



CRM Software Category

WINTER 2026
Customer Success Report





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.

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 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

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.

2026 Customer Success Awards

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



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* Companies listed in alphabetical order



2026

**CRM
SOFTWARE**

MARKET LEADER





ABOUT ACT!



Act! Advantage is a full front-office CRM and marketing solution with new features and functionality that unite sales, marketing, and customer management in one intuitive, affordable platform to help small and midsize businesses stay organized, attract new customers, and build lasting client relationships. Act! Advantage introduces a range of integrated tools including Interactive Quotes, Website Chat, Accounting Integration, Appointment Scheduling, Project Management, Web Forms, and Online Surveys. These built-in capabilities reduce the need for third-party add-ons, offering a more streamlined...

160

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

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

BRIAN PASHKOFF
MANAGING PRINCIPAL, MGA, INC.

“I wouldn't consider any CRM supplier other than Act!. In our case, this system has been fine-tuned to create a whole range of interfaces between databases that used to operate separately in the past.”

RUURD SCHUT
INTERNATIONAL SALES MANAGER, FIB INDUSTRIES

“OccuVAX now has the powerful CRM tool it needed and which was actually in its hands all along. It wasn't that Act! was wrong for us, it was just that we weren't using it properly.”

TINA COLEMAN
DIRECTOR OF SALES AND OPERATIONS, OCCUVAX

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ABOUT COPPER



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

215

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“I love how quick and easy it is to categorize and classify our contacts in Copper so we can quickly segment by vertical for email marketing.”

MITCH BARLAS
PRESIDENT AND FOUNDER, BAGITO

“Copper is probably one of the most user-friendly CRMs. I learned how to use Copper just by tinkering around with it within the first week.”

ELLIZER CLUNE
ASSOCIATE COORDINATING PRODUCER, LIVEX

“Copper’s intuitive user experience allowed us to quickly adapt to its features and functionality without prolonged training periods.”

JOHN PAUL
VETERANS VALOR

“Copper’s limitation is really its user — it’s very, very customizable.”

EDSEL CAPILLANES
DIRECTOR OF OPERATIONS, AJ FINANCIAL PLANNING

TRUSTED BY





ABOUT CREATIO



Creatio is a global vendor of an agentic CRM & workflow platform with no-code and AI at its core. They help organizations automate customer and operational workflows achieving the fastest time-to-value and the highest ROI on the market. Millions of workflows run on Creatio daily, supporting thousands of clients in over 100 countries. Genuine care for their clients and partners is at the heart of their DNA.

226

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Creatio no-code CRM platform enables us to increase the productivity of our team, use customer data to improve customer interactions, and deliver operations excellence.”

PATRICK BRUNET
WEB DEVELOPER DIRECTOR, THIBERT INC.

“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

“Agovo have taken our processes and successfully mapped it to the CRM; it gives us 100% confidence of knowing where we are with all our claims.”

STEPHEN BUNTING
TECHNICAL DIRECTOR, FISCALE

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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...

239

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Great packaging and stationery has influenced my design aesthetic the most because those were the places I first noticed and fell in love with design. A beautifully and practically packaged item would make me open it so slowly, just to appreciate every sticker, postcard, and piece of branded tissue paper. A uniquely folded carton of milk was such a small part of my daily life, but it solved a common problem simply with design. And lastly, a clean, letter-pressed card made me feel like I knew the coolest, most put-together person just because of the font chosen on this smooth and sturdy piece of paper.”

IRIS ZHOU
MAGAZINE FOUNDER AND EDITOR, COMEBACK MAGAZINE

“HoneyBook email templates and questionnaires have saved me so much time and have created a seamless experience for the couples I serve. I know that so many things would be falling through the cracks without these templates.”

DREW BARRETT MEINECKE
OWNER/FILMMAKER, D. BARRETT STUDIOS

“HoneyBook is an amazing system. It has given me a tremendous advantage in the industry as a fast and easy way to book all my events.”

COREY GIPS
CHIEF EXECUTIVE OFFICER, PRESTIGE PARTY PRODUCTIONS

“Using HoneyBook helped to organize the paperwork into one place. HoneyBook even stopped a catastrophe from happening when I almost booked two weddings on the same day!”

