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Customer Relationship Management (CRM) Software Category

SPRING 2023
Customer Success Report

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Customer Relationship Management (CRM) Software Category

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

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

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.

2023 Customer Success Awards

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

act! · copper · Creatio · Freshsales
HONEYBOOK · HubSpot · insightly · keap
Microsoft | Dynamics 365 · ORACLE NETSUITE · pipedrive · Pipeliner
Sage CRM · salesforce · sugarcrm · SuperOffice
thryv

affinity · AgileCRM · aptean · Close
CRM NEXT · freeagent · Maximizer · nimble
Nutshell · ontraport · Pipeline · Unanet CRM by Cosential
vtiger · zendesk sell

Commence A Trusted Name in CRM · gold-vision · Less Annoying CRM · method
NetHunt · opencrm · SOFFRONT · Workbooks
WORK[etc]

* Companies listed in alphabetical order

2023

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

MARKET LEADER

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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.

129 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"I have always believed in CRM systems being an essential support for sales teams, when used in the right way. I have been very impressed with the range of tools that Act! can provide, and how it has been tailored to the individual needs of each of our sales teams. It has certainly made a significant contribution to our success."

GEMMA BORGERT
MANAGING DIRECTOR, PFM MEDICAL UK

"We chose Act! as our CRM solution not just because it's easy to use, but also the scope it offers us in terms of configuration. We're now opening around ten new accounts each year, a level of performance that's all due to Act!"

OLIVIER TARDIF
CO-MANAGER AND SALES DIRECTOR, MANESSENS

"We compared various systems and chose Act! CRM because it's extremely customizable and also incredibly userfriendly. In less than half a day you can get a handle on the entire system."

RONALD DEN TOOM
BUSINESS DEVELOPMENT MANAGER, KH ENGINEERING

"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

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ABOUT COPPER

copper

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

177 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"We felt a lot of pain from not being able to see or understand our customers. So that really drove us to a CRM—but it was Copper's ease of use and implementation, and the Chrome extension that made us decide to build the business on this platform. Copper has played a big role in us growing our business and brought us tremendous organization and simplicity."

YOHANSE MANZANAREZ
EVP OF SALES, EPIC FREIGHT

"A few years ago, I started using a CRM. I took a look at probably around 10 CRMs, and none of them had exactly what I wanted. But then I found Copper and I saw how well it works with G Suite. I use G Suite for everything so I thought to myself: this is clearly the right CRM for me."

ANDREW CATON
INFORMATION TECHNOLOGY BUSINESS, RE/MAX

"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

"We are huge fans of ProsperWorks. By layering into our gmail and Google Apps, ProsperWorks streamlines the data entry for CRM."

BRAD MURPHY
FOUNDER, SEISMIC

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ABOUT CREATIO

Creatio

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

136 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"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

"We believe accurate data should be at the heart of strategic decision making, and this is why Creatio is our CRM choice."

ABBY MARTIN
DIRECTOR OF PROCESS MANAGEMENT, HEALTH E(FX)

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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.

150 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"The overall experience with [Freshworks CRM] has been good. It helps us keep track of the entire sales process in one single platform. The best part is, when a team uses the CRM, we have clear visibility to who is reaching out to which prospect. And, there is no duplication of leads as well. The CRM brings in transparency, thus ensuring no two salespeople reach out to the same prospect/customer at any time."

ANJAN PATHAK
CO-FOUNDER AND CHIEF TECHNOLOGY OFFICER, VANTAGE CIRCLE

"The implementation and onboarding for Freshsales was very helpful. The CRM is very user-friendly and intuitive, and it was very easy to set up. In fact, after we attended Refresh 18, the user conference organized by Freshworks last year, we became more involved in using the CRM actively. We learnt how to set up sales campaigns and workflows, and it is proving to be advantageous for us."

CARA HERBIG
GLOBAL ACCOUNTS MANAGER, IOTUM

"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

"With [Freshworks CRM], the interface is straightforward, we get deeper visibility into our sales pipeline and we're able to generate powerful reports—in one hassle-free package."

