Customer Relationship Management (CRM) Software Category
Customer Relationship Management (CRM) Software Category

Customer relationship management (CRM) 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.
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

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**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.
2022 Customer Success Awards

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

**MARKET LEADERS**
- act!
- copper
- Creatio
- CRMNEXT
- Freshsales
- HubSpot
- insightly
- keap
- Dynamics 365
- ORACLE NETSUITE
- pipedrive
- Pipeliner
- Sage CRM
- salesforce
- sugarcrm
- SuperOffice
- Zoho CRM

**TOP PERFORMERS**
- affinity
- AgileCRM
- Close
- freeagent
- MAXIMIZER CRM
- NetSuite
- Nutshell
- thryv
- Unanet
- vtiger
- zendesk sell

**RISING STARS**
- Commence
- gold-vision
- Method
- OpenCRM
- Offfront
- WORKbooks
- WORK[etc]

* Companies listed in alphabetical order
ABOUT ACT!

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.

126
Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“Even though Charter Capital’s team is just 20 percent the size it once was, the company’s still achieving 75% of its previous sales volumes. That is in large part due to Act!.”

CAREY WILBUR
FOUNDER & PARTNER, CHARTER CAPITAL

“The Act! Marketing Automation (AMA) platform has helped us simplify our marketing communication processes because it’s so easy to customize and update.”

GORDON CASE
DIRECTOR OF SALES AND MARKETING, THE SHERMAN SHEET

“If I didn’t have it, I’d be lost. I wouldn’t know where to turn. My Act! as a resource is worth at least $500,000 to me.”

HAL HANSTEIN
PRESIDENT, CARDINAL REALTY GROUP

“Act! Marketing Automation has really streamlined the efficiency of how we get new sales. Not only does it save us a lot of time, but it also gives us a much better return on our marketing efforts.”

MARK REID
OWNER AND V.P., SALES & MARKETING, TECHNICAL SYSTEMS
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 simplify work, drive growth and deliver awesome experiences to over a billion folks around the globe. Gartner recognizes CRMNEXT as a leading player in sales force automation, service management, and lead management. For more information, visit www.crmnext.com

Featured Testimonials

“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 tools to help our associates focus on the customer and differentiate our service.”

CATHY DUDLEY
EXECUTIVE VICE PRESIDENT, FIRST BANK

“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

“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.”

AVINASH RAGHAVENDRA
EVP AND HEAD - IT, AXIS BANK

TRUSTED BY
ABOUT COPPER

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.

FEATURED TESTIMONIALS

“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

“I’ve spent MONTHS looking for a CRM that would work seamlessly with Google Apps and allow me to better manage tasks and follow-ups. ProsperWorks is the first one that I got excited about and works beautifully.”

DEB MILLER
OWNER / LUXURY TRAVEL DESIGNER, EDGE OF WONDER TRAVELS UNLIMITED

“After using and discarding multiple CRMs, I was ecstatic to find a tool that did exactly what we needed it to right out-of-the-box. BY FAR the cleanest and most intuitive too I’ve seen.”

BRETT BYMAN
CEO AND CO-FOUNDER, NOBL HEALTH

“Copper acts as an aggregator of data around all of our customers and potential projects. Because it is an all-in-one platform that everyone has access to, it became a very attractive solution.”

BRANDON MARTIN
VP OF BUSINESS DEVELOPMENT, LOCAL ROOTS FARMS

TRUSTED BY
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.

136 Total Customer References

Featured Testimonials

“A good CRM solution must be capable of creating processes, configuring processes without doing any coding. This is done very well by Creatio.”

ELMAR STENZEL
ASSOCIATE DIRECTOR AND HEAD OF CRM COMMUNITY, SOPRA STERIA

“Having a low-code CRM tool as a salesbook and a single source of data allowed us to provide our salespeople with top-notch solutions to streamline our sales process.”

TIM RYAN
REGIONAL SALES MANAGER, HERSHEY’S ICE CREAM

“The flexibility and easy customization were the most attractive aspects for us in choosing Creatio. We were also impressed with the timeframes and high delivery standards guaranteed by the company.”

DMITRI PETLIN
HEAD OF INTERNAL SERVICE OPERATIONS, TELE2

“Creatio seems to have pretty much everything our clients have asked for: capabilities in the foundation you can modify because, certainly, things will change over the years - all in a really adaptable platform that gets the job done.”

DICK WOODEN
PRESIDENT AND FOUNDER, SUCCESS WITH CRM CONSULTING
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.

