, we receive a level of service we’ve never experienced before. Nimble’s support…

Eric Brown
Founder & Chief Executive Officer, Fulfilltopia

“Nimble is a powerful way to tie together social and other channels in a flexible platform to manage relationships, store contact details, and track information in a manner that’s easy to retrieve. Nimble is a perfect fit for us and a pivotal part of our growth strategy.”

Kevin Masi
Founder, Torque
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 consumer-level design polish with business-scale utility. In a nutshell, they help businesses grow.

"Nutshell is the best value for the money. The versatility and functionality make it a very easy and powerful product to use."
Mark M.
Sales Manager, Southwestern Scale Co.

"With Nutshell we have been able to better track our contacts, emails, and quotes, and save our employees hours of repetitive data entry!"
Clinton A.
Chief Operating Officer, Fuel Cells Etc

"Nutshell allows me to send bulk and personal emails that are received by the recipient as individual emails—so it’s not going to end up in their spam folder—and then it also gives me some nice visibility on whose opened it and who hasn’t. I can tailor my follow-ups based on just having that intelligence."
Bennett Moe
Director of Business Development and Contributing Editor, The CyberWire

"The greatest benefit is tracking your leads and where they come from. It’s been very beneficial to tag each lead and look at them on the map view to evaluate our marketing efforts."
April M.
Territory Sales Representative, Lira Clinical
ABOUT PIPELINEDEALS

Founded in 2006, PipelineDeals is the most adopted CRM for small and midsize businesses, empowering sales teams across a breadth of industries to build game changing relationships. PipelineDeals 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 PipelineDeals to gain visibility into their sales pipeline to accelerate opportunities and close more deals. Headquartered in Seattle, WA, PipelineDeals has made the annual Inc. 5000 list since 2014, recognized as one of the fastest growing companies in the U.S.

"If we are going to start a website, I have a trigger and automation to let my website department know we are creating one. I can create triggers and automations to allow another team to start executing that project without having to call or make appointments. It’s all automated—which is something I value about PipelineDeals.”  
Chireece Noonan  
Customer Service Manager, iLocal Gurus

"With PipelineDeals, 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 Flooring

"We’ve been using PipelineDeals for well over a year now and have found it to be a simple yet highly effective tool for managing our sales process. It’s an ideal CRM for service-based businesses that focus on fixed-cost ‘deals’ and low volume transaction-to-client sales ratios.”  
Ross Beyeler  
Founder, Growth Spark

"We needed a cost-effective CRM solution with a straightforward feature set and highly intuitive interface that allowed a fast implementation and instant adoption by our team. The customer support is very responsive and we were able to load our existing data quickly, without the need for outside system implementation consultants.”  
William Mak  
Chief Financial Officer, Rethink Autism
ABOUT 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.

"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

"Thanks to the Sage CRM statistics and reporting features, we follow our sales, sales proposals, business won or lost and the reasons for these losses very precisely."

Lionel Semhoun
Training Manager, Yad Informatique Society

"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

"It has enabled us to speed up our procedures. We can also send emails directly using our CRM. With this solution, we have also improved the relevance of our marketing campaigns, which are now better targeted according to clients expectations and profiles."

Loïc Mechinaud
Marketing Manager, HTDS
ABOUT SOFFFRONT SOFTWARE

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.

“Using Soffront, we found a solution that allowed us to access accurate information quickly. We also enhanced our internal communications and automated bug tracking and help desk tickets.”
Francesco Mollisi
Senior Consultant, THEMA Consulting

“We selected Soffront because the product is intuitive and flexible. We can do all the custom work that needs to be done. After looking at all of the other products, we determined that Soffront represented the best value and functionality.”
Brent Taylor
Vice President of Operations, StoneEagle Group

“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 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…
Mark Porter
Owner, Express Employment Professionals

56
Customer references from happy Soffront Software users
VIEW ALL REFERENCES
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 productivity.

"Schedule planning, meeting reports, e-mails, overviews: everything is linked and can be found and accessed easily.”

Jan Baijou
Director, Friesland Lease

"Visit reports, e-mail messages, telephone, sales opportunities, turnover, quotations, diary management and reports are all easily accessible and transparent.”

Ronald Eikenaar
General Director, Sepawand

"With SuperOffice we can quickly find and add information and receive clear overview of activities, documents and project members related to projects.”