ANTONIO PALANCA
CHIEF EXECUTIVE OFFICER & CO-FOUNDER, HIVEXCHANGE

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ABOUT HONEYBOOK

HONEYBOOK

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

195 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"HoneyBook has helped my business grow by saving me a lot of time in terms of how I manage and keep up with my projects at various stages of engagement. It has also helped me elevate my UX for prospective clients—even on the go when I'm using the mobile app! It's definitely one of the best tools I have on boarded in my business so far. It has saved me countless hours in terms of creating invoices in a word processing platform, sending them out, fielding inquiries, etc. I have grown my bookings to 12-15 times what it was before signing up for HoneyBook."

TIFFANY
CAREER COACH AND TALENT DEVELOPMENT CONSULTANT, CAREER MAVEN CONSULTING

"I've been the booking mgr for our dj service for over 20 years, and this is by far - THE BEST system for tracking bookings, sales, leads and reports. Thank you!"

JENNIE HOLZMANN
BOOKING MANAGER, RECORD ENTERTAINMENT

"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

"HoneyBook has been a LIFE changer. HoneyBook has saved countless hours and helped me book more clients. Thank you for creating this amazing CRM!"

NICOLE PASTERNACK
PASTERNACK + CO.

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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...

1406 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"I have been in sales and marketing for over 12 years and literally have NEVER liked one of the sales CRMs that I have used, and then HubSpot came along and waived their magic sales wand and made a CRM that is actually sales-minded and makes SENSE. We chose HubSpot because we felt that their CRM could handle our leads coming in seamlessly without overwhelming us. Today, we truly feel organized and on top of each lead that comes through. As a result, we have watched our revenue reports grow and it is simply because sales are not slipping through any cracks."

CAYLIN WHITE
HEAD MARKETING BUFF, WP BUFFS

"We are big fans of the CRM as well because it gives us a clear view of the behaviour of our contacts in the funnel. We can see what they are visiting, what they are downloading, and we get notifications when they return to the website or open an email. I've sold CRMs in the past, and they are usually just a tool for managers, but the HubSpot CRM truly supports sales reps."

WOUTER GIJSBERTSEN
FOUNDER, BUREAU BRIGHT

"With HubSpot CRM's free marketing tools, we can easily learn which page visitors convert on — allowing us to do on-site page optimization, find out which blog posts are converting best, and learn which topics to write about."

MICHAEL HARF
OWNER, AQUAPRESSO

"HubSpot CRM has allowed us to track, manage, and organize our sales pipeline in a more efficient way than we ever thought possible."

MARK WALLACE
CO-FOUNDER, PARLOR SKIS, PARLOR SKIS

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DOORDASH VERACODE planful the population experts classpass

ABOUT INSIGHTLY

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.

235 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"We tried the other CRM options, the big solutions aimed at big companies. We were never satisfied, and we wondered whether there was a good fit out there for a small business. Then we found Insightly. It's easy to use, it's fast, and it fits the needs of SMBs."

EDUARDO FERNÁNDEZ
CO-FOUNDER, SHUTTLE CLOUD

"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.

"For us, Insightly is by far the best, most simple, yet sophisticated CRM solution. I'd recommend Insightly to SMEs that want a streamlined system. The integration with Gmail and Google Apps makes managing the sales process a breeze."

JUSTINE PERRY
MANAGING DIRECTOR, CARIAD MARKETING

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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.

158 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"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

"We use Keap—our secret to simple yet super-powerful automation that takes our operations, sales, and marketing to the next level."

KEITH MCLAURIN
FOUNDER, THE ZION GROUP

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ABOUT MICROSOFT DYNAMICS 365

Microsoft | Dynamics 365

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

2874 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Microsoft Dynamics CRM makes our sales personnel more effective by reducing the amount of time they spend on non-value-add activities and by creating more time to spend with customers. And sales managers can now focus more time on training and coaching in relation to high-impact customer activities. Both of these enhancements have a major impact on our revenue-generation potential."