149
Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“By automating emails and tasks, Intelligent Workflows in Freshsales ensure all leads and deals are managed efficiently. The flow-on effect of this means absolutely no leads or deals are mismanaged, making the team more productive and, of course, causing an increase in sales.”

PATRICK BARNES
CO-FOUNDER AND CHIEF EXECUTIVE OFFICER, ADVOCATELY

“Freshsales allows us to focus on converting our leads. The interface is so intuitive that our new sales staff do not require training on how to use Freshsales, they just hit the ground running.”

CHRIS GAULIN
PRODUCT MANAGER, FASTOCH

“Freshsales helps us manage all our sales activities with just one tool. The inbuilt Sales Campaigns feature is very easy to use and offers smart features. We have been able to easily automate and scale our email campaigns and improve our sales conversions.”

PASCAL MOULIN
CHIEF EXECUTIVE OFFICER, PESARIS

“Freshsales’ simple interface gives us a clean and minimalistic view of customer data. We almost went with Salesforce until we learned about Freshsales. It was incredibly easy to use, and came with all the features we needed.”

GUY BRAND
CO-CHIEF EXECUTIVE OFFICER, BIG SHOT

TRUSTED BY

Advocately  BIGVU  Chargebee  cadence health  psi  CALIPER
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 Capital, OurCrowd, Durable Capital Partners LP, Vintage Investment Partners, Battery Ventures, Citi Ventures, Zeev Ventures and 01 Advisors.

**Featured Testimonials**

“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 MOLLENKAMP**
BUSINESS MINDSET COACH, BECKY MOLLENKAMP, LLC

“This saved me SO MUCH time when it came to following up with clients. This is the cornerstone to my process because it’s all automated.”

**ANDY LYDICK**
CO-OWNER AND STUDIO MANAGER, ABIGAIL GINGERALE PHOTOGRAPHY

“I love the ability to create a workflow and it’s made sending out contracts so much simpler!”

**ERIN LOFTIN SERVENTI**
E.L. DESIGNS

“HoneyBook keeps all of my communications with each client in one place, including payments, photos exchanged, previous work done, emails, proposals and invoices saving me hours a day.”

**MARISOL MORLEY**
OWNER, TINY KITCHEN TREATS
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.

Featured Testimonials

“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 manufacturing process.”

PETE ENDRÉS
CO-FOUNDER, PARLOR SKIS

“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.”

RONALD SUHNER
MARKETING MANAGER, VIRTAMED

“With the HubSpot CRM, they can see every interaction that a lead has had with us, which means they have the context to have much warmer conversations. They can also pull up dashboards that track their monthly progress. That’s a great motivator; they always want to exceed last month’s figures! HubSpot Sales Hub helps with that – for example, a salesperson will get a notification whenever a lead opens an email or clicks on a link they sent, so they can reach out at just the right time.”

NIKBIN ROHANY
CHIEF EXECUTIVE OFFICER, SHORE

“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

TRUSTED BY
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.

**Featured Testimonials**

“Prior to Insightly, we had to manually enter contact records into our CRM. Insightly’s web-to-lead forms automatically create and route lead records on our behalf, freeing up more time for other value-added activities.”

ELAINA PRINCIPATO  
MARKETING COORDINATOR, NIX SENSOR LTD.

“We have an ambitious sales team that spans the full spectrum of experience levels. We needed a CRM that provided everything a veteran rep would want, but it also needed to be easy for new team members to pick up. Insightly was the clear choice for us.”

JOE CRUZ JR.  
FOUNDER & PRESIDENT, YAVE TEQUILA

“The key to CRM is seamless integration. We use Gmail and Google Apps extensively and really enjoy the tight integration provided by the Insightly Gmail gadget. With Insightly, we get an easy-to-use, fully integrated CRM and document management tool that users rely on every day.”

FRANCK SIDON  
PRINCIPAL, TAX ASSIST ACCOUNTANTS

“There are a lot of shiny toys out there for realtors. What we really need is a good CRM that keeps us focused, and keeps us doing the things that we need to do, which is why I’ve found Insightly’s simple solution to be the best way to manage my real estate business.”

JEFFREY DOUGLASS  
REAL ESTATE BROKER, WINDMERE REAL ESTATE
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.

123 Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“"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.”

DAMIEN SANCHEZ
FOUNDER, DC MOSQUITO SQUAD

“I found Keap in a very funny way. I was trying out another CRM software program, but kept bumping into Keap. I liked it a lot better than the other software because everything was easier. After my third futile day with the competitor I signed up for Keap—and I've never looked back.”