JOHN ALDEN
OWNER, MOUNTAIN HOUSE ESTATE

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AMELIA CATHERINE & CO.



BIXBY + PINE



ABOUT HUBSPOT



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

1737 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“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

“We used to piece together a lot of our marketing programs with various tools across email, CRM, CMS, social media, and more. Although as our company continued to grow, we witnessed how much time and work it took to manage and maintain these tools, which took away from focusing on driving our actual growth. Before Content Strategy, we had data in disparate tools and no way to accurately tune our strategy, or know what to focus on.”

MATT OSBORN
SR. MARKETING MANAGER, APRUVE

“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

“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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ABOUT INSIGHTLY



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

242

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Insightly is perfect for the mid-market clients we serve: it offers full functionality, it’s easy to use, it has a unified platform, a modern interface, and great price point.”

AMY ANDERSON
CO-FOUNDER, WILD COFFEE MARKETING

“Insightly’s automation capabilities enable us to track each step of the journey, ensuring timely follow-ups and engagements.”

GEOFF BREMNER
CHIEF MARKETING OFFICER, BEND HEALTH

“Insightly is very easy to learn and use. It’s a great tool, and we’re excited to use it to drive future growth.”

KJELL VIDAR JØRGENSEN
IT MANAGER, UNGT ENTREPRENØRSKAP

“Insightly has really helped us hold our teams accountable and forecast our business more effectively.”

CORY CRAIG
ANALYST, MEDICONNECT

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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.

178

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

“I didn’t know what a CRM was, but I acted like I did, I quickly realized I needed to find out what a CRM platform is and get one.”

AMIT KAKAR
CHIEF EXECUTIVE OFFICER, AVALON PHARMACY

“Keap got me out of a government job that didn’t pay well, and now I get to help people see the world.”

SHANTERRIA EARLEY
TRAVEL DIVAS

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ABOUT MICROSOFT DYNAMICS 365



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

4187 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“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

“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

“With Dynamics 365, we’ve made it easier for patients to follow up with caregivers and for clinicians to know their patients—and deliver effective services.”

TOM PACEK
CHIEF INFORMATION OFFICER, INSPIRA HEALTH NETWORK

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COMMAVAULT



ASBANK





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.

2054 TOTAL CUSTOMER REFERENCES

VIEW ALL 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

“The flexibility that NetSuite gives us as a cloud-based system has been incredible. And with NetSuite OneWorld, we can look at the general ledger of each field office for a real-time view of where they are.”

HEALING WATERS INTERNATIONAL

“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

“NetSuite OpenAir's ability to integrate with our GL and CRM tools was a huge draw for us. We no longer have to spend time and effort on double entry of data in multiple systems.”

DUO CONSULTING

TRUSTED BY

JONATHAN ADLER **brillio** **asics** **ROKU** **LOVESAC**
Designed for Life Furniture Co.



ABOUT PIPEDRIVE

pipedrive

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

314

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Working with Pipedrive has been a breeze! The clean visuals give me a great look into my pipeline and I can easily update deals and opportunities as they progress. As our sales team grows, so does our pipe. And Pipedrive makes sharing and giving updates to one another so simple.”

MOLLIE HORAN
MIDWEST SALES DIRECTOR, GIMLET MEDIA

“Easy to use, great visual layout and I love how it automatically pops up to enter a follow-up task when I'm done. It's really changed how we handle leads.”

JESSICA REED
WEB DESIGNER, MEDFORWARD

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

NEHA SAMPAT
CO-FOUNDER, BUILT.IO

“Pipedrive is a dead simple sales CRM with very user friendly design. We've found it invaluable at Amicus.”

SETH BANNON
FOUNDER & CEO, AMICUS

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rented.

CallDrip

accentuate
web design and marketing

FALCON.IO

**mercado
livre**



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...

98

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

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

LUKE WITTENBRAKER
SALES AND MARKETING DIRECTOR, MACTECH ON-SITE

“With Pipeliner, we know exactly where we are, what comes next, and how we will end up at the end of this year. Can you show me any other tool that gives you such an excellent answer and insight into all your business needs.”