JOE TARULLI
CORPORATE SALES DEVELOPMENT MANAGER, PYROTEK

"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

"Microsoft Dynamics CRM was chosen after analysing the market and the customers of this technology. Its user-friendliness, efficient deployment, associated cost and scalability are some of the aspects that weighed in. Moreover, BOND was chosen as the deployment partner after considering its functional competencies, experience and team."

JOÃO DE CASTRO GUIMARÃES
EXECUTIVE DIRECTOR, GS1 PORTUGAL

"Microsoft Dynamics CRM allows us to manage, monitor, and support our sales teams remotely. When we switched to the new system, it boosted the number of calls made by the sales team because the system is integrated and easy to use."

NICK CASSIDY
MANAGING DIRECTOR, CORE COST MANAGEMENT

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ABOUT ORACLE NETSUITE

ORACLE NETSUITE

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

1693 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"With NetSuite, we have more time to dedicate to growing our business instead of running our own IT shop and creating or developing new code. Having ERP, CRM and ecommerce in a single system with data access from anywhere has improved every aspect of operations."

JM VILLEGAS

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

IOANNIS TSAKATANIS
DIRECTOR OF FINANCIAL SYSTEMS, WORKABLE

"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

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ATLASSIAN BearingPoint CERIDIAN sugarfina lightspeed

ABOUT PIPEDRIVE

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...

230 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"The ability to completely customize the data fields and workflow gives me a tailor made CRM. Much different than my past experiences with these types of programs! The mobile app is just as functional as the desktop version, and even has a few little extras."

CHRIS WOLPERT
MANAGING MEMBER, GROUP BENEFIT SOLUTIONS

"Pipedrive is easy to navigate, easy to customize, and I love the at-a-glance dashboard. Also scheduling tasks and next steps is super simple. This is the CRM I've been waiting for."

KRYSTAL FERGUSON
GRAPHIC DESIGNER, UNKANNY DESIGN

"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

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ABOUT PIPELINER CRM

Pipeliner

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...

88 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"When looking for a CRM, you come across multiple options, however, finding something so rich in features and yet so adaptable and configurable to your business usually requires a full staff to maintain and support. Not the case with Pipeliner, with simple training and general intuition this CRM blows many others out of the water, plus it is a fraction of the cost. Our Franchise units simply love it."

EDUARDO PINZON
DIECTOR OF OPERATIONS, CRESTCOM INTERNATIONAL

"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

"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

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

HANNEKE GIELES
BUSINESS EXCELLENCE LEAD, PROWARENESS WEON GROEP BV

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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

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"Sage CRM allows us to contact a huge number of people likely to be interested and offer them a last-minute discount, which is better than having an empty seat. We can also slice and dice our customer data to create targeted marketing campaigns that appeal to different demographics."

DARRYN SHEWCHUK
DIRECTOR OF SALES AND MARKETING, ISLAND LAKE RESORT GROUP

"We opted for the Sage CRM solution upon considering its ease of use, administration and updating capabilities, and of course its quality to price ratio."

CHRISTINE TAILHAN
INFORMATION SYSTEMS MANAGER, L'UNION DES INDUSTRIES CHIMIQUES (UIC)

"Sage CRM is a very easy solution to customise, and it is simple to add alerts or specific fields to monitor the new processes deployed at the organisation."

EMILIANO FERNÁNDEZ MARÍN
DIRECTOR, CISET

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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...

1537 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"We can easily make changes across everyone's experience of the CRM as our business evolves and transforms. All we have to do is change a single dashboard, and thousands of employees get the benefit of updated capabilities. It's managed within one template, rather than across thousands of reports."

MARIANO SALATINO
VICE PRESIDENT OF SALES OPERATIONS, AVAYA

"Our CRM Analytics portfolio covers the full scope of Salesforce functionalities today. This includes Sales Management, Customer Support, Quality, and Services domains for more than 15,000 users worldwide."

CEM YÖNDEM
VICE PRESIDENT OF END-TO-END DIGITAL CUSTOMER RELATIONSHIPS, IT PLATFORMS, SCHNEIDER ELECTRIC

"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

"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

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Canon Ryder ALDO Humana Kellogg's

ABOUT SUGARCRM

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.