NUNO SILVA
FOUNDER, PAPELOJA

“Keap always has my back and they make sure I look shiny and bright to any potential prospects. If you want to be serious about your business, you need a serious tool to do it, and that’s what Keap provides. Keap keeps track of your money, keeps track of your leads, and creates easy-to-use follow-ups for success. I love it!”

VIX REITANO
FOUNDER, AGENCY 6B

“The mobile app lets me run my business from my phone. You can send appointment links for lightning-fast responses to prospective or current clients after calls.”

LISA YEE-LITZENBERG
GREEN CAREER ADVISOR

TRUSTED BY

BEAUTYCOUNTER
BERKSHIRE HATHAWAY HomeServices
Think Big
Wyndham Hotels and Resorts
BEAUTY & THE BOSS

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
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.

**Featured Testimonials**

“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.”

KAREN DELI  
EXECUTIVE VICE PRESIDENT, SPECIALISTS ON CALL

“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.”

TOM FAILLACE  
SENIOR IT GENERALIST, LUCK STONE

“SharePoint captures our sales processes, Dynamics CRM Online enables rapid follow up on leads and orders, and Office 365 centralizes the creation, storage, and sharing of quotations and sales reports.”

DAVID WAWORUNITU  
PRESIDENT DIRECTOR, EON CHEMICAL SOLUTION

“We moved to the cloud and upgraded to Microsoft Dynamics CRM Online to eliminate all customization, gain frequent feature upgrades, and tie it to Microsoft Office 365, which all our sales and administrative employees use.”

NEVEN BRADASEVIC  
MANAGER, CUSTOMER RELATIONSHIPS, COLLIERS INTERNATIONAL
ABOUT 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.

1659
Total Customer References

Featured Testimonials

“NetSuite’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.”

COLOGIX

“NetSuite helped us consolidate our financials and CRM, and that led to a significant reduction in the hours we were spending on accounting. But it also let us redirect our time to better, more strategic projects like forecasting our cash flow and profitability - critical for a services-based business.”

JONATHAN HILLAND
CEO, MINDWAVE RESEARCH

“NetSuite integrates ecommerce, inventory control, order processing, CRM, financial reporting and other functions in a way that really fits our business needs.”

JOHN BAKER
CHIEF EXECUTIVE OFFICER, THOS. BAKER

“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

TRUSTED BY

ASICS, BOX, DocuSign, elf, girl scouts

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
ABOUT PIPEDRIVE

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. The goal at Pipedrive is to make sales success inevitable - for individual sales people and teams.

Featured Testimonials

“Love this program. It is the only CRM that I actually want to use. Having a CRM that you don’t want to use leads to your team not using it. What’s the point of that. Pipedrive is built by sales people, for sales people.”

RICK FEINEIS
MANAGING PARTNER & SENIOR TRAINER, CAD TRAINING ONLINE

“Best sales-focused CRM I’ve ever used by a mile. The pipeline views and multiple pipelines are the features that really make it for me. Pipedrive blows all those other bloated junk CRMs out of the water.”

PAUL MURRAY
DIRECTOR, MILLER JACKSON

“We’ve used multiple CRMs to manage tens of thousands of rental homeowner contacts for rented.cm, but Pipedrive still has our favorite visuals for deal pipeline and conversion rates throughout the funnel. If you are looking for an easy, intuitive, CRM for your company, try Pipedrive.”

MICKEY KROPF
COO, RENTED

“Pipedrive is a simple and easy to use CRM platform that takes the headache away from sales administration, allowing you to reallocate time to actually making sales. The support provided by Pipedrive is also brilliant, with a help service easily accessed at all business times. If you are looking for something that has a simple user interface with a clear visual representation of business 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
TROUDIGITAL

TRUSTED BY

act-on
360PAYMENTS
Calldrip
Lessonly
TREKK SOFT
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 is why it drives the highest adoption rates, lower Total Cost of Ownership, and rapid Return On Investment. Plus with fast onboarding and how easy it is to learn to use and/or administer the system, there is little to no business ...

Featured Testimonials

“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
COGNISCO

“Pipeliner is the least intrusive CRM that I have played around with, and it still has everything there that I need. It is very sales-forward. It’s got all the stuff on the backside that’s needed for other people—we’re using it in an accounting application as well.”

CHRIS COLLIER
VICE PRESIDENT OF SALES AND MARKETING, WHOLE HARVEST FOODS

“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

“I’ve been really surprised by how quick and simple it was. We needed some customized CRM platform and it’s been so simple to update dashboards, show opportunities and display the opportunities we wanted to, as well as import different types of data.”

CHRIS WIGAN
VICE PRESIDENT OF SALES AND PARTNERSHIPS, COLLABORO
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.