Siim Kauge
Project Manager, Boomerang Distribution

"The dashboard displays for each user save hours of number-crunching. Calculations of costs, margins, pipelines and much more are displayed in graphics. At a higher level, our Manager’s dashboards give an overall view of business performance based on real-time information, so the accuracy of their decision-making has improved in line with the..."

Andy Roberts
Director, Total ID

158
Customer references from happy SuperOffice users

VIEW ALL REFERENCES
ABOUT THRYV
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.

“With Thryv everything is in one place. It has helped us streamline everything from setting appointments and communicating with our clients to sending out invoices for our payments and allowing our clients to make payments.”
Matt Whitson
Owner, At Whits End Dog Training

“Client’s don’t need to call and ask me what my schedule looks like. They can simply log into our Client Portal, pick a time that works for them, and book it. Every day, I come into the office, and I can immediately see what appointments I have, who has a question I need to answer, or who has a bill due. It’s fantastic.”
Robert Ruggerio
Owner, Navigate Financial Aid

“I’m able to go right to the Client Portal from my Thryv app, and text a client with any information about their service or appointment. Thryv helps our clients feel like they have access to us 24/7!”
Daiquiri Rankin
The Beauty Mark Medical Spa

“Using Thryv has really helped me expand my business and build new clientele. It’s so easy to use and allows me to reach all of my clients and even prospective clients at a touch of a button.”
Natalia Martin
Art of Riding

94 Customer references from happy Thryv users
VIEW ALL REFERENCES
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 competition.

“Workbooks has significantly reduced the time it takes to invoice our customers. There’s no duplication of effort and having the order data in the same system as the invoicing data has been a real bonus for us.”

Rachel Stanhope
Finance Director, Caspian Media

“We were pleased to find a system that could integrate with Outlook. Workbooks enables us to keep a record of all the emails that have been sent to exhibitors and trade show attendees. Anyone in the team can track the emails that have been sent to a particular contact, even if they were not responsible for the initial email communication.”

Brett Kolinek
Director of Corporate Operations, Helen Brett Enterprises

“Workbooks has also reduced the scope for human error. The Workbooks fields and forms minimise the risk of errors being made and the powerful reporting tools make it easy for us to quickly identify and rectify them when they do occur.”

Theresa Quinn
Marketing Manager, Datalex

“One thing that we really like about Workbooks is that there is a regular set of updates. It is very reassuring as a user to see that the product is constantly being developed and new features or functionality is being added on a regular basis.”

Kevin Jones
Sales Manager, CSols Ltd
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.

“An API is often described as a connector. But for us the Sell API allows us to better help our customers by letting us achieve a true two-way sync with their data. Thanks to the Sell API we’ve made genuine progress in creating a product that actually communicates with user data instead of simply connecting to it.”

Matt Doyle
Chief Executive Officer, Launchcloud

“Rather than focusing on leads that have a low chance of success, Sell enables our reps to hone in on the most successful advertisers and grow our relationships with those partners.”

Kyle Evangelista
VP of Sales, Guerrero Howe

“We are using Zendesk Sell and Support to make it easier for the entire organization to surface and act on relevant information. By giving our sales and support teams everything they need in one platform, they are able to effectively and efficiently collaborate and improve the customer experience.”

Simon Rodriguez
Senior Vice President and Chief Digital Officer, Staples Canada

“Not only does Sell’s email integration allow us to automatically monitor email sends and outcomes, but it also saves us time by enabling us to send and personalize emails in bulk.”

John Ericson
Sales and Marketing Coordinator, Advent
RISING STARS
Avidian Technologies develops Prophet CRM, a customer relationship management (CRM) software for businesses who desire the simplicity and elegance of Outlook and need a CRM solution. Avidian is a private, employee owned enterprise, which has grown profitably over the last decade, with over 15,000 users globally.