420 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"The use of our SugarCRM platform within our strong network of partners and external service providers is the highlight of our solutions. It provides a consistent customer experience regardless of how the customer interacts with 3Dconnexion, which has had a significant impact on our business."

RAIK BRAUNS
ONLINE MARKETING MANAGER, 3DCONNEXION

"The integration between InsideView and SugarCRM allows Insource to leverage social media and other real time data sources to our advantage, all in a simple to consume automated format. This merging of social and CRM system data gives us a competitive edge."

CHIP MEYERS
SALES OPERATIONS MANAGER, INSOURCE

"Our employees really appreciate that Sugar provides unified access to customer information. And we want to integrate task management, workflows, email marketing, and our ecommerce activities with the Sugar platform as well."

JENS NITSCHKE
CRM PROJECT MANAGER, KAUT-BULLINGER

"Thanks to SugarCRM's open and flexible architecture, we now have a CRM solution that perfectly supports our strategy and goals."

DAVID VAN GRONINGEN
GENERAL MANAGER, WELLAND

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Bitdefender · zenoss Own IT. · CBRE · SENNHEISER · Thomas Cook

ABOUT SUPEROFFICE

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...

158 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"The sales representatives can access SuperOffice via their smartphones (Pocket CRM) and use this data to conveniently arrange appointments with clients whilst out and about."

ROEL VAN DAM
SALES MANAGER, VSI (VURENSE SNACK INDUSTRIE)

"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

"Get it immediately if you do not have a CRM-system today! It is affordable, user-friendly and provides a good return on investment."

PATRICK NEUENDORFF
SALES MANAGER, LANTZ

"SuperOffice CRM Online helps us be more efficient every day. Its great interface and functionality makes it easy to use and fun to work with."

HEIDI MYRHOLT
CEO, HM MARKETING AS

TRUSTED BY

SABA · SHARP Be Original. · DENNIS EAGLE · Dräger · Eurofysica

ABOUT THRYV

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.

146 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"My favorite feature of Thryv is the social media scheduler. I post once, possibly twice a day. So, keeping up with being able to do that every day was really hard. Now I can upload them in advance and schedule out my social media."

KENDRA SWALLS
OWNER, PAISLEY LAYNE PHOTOGRAPHY

"I never thought we needed customer relationship management (CRM). However, Thryv put all of our client data, documents and correspondence in one place. It's easier to find everything and respond to client questions in a timely manner."

FRED
SMITH & SIMPSON FAMILY LAW OFFICES

"One of my favorite features about Thryv is that all the communication with our clients and our staff is housed within the software. That benefits the client because it creates continuity and it creates trust."

JULIE HOANG
OWNER, FIT180

"Thryv puts together my social media, text campaigns, and email campaigns all on one dashboard. With Thryv, everything is now consolidated and works fantastic."

RICK PARKS
OWNER, SEYMOUR OIL & LUBE

TRUSTED BY

Health Fit M.D. Aesthetics, Wellness & Weight Loss
Genco FLOORCOVERING
THE BODY BUILDING
The Diner NASHVILLE
THE RAILYARD

2023

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

TOP PERFORMER

featured customers

ABOUT AFFINITY

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,...

86 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"Affinity eliminated the friction in our relationship management and deal pipelines. The platform has fundamentally changed for the better the way we operate."

MARTIN PHILIPP
SENIOR MANAGER OF OPERATIONS SUPPORT, BDC

"We tried 3 market-leading CRMs but were never completely happy, and then we found Affinity. It's genius Intuitive, flexible, super smart. What an effective CRM should be."

DAN BOWYER
PARTNER, SUPERSEED

"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

TRUSTED BY

BainCapital VENTURES · USA TODAY · Entrepreneur · TCP TOUCHSTONE COMMERCIAL PARTNERS · ABACON CAPITAL

ABOUT AGILE CRM

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

68 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"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

"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

TRUSTED BY

CLICDATA · salesforce · Insperity · KELLERWILLIAMS REALTY · bowtie

ABOUT APTEAN CRM

aptean

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

39 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"[Aptean CRM] provides a higher level of information to our sales team, but it also provides additional information to the management team.[Aptean CRM] helps us plan our sales forecast and identify any existing sales opportunities—We can now develop sales strategies based on all the data we're collecting. CRM also gives us visibility on how prospects are progressing, how everything is moving. We didn't have that prior to..."