337
Total Customer References

Featured Testimonials

“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

“Sage CRM has helped us to open up more sales opportunities through better client management, without further expanding our sales force.”

GARY MILLNER
CORPORATE DIRECTOR OF RELATIONS & COMMUNICATIONS, IFS SCHOOL OF FINANCE

“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

“Sage CRM enables us to effectively manage process flows and to track the customer’s application throughout. The customisation capabilities of the system allows us to adapt it to our specific business needs and the software's ability to integrate with other systems enables us again to scale down on manual work and prevent the duplication of information on other systems.”

GARY LIGHT
OPERATIONS DIRECTOR, IDM

TRUSTED BY

AVIS

Veolia

Widex

Dassault Systemes

FUJIXerox
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 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.

1472
Total Customer References

Featured Testimonials

“We chose Salesforce because it was very flexible and easy to customize. That was very important to us — to ensure that this became our CRM, and had our language and processes.”

NICK CLAYTON
SENIOR DIRECTOR OF GLOBAL SALES, HARVARD BUSINESS PUBLISHING

“We wanted a CRM system that would differentiate our customer experience while also integrating all processes on one platform, enabling our teams to perform better. We chose Salesforce because it is the world’s No. 1 CRM platform.”

GUNASEKARAN R
HEAD - DIGITAL MARKETING, VIJAY RAJA GROUP

“Salesforce is awesome. With the Salesforce1 Mobile App, I can see approvals, workflow, funding, even who is applying for loans on a minute by minute basis.”

DAVE GIROUARD
FOUNDER AND CEO, UPSTART

“We chose to go with Salesforce for its intelligence, its scale, and its ability to support our needs beyond just the basic CRM.”

MICHAEL EGGERS
DIRECTOR OF FINANCE, AMAZON WEB SERVICES

TRUSTED BY

3M  ABB  ALDO  COMCAST BUSINESS  Deloitte
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.

Featured Testimonials

“She told me sugarCRM and Open-Source as a way for companies to avoid the traditional limitations of a CRM solution. EasyContact on top of Sugar Enterprise has given SACE the flexibility to have a continuously improving CRM system that meets our needs.”

-DARIO RIGOLIN
EVP, CORPORATE DEVELOPMENT, SACE

“SugarCRM perfects our customer management and supports us actively in attracting new customers.”

-JACQUELINE SLINGERLAND
MARKETING MANAGER, GREEN VALLEY

“The choice of SugarCRM was reassuring because it is among the most widely distributed and integrated open-source solutions for many of our SME clients.”

-JEAN-PHILIPPE MALICET
DIRECTOR, CAP'TRONIC

TRUSTED BY

zenoss  
Coca-Cola  
Reebok  
Mavenlink  
LOOMIS  

Customer Relationship Management (CRM) Software Category
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.

154
Total Customer References

FEATURED TESTIMONIALS

“SuperOffice CRM Online is a great tool that helps us getting a overview of our customers. This makes us more efficient and creates customer satisfaction.”

THOMAS ERIKSEN
PARTNER, BLUEPEOPLE AS

“SuperOffice CRM Online is a safe choice for anyone who wants a good customer management tool and emphasizes flexibility and low costs.”

BJORN ERLING HUSA
MANAGER, FINANSRINGEN AS

“SuperOffice Online CRM is a very user-friendly system which collects all customer info in one place.”

TINNA BERGH
SALES COORDINATOR, CLIC A/S

“SuperOffice CRM Online is crucial to keep track of follow-ups and customers at Giraff Media AS. SuperOffice has helped us get a stable customer growth and increased revenue since our startup.”

CHRISTOPHER WROLL HAGEN
MARKETING MANAGER, GIRAFF MEDIA AS

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DENNIS EAGLE  
Panasonic  
SHARP
Be Original.

Printed Cup Company

DB NETZE

FEATURED CUSTOMERS

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
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.

290 Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“Zoho CRM lets us disperse website leads to our team, and we've set up some automated processes, alerts and tasks to make sure that we give our customers the best possible service and support.”

KEVIN LIPPERT
PRESIDENT, JETHUB

“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

“Zoho changed everything for us. Customization within Zoho CRM was flexible and helped us get a CRM system of our own. We used Zoho CRM for both B2B and B2C sales processes.”

BRENNA CRAFT
BUSINESS ANALYST, MOGL

“From an underlying database standpoint, Zoho CRM is fast. Searches and clicks on the screen as well as interacting with the interface are crisp and efficient.”

SCOTT BROWN
SENIOR EXECUTIVE, ATLANTA WORKING CAPITAL

TRUSTED BY

amazon
cloudbakers
SHERPA
Allegiance MOBILE HEALTH
as allergy standards

featured customers

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
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, California.