"Prior to implementing Prophet CRM, I struggled with keeping client data organized and accessible. I had years worth of information in several different places, and it was hard to track. However, since implementing Prophet, I am enjoying streamlined databases from which I can generate accurate lead generation reports. In fact, just within the last two..."
Ken Brown
Prospectus Mortgage

"Everything is tracked (in Prophet). We know who did it, what they did, and when they did it."
Kyle Wagner
HIP Operations Manager, Stonegate Mortgage

"As we consider expanding CRM systems to our other affiliates our familiarity with Prophet and comfort level with Avidian's expertise made the analysis easier. It just works, and their supporting services are good — which is refreshing considering the everyday challenges my team face as an IT service provider."
Eric Shelton
VP of Information Technologies, Alston Construction

"I chose Prophet primarily based on the ease of inputting the data and the ability to track my business in real time."
Kevin Santaularia
CEO, Bradford
ABOUT CRMNEXT

CRMNEXT is the leading global cloud CRM solution provider. It has practice leadership across nine verticals assisting businesses from SMEs to Fortune 500 businesses in optimizing customer relationships. It is also pioneering a Digital CRM rollout for some of the largest enterprises across Asia-Pacific. CRMNEXT’s customers include global brands like HDFC Bank, ICICI Bank, Axis Bank, Pfizer, Tata AIA, National Bank of Oman, Pavers England, etc. It was recently lauded in the Gartner Magic Quadrant 2015 for Lead Management, Sales Force Automation and Customer Engagement.

“CRMNEXT has enabled us to build a robust service platform with a unified and flexible interface to manage all our customer touch points for marketing, sales and service management.”

Faizal Eledath
Chief Information Officer & Head of Transformation, National Bank of Oman

“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

“We were searching for a CRM system that would provide First Bank associates with the tools to have better conversations and more efficiently handle account opening and customer inquiries. CRMNEXT is the only comprehensive solution that does it all, and we’re excited to partner with them. We believe the CRMNEXT solution provides the right...

Cathy Dudley
Executive Vice President, First Bank

“CRMNEXT has been able to align our thinking and approach in a single execution platform. Automation of processes and smart planning of activities have helped us to increase both wallet share and market share.”

Tarun Katial
Chief Executive Officer, 92.7 Big FM

26 Customer references from happy CRMNEXT users

VIEW ALL REFERENCES
ABOUT CLOSE

Close is a sales productivity platform built to help you close more deals. With built-in calling, SMS, and email—your team can communicate with prospects and customers all in one place. It’s an “all-in-one” platform which you can use standalone without needing any other sales tools or calling products. Close is cloud-based, affordable, easy to learn and comes with straightforward pricing, which makes it the perfect fit for small and midsize businesses. Plans start at $65/user/month.

Close is designed with the goal of making sales people as efficient as possible. Make and receive calls with just 1-click. All calls are logged automatically (no manual data entry!). Lead activity information pops up as soon as the phone rings so the data you need is always at your fingertips! Looking at scalability? With bulk email automation tools and cold calling features like the power and predictive dialer, you can reach large lead lists quickly and perform high volume sales in Close. The software also provides sales teams with a visual representation of ongoing sales processes. Primary features include lead management, global calling management, 2-way email sync, and reporting. Other features include a built-in text messaging feature, sales pipeline view, email marketing tools, and predictive dialing. The software has an open API and offers integration with 50+ applications including Zapier, Zendesk, and Wufoo. Support is offered via email, phone, online FAQ documentation, and a self-service knowledge base.

"What sets Close.io apart from other CRMs is the quality of its data. It automates the collection of sales interaction data and compiles it in seconds."

Michael Carney
Editor, PandoDaily

"With Close, we were able to reduce our sales cycle to less than one month, from the first client call to a closed deal."

Michael Occhipinti
Vice President of Sales, NatureBox

"Some contacts prefer me to follow up with them via SMS. It was a pain having to switch between devices to send them messages. But since I started using SMS in Close.io, I can now communicate with them all in one place and my reach rates have doubled!"

Steven Castaneda
Mortgage Consultant, Triumph Lending

"After testing other CRMs, I was blown away by Close.io’s clean, easy-to-use interface, communication tracking, and detailed reporting features. Tracking communication with Close.io has made what was a very time-consuming process extremely efficient."

Jacqueline Davis
Program Manager, Loyalty Research Center
ABOUT COMMENCE CORPORATION

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, customer service, and project management. Commence may be deployed online via a cloud computing environment on on-premise as a desktop solution. Mobile connectivity and integration with social media are also components of this top-rated CRM solution.