WALTER HEINE
DIRECTOR OF SALES, CONCORDE BATTERY CORPORATION

"The screens within [Aptean 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 [Aptean CRM] makes it easy for them to do so. In addition, we're looking forward to the upcoming release of [Aptean CRM] utilizing the new mobile..."

DAVE MANAHAN
CORPORATE BUSINESS PROCESS IMPROVEMENT DIRECTOR, STRONGWELL

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

MATT HOWELL
MANAGER OF INFORMATION SYSTEMS, NERCON

"Our favorite function of OnContact CRM is the ability to track the entire sales pipeline in order to see what we have coming in in terms of prospects and leads. In the past, we never had that – we didn't have a decent sales pipeline regarding what potential sales opportunities we had."

MIKE PALECEK
BUSINESS SYSTEMS MANAGER, QUICKCABLE

TRUSTED BY

RB Royal · PyraMax Bank · Olympus Group · Cleveland Steel Tool · ACI

ABOUT CLOSE CRM

Close

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

80 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"In my past CRMs, I had to export the data into a spreadsheet to get the reports I needed. It was unnecessary manual work. Close's reporting features are the opposite of that experience—they streamline our daily sales reporting processes, save us a TON of time and money, and help us motivate our teams."

ANDY FLOWE
HEAD OF OPERATIONS, BOARDWORKS

"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

"The email sequencing feature continues to reinforce what Close has been perfecting from the beginning. Which is to spend less time on administrative tasks and more time closing deals."

HOBI MICHALEC
CO-FOUNDER, LUMIS

"Close is the single best CRM, and I've used them all. It has increased my follow up rate by at least 50%. It's a salesperson's dream."

GRACE EDISON
SALES COACH, SUNNY LENARDUZZI

TRUSTED BY

NATUREBOX · Housecall Pro · ChartMogul · HRCovered · invoiceasap

ABOUT CRMNEXT

CRM NEXT

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...

50 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

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

"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

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

SANJAY GUPTA
PRESIDENT & BUSINESS HEAD – IT, KOTAK BANK

"With CRMNEXT we have been able to successfully bring all processes related to customer relationship including sales, services, campaigns, and performance management across all physical and digital channels on a unified agile platform."

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

TRUSTED BY

TPBank · BAJAJ AUTO FINANCE · AXIS BANK · HDFC BANK · TATA AIA LIFE

ABOUT FREEAGENT CRM

freeagent

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

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

ABI LICATINO
NEW HOME SALES COACH

"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

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

BRAD
VICE PRESIDENT OF SALES, ELECTRIC MOTORS AND PUMP, LLC

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ABOUT MAXIMIZER CRM

Maximizer

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.

167 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Maximizer CRM 12 has had a significant beneficial impact on lead generation and management. It also provides a very simple way of staying in touch with all our customers, and delivering first class customer service, which is very important to Minus 40 and Camsoft Solutions alongside Maximizer Software, has been an instrumental catalyst in the growth of our business."

STEVE DAVISON
MANAGING DIRECTOR, MINUS 40

"Maximizer CRM is a user friendly solution with functionality well suited to the recruitment industry. From a data capturing perspective and through the use of automation, we have seen a reduction in errors which has led to better data quality and faster, more accurate search results."

AMANDA DREYER
MANAGING DIRECTOR, THE RECRUITERS NETWORK

"Maximizer CRM is one of our key business tools. We love that we have one place to go for all our information, it has undoubtedly helped us streamline. We are huge fans of Maximizer and highly recommend it!"

LAURA MOULD
MANAGING DIRECTOR, SSG RECRUITMENT LTD.

"Thanks to Maximizer CRM, we are now able to effectively manage communications, contact details and transactions with our customers."