65 Total Customer References

Featured Testimonials

“Affinity is a very useful, tailor-made product for such a Venture Capital fund like us. The biggest advantage is having all of our data and communication in one place. We talk to thousands of startups and hundreds of VCs, and Affinity lets us keep track of those relationships over time.”

MARcin ZABIELSKI
PARTNER, MARKET ONE CAPITAL

“Affinity has helped us centralize our CRM efforts in the most automated way by organizing our pipeline, community, to do’s, and distributing our Alliances to portfolio companies.”

MICHAEL TAM
PRINCIPAL, CRAFT VENTURES

“Affinity keeps us organized! It is perfectly tailored to what we need. Cataloging all of our emails and grouping them by an organization made it much easier to track contacts and report on how we’re managing deal flow.”

ADAM STRUCK
FOUNDER AND MANAGING PARTNER, STRUCK CAPITAL

“Managing your relationships is everything in commercial real estate. Affinity allows us to manage more clients and all our data in one place. That will lead to more top-line for our business.”

MICHAEL SANBERG
LEASING AND SALES, TOUCHSTONE COMMERCIAL PARTNERS

TRUSTED BY
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

Featured Testimonials

“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

“We like Agile CRM because it’s built for a combination of offline/online business, like a Saas company that manages enterprise deals. It’s full of features, but doesn’t feel cluttered as they keep things clean and simple. And we love that they keep adding integrations.”

MEGAN PILLSBURY
OPERATIONS DIRECTOR, APPLIED WINE

“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!”

GARY TRAMER
CEO, LEADCHAT

“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

TRUSTED BY
ABOUT CLOSE CRM

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.

75
Total Customer References

Featured Testimonials

“Close.io radically increased the number of calls and emails to our leads by logging everything automatically so the reps can focus on talking not logging.”
JEFF ZWELLING
CO-FOUNDER, CONVERTRO

“Loving the call coaching feature. It’s the piece that we needed to train up how we want. I was able to jump on a call with a rep where I picked up a number of crucial aspects that will make their next call even better.”
ADRIAN ISAAC
HEAD OF SALES & CUSTOMER SUCCESS, COUNTFIRE

“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

“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 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.

90
Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“The overall attention we received throughout our shopping for CRM made FreeAgent the obvious choice. The interface is attractive, easy to use, and the incredible support team provides help to import all of the customers, leads, and contact information. Adding and editing contact info is easy, and linking business email addresses and phone numbers takes seconds, so the functionality to make calls and targeted emails within the CRM itself is a great tool.”

CHRIS ASGIAN
INFINIT NUTRITION

“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

“FreeAgent CRM is worth it. The product and the people behind it are great. Simplicity is the word I would use to describe it. It will get you started quickly and your team and performance will definitely improve.”

JIM HATHAWAY
CHIEF EXECUTIVE OFFICER, JTEK DATA 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

TRUSTED BY

Allianz
ACC
CWS
CHICAGO TITLE
NEWFI

Customer Relationship Management (CRM) Software Category
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.

166
Total Customer References

Featured Testimonials

“Maximizer CRM has helped us optimally map our sales process from lead capture to opportunity level for the most targeted follow-up activities that consistently bring in sale after sale.”

MARC ALLARD
CEO, PROCESSIA SOLUTIONS

“In our business, you need detailed information for your most recent customers at your fingertips. With Maximizer Mobile CRM our sales team remains up to date and knowledgeable about customers, their needs, their inventory and our own inventory. We can send out specification sheets and quotations right from our BlackBerry smartphones.”

DENNIS FANNING
PRESIDENT, PLATINUM EQUIPMENT

“With every moment of customer interaction time critical to our livelihood, Maximizer Mobile CRM helps us hone in on opportunities by filling in the gaps between scheduled sales calls and visits. Our number of sales touch points have increased substantially.”

PARKER LANCASTER
PRESIDENT, PSI FLUID POWER

“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.”

DAN MOORE
SENIOR VICE PRESIDENT, ROBERTS ONSITE

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vianet
Prudential
CAMPUS Manitoba
Best Western
123PRINT

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
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 …
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.

55 Total Customer References

Featured Testimonials

“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

“One thing I like about Nutshell a lot is they have a very flexible and very reasonable pricing structure. You pay monthly, you pay for the number of users, and they don’t have these kinds of contracts that lock you in.”

JASON MARS
CHIEF EXECUTIVE OFFICER, CLINC

“Nutshell is the backbone of our sales process. Low cost model is perfect for the various businesses I am involved with. I have personally recommended Nutshell to at least a dozen other companies/users.”