"Commence has been instrumental in keeping us organized. The ability to log calls and meetings, schedule appointments and filter by numbers and cities while on the road enables us to store and retrieve useful contact information as needed. The Commence representatives are always helpful, knowledgeable and willing to spend the extra time to assist us."
Audrey Taylor
Sales Representative, MediHerb

"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

"We've been using Commence CRM for some time. It handles our in-house ticketing (reserved seating and general admission), rental events, estimates and invoices, patron database, rental client database, events calendars, employee scheduling, reporting, and so much more. It is solid, feature-filled, quick to learn, and incredibly flexible. Customer...
Paul Miller
Liberty Performing Arts Theatre

"After reviewing several web based CRM solutions we selected Commence based on the company's impressive track record, strong customer references and product features that seem to differentiate Commence from the pack. We are quite pleased with our decision."
George Mulling
Managing Partner, CapGenic Advisors, LLC
ABOUT GOLD-VISION CRM

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 the software authors and experts.

"Integrated CRM, campaigns & email marketing has improved our communications and allowed our sales & marketing teams to work together more effectively.”
Julia Wallace
Marketing Director, GFC

"My favourite feature is email tracking. It is so easy to go into an account and see the recent history.”
Simon Dawe
Sales Manager, Campbell Scientific

"The whole story of all our different interactions is available in one account. Because our data is so well organised in Gold-Vision, we are able to segment our sources and send highly targeted campaigns for future events.”
Kimberly Carsok
Project Manager, OTSA

"A truly integrated approach to managing customer and supplier communications, leads and opportunities, projects, support tickets, and more - highly recommended.”
Andy Smerdon
Aquatec

Customer references from happy Gold-Vision CRM users

VIEW ALL REFERENCES
ABOUT HONEYBOOK

HoneyBook is on a mission to help creative professionals streamline their jobs seamlessly, so they can focus on what they do best: creating unforgettable moments. HoneyBook’s platform handles contracting and payment processing, while also connecting users to communicate and collaborate with one another. HoneyBook gives clients the tools they need to build a modern and thriving business.

"HoneyBook has changed the game for me. Being able to send contracts, invoices, and receive payment online in one spot is worth every penny!"

Cayli Quiroz
Foxtrot Film Co.

"HoneyBook has made booking, scheduling and reminding clients about payments so much easier. It's like adding another employee to our family run business!"

Samantha Heberlein
Willowbrook Mill

"I use HoneyBook for everything from inquiry, application, intake, questionnaire, contract, invoice, and communication. It's a one-stop portal for all of my coaching business."

Becky Mollencamp
Business Mindset Coach, Becky Mollenkamp, LLC

"We started using HoneyBook and immediately saw a difference in the number of clients we were booking. The ability to customize templates and brochures has increased our conversion. We originally received inquiries and were left in the dust, but HoneyBook allows us to showcase our brochure with ease."

Trevor
Owner, Reel Time Films
ABOUT 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.

34 Customer references from happy Less Annoying CRM users

"I have used others, but this an ideal combination of simplicity and organization. At your desk or on the go there is no better way to manage every task and process I need to be sure that no promise is overlooked and no opportunity is missed."
Adrian Walton
Canada Purple Shield

"I love the simple $10 per month per user, cancel anytime policy. It gives me great, no hassle, flexibility. This CRM is very versatile and has rich functionality. I love it, my team loves it, and I highly recommend it to all. Customer service has always been prompt and helpful (very important in today's cloud world), and the software itself is intuitive and user...
Kirk Barry
Verdantis Advisors

"We chose LACRM because our previous program was becoming too tedious for the salesmen and they spent more time dealing with admin stuff rather than selling. I found LACRM to be more user-friendly, salesmen picked it up within a short training and by the next day we were up and running with no problem. Tracking customers, orders and database with...
Pat Masino
DNE Neutraceuticals

"Less Annoying CRM provided free easy demo videos, and impressively fast email responses to our questions. Any sales team can figure this one out without lengthy training. Pipelines can be built within minutes. LACRM will ‘force’ any other CRMs to go out of business. Pricing is competitive and customer service is without question - the best in the industry!
Mike Barclay
Director of Business Development, SHIPHAUS
ABOUT ONCONTACT

OnContact CRM by WorkWise is a full-featured, flexible and customizable Customer Relationship Management (CRM) application that provides the competitive edge your company needs. Offered as a cloud or on-premise deployment, this browser-based CRM application automates the sales, marketing and customer service areas of your company, delivering the power to create, cultivate and grow outstanding relationships.