JAKOB DE VRIES
SYSTEMS ENGINEER, KONINKLIJKE AUPING

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Steele CAPITAL MANAGEMENT, INC. · ScotiaMcLeod® · WEST COAST Environmental Law · Prudential · BoatingWorld MAGAZINE

ABOUT NIMBLE

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

175 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"We ditched our CRM and replaced it with something different and way better. Nimble is a game-changer for us. It helps us manage relationships smarter. By doing the research and data entry for us, Nimble frees us up to communicate individually and meaningfully with each person we know. Instead of spending hours googling people and working in batches on a schedule, Nimble lets us work on-the-fly. As we think of something, we act on it, wherever we're working. As a reminder comes to us, we handle it. With Nimble, we're talking less—but getting heard more. (Can you tell I love this one?) Nimble has changed how we..."

MIKE WITTENSTEIN
FOUNDER, STORYMINERS

"I've been involved with a number of high growth tech start-ups and have evaluated many CRM systems. Nimble has proven to be the right tool to achieve our goals of qualifying prospects quickly, increasing sales effectiveness, managing sales activity and tracking, and scaling our business processes. In the last six months alone, we have doubled our sales team. Nimble's ability to automate sales processes, and quickly access background and social information has been key to making this happen."

OLIVER DENG
CO-FOUNDER, HEADHUNTR.IO

"I knew Native needed a CRM solution to better manage our customer and partner contact information and profiles, and to support our target marketing strategies. OMI recommended we use Nimble to help us to be much more strategic about managing our business relationships, engaging with our most important..."

BILLY BENNETT
OWNER, NATIVE CUSTOM STONE

"When I came across Nimble, I knew it was a good fit. I didn't need the bloated feature set of enterprise CRM applications. Having a really complete view of my customers and prospects — including a usable view of their social presence — was most important. With that level of intimacy, I could deepen and maintain..."

BOB APOLLO
FOUNDER, INFLEXION-POINT STRATEGY

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ABOUT NUTSHELL CRM

Nutshell

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...

62 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"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 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.

TRUSTED BY

CHESSER ROE TRULY REMARKABLE · bloomerang · CAFFÈ UMBRIA ARTISAN COFFEE ROASTER · BROTHERS LEATHER SUPPLY CO. GRAND RAPIDS, MI. · G.A. Richards Group

ABOUT ONTRAPORT

ontraport

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

82 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"What I really love about Ontraport is their fast, intelligent turnaround of any and all issues I've ever had. Not one question or problem I've had has ever gone unresolved! The software, the support, the knowledge base and the community of other users are extraordinary. I will never trade Ontraport for another platform — EVER!"

MATT JULL
AUTOMATION CENTRAL

"I love this CRM! Ontraport has changed the way I do business, and I recommend it to all my clients. The support is wonderful and the platform is powerful. You can set up any funnel you can dream up! Before Ontraport, I was overworked; after getting Ontraport I have so much more time. You won't regret making the leap!"

REBECCA BARNHEART
YOUR BUSINESS DESIGNER

"Ontraport not only provides the best CRM and marketing automation tools for small businesses, but now they've added an excellent education component. One idea alone, from one of the dozens of speakers, can literally double your business!"

JUAN MARTITEGU
MINDVALLEY INSIGHTS

"I simply cannot believe how powerful Ontraport is, especially in terms of client relationship management. The ability to know each and every touchpoint that clients/prospects have with my business is so important."

MATTHEW J. WATTS
FREEDOMPRENEUR BUSINESS ACADEMY

TRUSTED BY

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ABOUT PIPELINE

Pipeline

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

100 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"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

"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

TRUSTED BY

RENO · Carolina Thomas · Vermeer Southeast · ConnectPay People. Passion. Payroll. · Concentra

ABOUT UNANET CRM BY COSENTIAL

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...

64 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

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

DEBORAH BOYD
SENIOR ASSOCIATE, CORPORATE MARKETING, KCI TECHNOLOGIES

"One of the best things about Cosential has been the top-notch customer service. We are always able to get help from a real person and from someone that is extremely knowledgeable. Any issues we've raised have been dealt with immediately or in a timely fashion with good feedback in the interim on the status of the solution. Awesome customer service."