GABE GALVEZ
CEO, CAPTARGET

“Nutshell is simple. It’s as user-friendly as it gets and new sales reps pick it up more quickly than any other CRM we’ve tried.”

CHRIS JOFFE
OWNER, JOFFE EMERGENCY SERVICES

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G.A. Richards Group
FuelCellsEtc
BROTHERS
UMBRIA
bloomerang

featured customers

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
ABOUT 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 companies in the U.S.

100
Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“Since we started using Pipeline CRM, our cold calls and sales have increased significantly! We’re able to monitor our daily calls, deals, and upload documents that our team can access anywhere.”

HAITTAM GEORGE GREIB
FOUNDER/PRESIDENT, PRESTIGE WORLDWIDE LOGISTICS

“As a semi seasoned implementer of CRM solutions, I must say that I am in awe at the simplicity and ease of use with your solution! I cannot express clearly enough the pure joy of being able to walk through the set up process, customize to my needs, invite fellow testers and begin using the product in less than 2 hours! Just fabulous!”

CAROL NORDIN
PRESIDENT, TOUCH SYSTEMS

“After reviewing many other CRM solutions, I made the decision to implement Pipeline. For our simple sales cycle, it’s absolutely perfect. We have an in-house production management product, so this is really only needed for the front end of the sales cycle and does the job to perfection. It helps me stay on track with current deals and neglected customers, plus they don’t require an implementation up-front cost like other solutions.”

KEVIN ZERBE
VICE PRESIDENT, WHITNEY PRINTING COMPANY

“My sales team loves the convenience and ease of use that Pipeline CRM brings. It’s a great solution for any team seeking an efficient way to organize leads and turn them into sales!”

JENNIFER VO
MARKETING, GROUP ISO

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FINANCIALFORCE
Loyola Marymount University
FARMERS INSURANCE
Deloitte
Benjamin Moore
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.

Featured Testimonials

“Thryv’s CRM feature helps me stay organized and engaged with my clients.”

PAULA BLAIR
OWNER, SOAR CO-WORKING

“I couldn’t imagine going back to another software. Thryv keeps us onboard, keeps us going and we’re always moving forward with Thryv’s help.”

GENCO FLOOR COVERING

“I can monitor everything in real-time, and I have a genuine pulse of what’s going on in my business at all times.”

BRIAN PAYNE
CRITTERPRO INC.

“The Client Portal is easy for customers to log in, get directions, and send us a message. It just makes communication simpler.”

MICHAEL BURROWS
OWNER, BEYOND AQUATICS

TRUSTED BY
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. Our mission is to empower Architecture, Engineering, and Construction professionals with a cloud-based CRM and Proposal Automation solution to simplify their lives and win more work. About Us Since its founding by Dan Cornish in 1999, Cosential has been providing comprehensive CRM and ...

64
Total Customer References

VIEW ALL REFERENCES

Featured Testimonials

“Our marketing and business development teams are huge proponents of Unanet CRM, and all our lines of business have really come onboard with it, too. People are finding uses for CRM that they could never imagine before.”

BOB FREY
DIRECTOR OF SALES AND OPERATIONS, UMC

“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.”

ANTHONY RUSS
RESOURCE COORDINATOR, CONSIGLI CONSTRUCTION

“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

“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

TRUSTED BY

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34
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.

FEATURED TESTIMONIALS

“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

“With Vtiger CRM, our sales managers generate sales reports regularly to track opportunities in the pipeline. And if the managers spot opportunities in the same status for a long time, they quickly intervene to check if sales reps are facing any difficulties in progressing the deal. Since Vtiger helps us keep our sales pipelines accurate and healthy, we are able to estimate monthly targets and forecast our quarterly sales better without any guess work. Visibility into sales pipeline and accurate forecasts fuelled our 34% CAGR. And we could achieve this with no increase in the number of employees in the team. For us that was incredible. Vtiger helps our sales team get more done in less time and reach monthly targets faster.”

SANJAY RAY CHOWDHURY
CEO, RUSSAIR TECHNOLOGIES

“In Vtiger, everything is 100 percent customizable, so I can set up the workflow any way that I want. If employees miss a step or don’t do something correctly, we know about it immediately, so the most important leads are never wasted.”

SRIRAM MANOHARAN
CO-FOUNDER AND MANAGING DIRECTOR, CONTUS

“We were looking for the best CRM on the market, we compared the capabilities and decided that Vtiger has the tools, characteristics, and features that we were looking for at an unexpectedly low cost per seat.”