CHRIS SUDERGAT
CO-FOUNDER AND MANAGING DIRECTOR,
EVOLUTIONPLAN SYSTEMHAUS

“Pipeliner CRM revolutionizes operations at Ernest F. Mariani, a food & beverage equipment supplier with locations in UT, AZ, and WA. Enhancing convenience store equipment supply and streamlining sugar distribution from Phoenix.”

EROWYN SYMOLON
SALES MANAGER, ERNEST F. MARIANI COMPANY

“Pipeliner CRM gave us the foundation to build a sales and customer service strategy from the ground up—without complexity or breaking the bank.”

ERIC GOLDMANN
CHIEF COMMERCIAL OFFICER (CCO), ESP FACILITY SERVICES

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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.

336

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Another one of our objectives was to have a CRM web self-service portal for our customers to enter service requests, without having to call us on the phone.”

RYAN TODD
IT MANAGER, TELAID INDUSTRIES INC.

“With Sage CRM we have achieved better coordination of our customers' sales efforts, as well as automating the process of generating leads.”

MIGUEL ESPINET
DIRECTOR, LEAD SOLUTION

“Sage CRM gives us a real quick overview of where we're at and where we're going. It's absolutely excellent software.”

DENNIS LEVAN
IT MANAGER, THERMO-TWIN INDUSTRIES

“Handling time with Sage CRM is only a maximum of two days. Our service is better and the customers are happier.”

ERICH NATTERER
OWNER, JAMARA E. K.

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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...

2018 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Five years down the road, package lockers are absolutely going to be in every new community. And if they're not, residents will be asking for them, With the help of Salesforce, we're confident that the majority of these will be from Package Concierge.”

GEORGIANNA W. OLIVER
FOUNDER AND CEO, PACKAGE CONCIERGE

“Marketing Cloud makes it a lot easier for us to stay in touch with our customers. It really allows us to hone into that moment, in their preferred channel, and deliver something that's relevant for them.”

CHRIS WALKER
ASSOCIATE VICE PRESIDENT, ENGAGEMENT
MARKETING, HUMANA

“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

“Salesforce is the premier go-to tool for our entire ecosystem.”

RAJIV SHAH
CHIEF EXECUTIVE OFFICER, NARSEE MONJEE INSTITUTE
OF MANAGEMENT STUDIES

TRUSTED BY





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.

474

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“We see 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

“The main goal was to get a global solution that combined e-commerce, CRM, and logistics into one package that everybody could standardize on. With SugarCRM and Synolia, we accomplished that and more.”

PIERRE FREDET
GROUP DIRECTOR FOR DRY OUTLETS, COCA-COLA ENTERPRISE, COCA-COLA ENTERPRISE

“We didn't want the sales team to have to change successful work practices in order to adapt to a CRM system. So, with the flexibility of SugarCRM and REDK's expertise we found our solution.”

LUIS ORTIZ
SALES DIRECTOR, GRUPO EL DERECHO, GRUPO EL DERECHO

“With Sugar, we now have a 360-degree view of our customers worldwide. The CRM has become essential for our sales team.”

LARS OHLSSON
TEAM LEAD CRM AND PRICING, WIELAND ELECTRIC

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Agriconomie.com





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...

167

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Our SuperOffice CRM solution has streamlined our contract management processes, reducing churn and enhancing customer acquisition by providing actionable insights.”

VINCENZO DE MATTEO
HEAD OF SALES AND INDIVIDUAL MARKET
DEVELOPMENT, GGEW

“SuperOffice CRM has not only enabled us to work better, but we can also do more in less time. We wouldn't be wrong to say that we have gained 25% additional efficiency due to this.”

MARIEKE VAN LEEUWEN
PANASONIC

“SuperOffice CRM is now the brain of CASEA. It protects our corporate values, reveals new business potential and creates precious added value.”

CARSTEN KETTELER
MANAGING DIRECTOR, CASEA GMBH

“SuperOffice CRM equips our sales team with information that deepens their understanding of the challenges customers face.”

RICHARD HORNSBY
COMMERCIAL MANAGER, SHARP

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ABOUT THRYV



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

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TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Our market share has increased to nearly 40% of the Tasmanian insolvency market and that was as a result of a combination of direct marketing and also having that digital presence.”

BARRY HAMILTON
HAMILTON CALVERT ADVISORY

“Our presence online has now changed completely. We’re pretty excited about the future because Thryv opens up so much more.”