ROGER T. SMITH
VICE PRESIDENT, HOWELL CONSTRUCTION

"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 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

TRUSTED BY

SKANSKA · YATES CONSTRUCTION · CLANCY & THEYS CONSTRUCTION COMPANY · JE DUNN CONSTRUCTION · DPR CONSTRUCTION

ABOUT VTIGER

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.

62 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"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

"Vtiger is the most integrated CRM system and has helped us accomplish all of our sales, customer support, and accounting goals."

CHRISTIAN HAYES
CEO, LABSTATS

"Vtiger allows our startups to grow faster than ever with a powerful yet easy to use CRM."

ROBERTO MARANI
PARTNER, MILKY WAY VENTURES

TRUSTED BY

Russ Air ENVIRONMENTS YOU TRUST! · gb advisors · breezway · BAIRES · Dermatológica Clínica y Droguería

ABOUT ZENDESK SELL

zendesk sell

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

104 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"Sell has effectively centralized our sales processes, activities and information. It has totally transformed our pipeline visibility and makes sales easier for everyone at our company, from reps, to managers, to execs."

KRISTEN DEFILIPPE
MARKETING COORDINATOR, TURNER SURETY AND INSURANCE BROKERAGE

"Without a doubt, the Sell and Zendesk integration has improved our customer experience by aligning sales and support and providing them with the context they need to close more deals and delight our customers."

MARTIN CALZADA
TECHNICAL SUPPORT LEAD, KONTAKT.IO

"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

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UPFLUENCE DigiMapps Blue Reef GROUPON vimeo

2023

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

RISING STAR

featured customers

ABOUT COMMENCE

Commence
A Trusted Name in CRM

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

49 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"We use Commence CRM to pretty much run our entire business operations including Customer Management, Sales and Opportunity Management, Sales History, Forecasts, Lead Management, Reporting and more. What we really appreciate is the flexibility of the product where we can make changes as our business requirements grow. This would be extremely costly with other systems. In addition, Commence has delivered top notch customer support in several instances where we ran into some glitches caused by user error."

DAVE MARCHANT
OPERATIONS MANAGER, MAX TECHNICAL SALES

"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

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

KARA MOORE
FIBERPOL, INC.

"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

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California Employers Association · Hewlett Packard Enterprise · WeightWatchers · TRUENORTH THE CONNECTED AIRCRAFT · GenBio

ABOUT GOLD-VISION CRM

gold-vision

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

60 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"The Gold Vision team really listened to our requirements and provided a great demonstration of how the system could be configured to suit our needs. The system is flexible and configurable to work across sales, marketing, projects and finance."

KIM ASPINALL
DIRECTOR OF COMMERCIAL OPERATIONS, INSOURCE

"Gold-Vision is great and easy to use. It makes it quick and easy to create complex quotes, and the ability to easily view pipeline sales has been extremely helpful. Support from Jiggy and the wider team has been fantastic!"

MARK TAYLOR
DIRECTOR AT PARAGON DESIGN, PARAGON DESIGN JOINERY

"Our experience with Gold-Vision has been exceptional. They really took the time to understand our process and what we needed out of a CRM and ultimately designed something that exceeded our expectations."

LINDA MALMSTADT
VP OF SALES & MARKETING, PORTCO PACKAGING

"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

TRUSTED BY

KEMPER · Burgess SINCE 1790 · carlton · BROADSTONE · MITSUBISHI MITSUBISHI MATERIALS

ABOUT LESS ANNOYING CRM

Less Annoying CRM

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

34 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"I have been needing a CRM for many years but had difficulty finding one I could actually use. I laughed when I found LACRM because the others were truly annoying--too difficult to set up and learn to use and no support. FInding LACRM was a dream come true. Not only is it easy to use, flexible to my needs, and graphically appealing, but the customer support is by far the #1 most fabulous support I have ever had from any company ever. I know that I can always rely on Tyler to help me and that gives me a lot of confidence that I can use this CRM and get the results I..."