“OnContact 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 OnContact does make us more responsive.”
Ryan Holzhauer
Vice President of Sales, Olympus Group

“Everything integrates seamlessly. Bringing in inventory management has been a huge benefit for us. Being able to jump between workbenches and different points of data has been really nice.”
Pam Reynolds
Chief Financial Officer, CapstanAG

“The screens within OnContact CRM are incredibly easy to use and navigate. We no longer have to waste time scrolling endlessly, as the product is user-friendly and designed to be efficient. A lot of the time, it’s hard to get salespeople to actually use a CRM solution consistently—we’re hoping that OnContact makes it easy for them to do so. In addition,...
Dave Manahan
Corporate Business Process Improvement Director, Strongwell

“Our sales people don’t have territories, so OnContact really helps us avoid cross-selling. It also lets us track the sales process: where prospects are at within the sales cycle, highlights certain opportunities to tackle. In addition, it helps us keep a much stronger database of information regarding our contacts and their companies.”
Mark Klenz
Director of Sales Development, Coakley Brothers
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.

"We are now significantly ahead in sales compared to last year. I have no doubt that Vtiger has been a key contributor to these results. Our sales teams are better supported, more organized and their productivity has improved some 25%. With our growing opportunity..."

John Bradford
Marketing Manager, Breezway

"Every day, I work on various projects related to different organizations. Without Vtiger’s Project feature, managing my daily tasks would have been a nightmare. I prioritize my project tasks and set deadlines for completion. And every week, I generate reports to monitor the progress. As the deadlines approach, Vtiger sends me smart reminders - helping me..."

Kirsty Englander
Founder, RTR Association

"Our sales and support teams are very appreciative for the tools that Vtiger provides them as the manual processes were a time killer. The quoting process alone has likely saved numerous hours per week for each sales associate."

Tom Hutchinson
CRM Administrator, DH Wireless Solutions

"With Vtiger we implemented an effective ticketing system which was not possible with other CRMs. We set up custom workflows in Vtiger with minimum efforts. We built new modules to track reseller interactions and order information with Vtiger’s Module Builder to capture extra information that was previously not possible."

Purva
ProImageExperts
ABOUT WORK[etc]

With integrated CRM, projects, billing, help desk, reporting and collaboration, WORK[etc] is the all-in-one cloud-based software solution to manage your growing business. WORK[etc] gives users complete control over the data they enter and the data they want to see. Custom fields, projects, and processes 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 aspects of the entire customer lifecycle.

WORK[etc] is there every step of the way — from the initial sale through to quotes, projects, product delivery, invoicing, customer support, and that all-important followup sale. WORK[etc] captures everything you do with your contacts, be it correspondence, amendments, or new projects and sales. Through its extensive activity history module, it encapsulates the very meaning of CRM — a running record of the relationships you have with your contacts, from the very first email you sent them to the latest support ticket that they filed. Turn any email into a lead, contact, or support ticket using the Gmail widget and Outlook add-in. Set up two-way syncing between WORK[etc] and Google Contacts. Access all of your Google Drive and Box files without having to leave the CRM environment. Capture notes and ideas in Evernote and turn them into project updates, tasks, and leads. WORK[etc] also features full integration with Xero Accounting and QuickBooks, two of the most extensively used accounting programs today. Importing data from Xero and QuickBooks to WORK[etc] is quick, painless, and provides an extra layer of functionality to the system’s financial module. Say goodbye to painful integrations and multiple costly web apps and say hello to big-time productivity and efficiency when you grow your business with WORK[etc]. It’s more than just a CRM.

“WORK[etc]’s project template feature enabled us to accurately track all of our billable hours and see where we were losing money in projects. This then allowed us to plug the holes!”
Brittany Thompson
Social Media Marketing Manager, Virtual Resort Manager

“WORK[etc] allowed us to access all the project information online. We could manage resources and proactively predict any potential delays in production. It also provided our clients with an easy-to-follow way of tracking the project’s progress.”
Stan Zaslavsky
Owner, Eagle Vision Property

“That’s where we use WORKetc’s projects module as a sort of to-do list. We built one template, and every time we have a similar project we just duplicate the template. We use it to check that nothing is forgotten, everything is done properly, and everything is done in the correct order. We also use the projects module to assign specific tasks to the right people.”
Thomas Berard
Co-Founder, Happy Monday

“WORK[etc] has helped us drive growth by providing a single platform to handle our ticketing, project management and invoicing. The more we can streamline our back-office processes, the more value we can deliver to our clients.”
Joshua Peskay
Vice President, RoundTable Technology