PAUL PERNA
BASE METAL RECYCLERS

“Thryv brings huge value in terms of efficiency and the ability to communicate with your client base – from one platform.”

SANJAY NAMBURI
SOUTH AUCKLAND DENTAL

“I love that fact that it’s given me more freedom to actually do what I need to do in my business.”

JO EDWARDS
STATEWIDE SKYLIGHTS

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2026

**CRM
SOFTWARE**

TOP PERFORMER





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,...

160

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“We have a dedicated support Slack channel with an AI chatbot to answer any questions from our users that includes all documentation about A4S. we also use that communication channel to share use cases with videos of power users.”

ENRICO ROBLES DEL RIO
DIRECTOR OF DATA ANALYTICS, ENDEAVOR

“Notetaker has been a game changer for us. With the sheer number of meetings we take, it's impossible to attend everything. Now, we can send Notetaker to meetings we can't join and still get all the insights.”

MIKE TITKOV
INVESTOR, TELUS GLOBAL VENTURES

“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 is structured specifically for a relationship-driven industry like consulting.”

CHARLES DE SEGUNDO
PARTNER, IMPACT DELTA

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.

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TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“In short, this is the best CRM platform I've ever used. Between the tagging system, workflow engine and API, this system has the ability to do marketing automation better than any other system I've worked with. The timeline makes it intuitive to keep track of customer contact points. The integration with IP phone systems means that costs are kept low. I have already recommended it to several of my clients and will follow up to ensure that they use Agile. Agile CRM is, quite simply, the correct choice for small business.”

BEN INKSTER
BOWTIE WEBSITES

“Agile CRM and RingCentral have afforded me the ability to utilize my time in a more productive way and think more strategically about how to grow our business.”

TIM MAYNEORD
CHIEF TECHNOLOGY OFFICER, UCADO

“Agile CRM eliminates so much manual administrative work, that I can't even begin to calculate the resources and time that it has saved us.”

BRUCE BLACKWELL
CEO, CAREER STRATEGIES GROUP

“I like Agile more and more and very happy you are adding video to your YouTube channel. Thanks for the great support!”

CHARLIE D'ESTRIES
SCIBIZ INTERNATIONAL

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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.

90

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Close has been a game changer for our team. I love how you can send texts, emails, set reminders, create tasks, and schedule reach outs all in one place. It's absolutely up-leveled our team, our service, and our sales.”

ERIKA NEELEY
WOMEN ROCKING BUSINESS

“Close is perfect for someone like me, I'm not a Sales Ops sage, but I've been around the CRM industry since it started, and have probably used 10 of them. Close has no equal.”

ERIC KEOSKY
CHIEF GROWTH OFFICER, HOWND

“Close brought simplicity back—and with it, my enjoyment of selling. Plus, switching back to Close was an immediate 10x ROI for us.”

HARRIS KENNY
FOUNDER, OUTBOUNDSYNC

“Close has cut my management time in half.”

JONATHAN HINSHAW
DIRECTOR OF SALES, UGURUS

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AcePulse
Exploration for Winning at Work

ChartMogul

customer.io

DoctorBase
how patients refer

Five9



ABOUT FRESHSALES

Freshsales

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

156

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Freshsales lead scoring makes it easy to see the leads who are responding well and who can possibly convert to a deal. The social profiles being auto-enriched helps us prioritize deals and act accordingly.”

RAJATH KM
HYPERVERGE

“We love [Freshsales]. It's fast, easy and intuitive. Workflows specifically eliminate manual work for us, so my team can spend more time calling and onboarding our prospects and clients.”

BRUCE KAMM
CHIEF EVOLUTIONARY OFFICER, VIRTUALBARTER

“Freshsales has many features that can help small companies to grow fast with limited resources.”

ROBERT FRENZ
ENTREPRENEUR IN RESIDENCE, DOOZER REAL ESTATE SYSTEMS

“It is simple, easy to use, and easy to set-up.”

JON LAM
DIRECTOR OF FINANCE AND RISK, WINDMILL MICROLENDING

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ABOUT MAXIMIZER CRM



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

186

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“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 has improved our activity workflows and communications to our prospective clients, giving us significantly expanded reach, reduced resource requirements and increased our sales pipeline.”