DEBRA LYNN DADD
DLD COMMUNICATIONS

"We want to give the LACRM team a two thumbs up! We are a small art therapy school, and your CRM has stopped communication with potential, enrolled and graduated students from falling through the cracks. We store everything from the first point of contact, class enrollment, grades, and payments through to graduation and beyond in your CRM. Since using LACRM, and getting your help with pipelines, we have tripled our enrollment! We love LACRM!"

CHERYL ANN WEBSTER
CANADIAN INTERNATIONAL INSTITUTE OF ART THERAPY

"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..."

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..."

KIRK BARRY
VERDANTIS ADVISORS

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ABOUT METHOD:CRM

method

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

43 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"I can't speak highly enough about Method and their team. The program is fantastic. It works out of the box and there is basically an unlimited number of customizations to do. And, my Business Solution Specialist, Farazeh, was amazing with the customization we did on the Estimate screen."

BRYAN DUTTON
ALLEGRO DESIGN CO

"I implemented Method for a sales team because I wanted something easy and intuitive for them to assign and manage opportunities, proposals, invoices, and payments. I didn't want sales reps in QuickBooks, so the integration was important — Method does that extremely well."

JOSHUA SROGE
CHIEF FINANCIAL OFFICER, FIRESTONE

"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

"As a sales rep, this is a very useful tool for me and my company. We use the activities to record all interactions with our customers to keep everyone on the same page. This is a great tool to help any sales team improve their sales opportunities."

MATT LUGO
FINANCESONLINE

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Guard Up! Inc. · Allegro Design Co. · Reliable Trading Inc. · GRAVITY SOFTWARE Better. Smarter. Accounting. · DIGITAL SIGNAGE RESOLUTIONS

ABOUT NETHUNT

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

52 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

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

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

KYRYLO ALEKSIEIENKO
BUSINESS ANALYST, HASKI

"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

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ABOUT OPENCRM

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...

52 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Having looked at a number of options we choose OpenCRM because of its simplicity and feature rich functionality. The system is easy to deploy and maintain. Critical to our decision was also that all data is held in the UK only."

STEVE LEES
BLUE SQUARE UTILITIES

"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

"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

"One key factor of OpenCRM was having the ability to pull and push data between OpenCRM and other applications."

RICHARD CAMPAGNA
55/REDEFINED

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ABOUT SOFFRONT SOFTWARE

SOFFRONT

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

59 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"With 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

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

WAYNE GARDELLA
VP, EXPORT-IMPORT BANK OF THE UNITED STATES

"Soffront CRM is an effective CRM tool with solid functionality that has helped us improve our sales performance cycle in a relatively short period of time."

HAL HARVEY
PRESIDENT AND CFO, CELERITAS GROUP

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SentricHR® Leica Geosystems AMERICAN SECURITY PROGRAMS, INC. GIBBONS maintenance inc. ActionCOACH business coaching

ABOUT WORKBOOKS

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...

139 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

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

CHARLOTTE WEST
XPS PENSIONS

"I've always found the Workbooks's support team to be fantastic: very helpful, very accommodating, very quick to answer questions. We had a lot of good trainings. The knowledge base is fantastic, with videos and documentation online. I think the customer services side of Workbooks has been exemplary."

FRAN KIDD
MARKETING AND BUSINESS DEVELOPMENT MANAGER, SHAW GIBBS

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

MATTHEW MORTIMER
SENIOR LEAD GENERATION MANAGER, LAW BUSINESS RESEARCH

"We have better visibility of what is in our pipeline and we can now produce quotations, orders and invoices from the same system. All of our supplier information can be accessed by the whole company, we can track our day-to-day communications with suppliers and we can produce supplier orders at the click of a button."

QUENTIN JONES
GENERAL MANAGER, MEGATECH

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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...

52 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"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

"This project actually had a lot of significant challenges. But with WORKetc, we just created one big project to house everything and we could set the schedule, the duration—keeping everything very organized was convenient and very easy."

CONNOR STEINWASCHER
AERIAL COVERAGE

"WORKetc is a key system that helps us make better decisions, daily. We've been able to handle more projects than we otherwise would, it keeps us all connected, and there's no doubt it saves us from a lot of mistakes and a lot of missed opportunity costs."

PETER FREEMAN
WOOF MEDIA

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