WILMER OLIVEROS
SALES OPERATIONS, AMAGI GROUP
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 decisions and deliver better customer experiences.

Featured Testimonials

“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

“We, at Sell, always know exactly where our business opportunities stand, and have all of the information we need to follow up and close the sale.”

J.MAC BROWN
VP OF OPERATIONS, ADVENT

“Zendesk has been instrumental in allowing us to focus on the customer experience. Moving away from just being a service desk to looking at the customer experience collectively across the business has been a critical change for us to better leverage our relationships with customers.”

ALEX WOOD
HEAD OF CUSTOMER SERVICE, 1-STOP CONNECTIONS

“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
SPRING 2022
Customer Relationship Management (CRM)
Software Category

RISING STARS
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 solution. Commence products are sold and distributed in a dozen countries around the world servicing more than 30 unique industries. Ease of use, rapid deployment and the ability to customize the solution without programmer intervention has made Commence CRM ...

Featured Testimonials

“We needed a CRM solution that could track leads, sales and service tickets, generate e-mail marketing campaigns and provide extensive reporting. Commence CRM has delivered. The product is robust, flexible and the support staff has been exceptional.”

JERRY PERSSON
VICE PRESIDENT - CORPORATE SALES, CPS TECHNOLOGY SOLUTIONS

“This past year we have made substantial strides in using the Commence product to improve our internal business processes. The key however wasn’t just the products robust features and flexibility, but the extremely competent staff that Commence provided that were truly focused on addressing our needs. I would like to thank Commence Corporation for the excellent support we have received. We have been delighted to work with them.”

LILA BARNHURST
MARKETING ADMINISTRATOR, CONCRETE TECHNOLOGY

“Commence CRM has been a powerful, customizable and reliable solution. The product’s functionality, flexibility and support has enabled us to automate our business processes, become more efficient with managing customer relationships and improve both performance and quality control. Customer support has been excellent.”

BRET STAUNING
INFORMATION MANAGEMENT SYSTEMS

“We are thrilled with Commence and it serves us very well. We have customized the product around our very specific and unique business model and business processes, spread out over 10 locations and it has enabled us to compete effectively with companies that are much larger than us. A hearty thank you, to the entire Commence team, for your continued support and outstanding service.”

MIKE TONNESON
ARCADIA

TRUSTED BY

[Logos of various companies]

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category
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.

Total Customer References

50

Featured Testimonials

“Gold-Vision is vital for us. Viewing all our member engagement and interactions in one place is invaluable and has helped align sales and marketing activities across the business.”

EMMA SMILLIE
MARKETING MANAGER, OIL SPILL RESPONSE LIMITED

“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

“The software is incredibly intuitive and has offered our business features that we have waited a very long time for! Incredibly easy to use and configure.”

SAMANTHA RIDGELY
STRATEGIC PROJECT SPECIALIST, 5G COMMUNICATIONS

“More than satisfied with this system's capability, functionalities and ease of use. Most importantly, the hands on support from the Gold-Vision project team has been superb.”

MARIA MARTIN
MITSUBISHI MATERIALS

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MITSUBISHI MATERIALS  KEMPER  BURGESS  BRITISH CHAMBERS OF COMMERCE  AQUATEC

Customer Relationship Management (CRM) Software Category

SPRING 2022 CUSTOMER SUCCESS REPORT

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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.

Featured Testimonials

“Less Annoying CRM is fabulous, easy, effective, efficient, and affordable. I wish I had found it sooner! This is my 4th CRM, and I feel I have wasted time and money before I discovered LACRM. Now I’m home! The videos were so helpful as well as fun, the assistance has been spot on, and the CRM has everything I need for a small and growing business. I seldom write reviews, if ever, so that should say something about how pleased I am.”

T. MARNI VOS
T. MARNI VOS KEYNOTE SPEAKING

“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 friendly. You will be up and running the same day you start your free trial!”

KIRK BARRY
VERDANTIS ADVISORS

“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

“I 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 and prospect info is with me wherever I am! Thank you LACRM for saving me quite a bit of money and giving me a system that is easy to use.”

SHARON HERMAN
SILVER KEY WEALTH MANAGEMENT

TRUSTED BY

Customer Relationship Management (CRM) Software Category
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.

33 Total Customer References

Featured Testimonials

“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.”

JOHN CONNER
BREAKING THE BARRIER

“Right off the bat, the compatibility with QuickBooks impressed us greatly. Tracking cases, quotations, and customer follow-ups is also effortless through the use of activities and opportunities. Would highly recommend!”

DYLAN HANNA
GRAVITY SOFTWARE

“Method is central to our success as a client accounting services firm. Only Method provides the customization functionality and QuickBooks sync that both power our firm's internal processes and enable unique automation in our client engagement.”

LAURA REDMOND
TRAINER, CLOUD CONSULTANCY LLC

“Method is one of the best tools made specifically for QuickBooks users. If you’re already using QuickBooks, it’s a no-brainer to also use Method.”

KAYLA PRUSINSKI
SAVVY BIRD CONSULTING

TRUSTED BY

Customer Relationship Management (CRM) Software Category
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 more!

Featured Testimonials

“NetHunt perfectly fills in the gap between G Suite and our company processes. With NetHunt I can organize my company processes in a structured and orderly manner without ever leaving my Gmail. It is a flexible tool that goes beyond a traditional CRM; you can use it for multiple processes, e.g. sales, hiring, customer support. [The] NetHunt support team lead by Anastasia is awesome. She responds fast, actively understands, and provides solutions to my business problems. Otherwise, she brings up suggestions to the team for product improvement.”

Scott Ng
Co-Founder, OneThreeOneFour

“The NetHunt team has done a really good job with user experience and workflow. NetHunt simplifies my job in so many ways. It finds the perfect balance between features and simplicity.”

Andy Kieffer
Founder and CEO, Agave Lab

“Extremely easy to set-up and get going, no complicated training, and supremely flexible. Our Gmail inbox is now so much more than just an inbox, it is a collaborative space where information can be shared by and with anybody who might need it. Full customization gives us total control and the NetHunt team has been an absolute pleasure to work with!”

Eran Gal
CEO and Co-Founder, XORCOM Ltd

“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
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 solution. OpenCRM is also highly customisable meaning our cloud-based CRM solution works for YOU, not the other way around!

Featured Testimonials

“OpenCRM are friendly, professional, and a pleasure to work with. I would highly recommend; the team are available round the clock and offer amazing one to one support during working hours, so you are never alone if you have any question or need to amend something.”

OLIVER MURRAY
BIKE FOR GOOD

“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.”

ANNA ESSLEMONT
THE MANAGEMENT CENTRE

“We now have a CRM that is tailored to exactly what our organisation needs but at a reasonable price. On top of this, OpenCRM is easy to use, intuitive and the customer support team is always available to help.”

LAURENCE GEORGIN
UNIVERSITY OF SOUTHAMPTON

“OpenCRM has taken the sting out of Project Management and has streamlined our reporting processes to just the click of a button. The best part for us, is that we can customise it and change it when we want, without losing any functionality.”

VEE MAPUNDE
NIHR CLINICAL RESEARCH NETWORK

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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.

**Featured Testimonials**

“With Soffront’s easy to customize integrated CRM suite, we felt Soffront offered us the best ROI for our needs. Now, when our site managers are out doing building inspections, they have access via their iPads to the Soffront CRM and I get reports in real time. I can keep an up to the minute pulse on the business and don’t have to wait for paper reports to be turned in at a later time or have them come into the office to turn in their work.”

**HARRY TOSOUNIAN**

President, Gibbons Maintenance, Inc.

“With Soffront’s speed and ease of implementation, combined with their integrated suite of products and highly competitive pricing led us to choose them over other CRM systems such as Zoho, Salesforce.com, and Maximize. We also found Soffront very simple to use.”

**DEBBY WEBSTER**

Owner and Consultant, Triskel Consulting

“Our biggest requirement was that the CRM system we chose had both contact center and sales functions, of which Soffront has both. Soffront’s customization features, we will automate remaining processes that are currently being handled manually. Automating these few remaining processes won’t only alleviate the ‘paper shuffle’, but it will also result in a central repository where we can easily review historical efforts and transactions all under each customer’s account in the CRM system. Further, we will be able to conduct additional analysis and reporting on critical metrics on problem areas with data that was not so easily accessible in the past.”

**MARK HERRINGTON**

Manager of Client Hardware Installation and Support, Central Service Association

“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
ABOUT WORKETC

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 ...

52
Total Customer References

Featured Testimonials

“WORK[etc] allowed us to monitor current customer activity in order to be proactive to customer issues which resulted in high adoption and positive reviews. These reviews and high adoption ensured our client was more than happy to give us more of their business.”

CORY MAYER
TIRE WIZARD

“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] 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

“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

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USEReady Resource Center
SocialWeber
MoorE Engineering Services
Boise State University College of Business and Economics
VRM Virtual Resort Manager

featured customers

SPRING 2022 CUSTOMER SUCCESS REPORT
Customer Relationship Management (CRM) Software Category

45
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.

132 Total Customer References

Featured Testimonials

“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

“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

“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

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