CHRIS TATE
IT & PROJECT SYSTEMS MANAGER, CHERITH SIMMONS
LEARNING AND DEVELOPMENT

“I find Maximizer very easy to use. A very complete and simple view of all client data and notes inputted. The integration into Outlook is quick and easy for saving email transactions.”

MEGAN WENCKOWSKI
FINANCIAL ADVISOR AND INVESTMENT
REPRESENTATIVE, HARVEST WEALTH

“With Maximizer, we’ve moved from spreadsheets to smart insights — and that’s changing the way we do business.”

CHRIS HARRISON
BUSINESS MANAGER, HEIDELBERG MATERIALS
CONTRACTING





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...

210

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

"Nimble's relationship building software allows me to look for other conscious leaders in conjunction with LinkedIn and find folks based on their group affiliations, enabling me to seek alignment."

CHRISTOPHER KING
FOUNDER, KING CONNECTIONS

"Nimble is extremely easy to use and concentrates on your contacts, communications, and calendars. This is 90% of what salespeople should be focused on!"

CRAIG M. JAMIESON
MANAGING MEMBER / OWNER, ADAPTIVE BUSINESS SERVICES

"With Nimble, you can easily connect with leads, calendars, and social networks, among other great features that solve all of your business difficulties."

PARVEEN MALIK
MANAGING DIRECTOR, ICREON

"Nimble is easy to use and helps me complete tasks quickly. Integration with LinkedIn makes data entry fast and automated."

MICHAEL METCALF
MANAGING MEMBER, DEVELOPERS.FUND

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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...

86

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Nutshell has been very responsive to our questions, whether those questions are coming from me or from the folks on my team in Europe.”

ERIC MERLE
CHIEF COMMERCIAL OFFICER, GENOSKIN

“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

“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.

“It was super easy to get started in Nutshell. My team loves having all this information at their fingertips.”

MARIE FRANKLIN
DIRECTOR OF STRATEGIC DEVELOPMENT, CAFFÈ UMBRIA

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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.

107

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Ontraport allowed us to migrate our membership portals to be a lot more directly integrated with our CRM, saving us a lot of time and enabling us to use automations that tie directly into the website to help improve productivity.”

JARREN CRIST
MEMBERSHIP AND SYSTEM MANAGEMENT, PSMA CONNECT

“Ontraport became an essential partner in helping us scale EMS Corps from a single program to a national model. Their ability to understand our needs and provide a flexible, scalable platform that is always evolving was and still is — a key to our success.”

JEFF METCALFE
CHIEF OPERATING OFFICER, EMS CORPS

“Ontraport has enabled us to grow without the growing pains — giving us enterprise-level capability without needing an overly engineered ‘custom coded’ system.”

ANNA HETHERINGTON
CHIEF EXECUTIVE OFFICER, RESICERT

“Ontraport is the only platform you can do this with — there’s definitely no other tool like it. Ontraport is the most powerful business tool on the market.”

ADAM SCHNEIDER
ENVIRONMENTAL ADVANTAGE

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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...

108

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Pipeline CRM listened to what I was asking for and created a new feature and field for us, which was really cool. It was above and beyond what we thought could happen.”

CHRIS CARPENTER
VP OF SALES, XPRESSCONNECT

“It's a big project switching to a different CRM. Onboarding Services figured it out, as opposed to me learning it all first and then making a decision.”

SUZANNE CROISDALE
VP OF SALES, PREMCOM

“With Pipeline CRM, I have a truly mobile CRM experience and can work on the go.”

JONATHAN DARDEN
NORTHSTAR FINANCIAL INSURANCE SERVICES

“Thanks to PipelineDeals, we're up 147 percent revenue in two years.”

MICHAEL DIVINEY
SHAKER PAINTING

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ABOUT UNANET



Unanet is a leading provider of Cloud and On-Premise software for project-based organizations. Unanet delivers a purpose-built Project ERP solution with skills management, resource planning, budgeting & forecasting, time & expense reporting, billing & revenue recognition, project management analytics and dashboards, and integrated financials with AR, AP, GL and cost pool calculations. Over 1,000 organizations trust Unanet to maximize staff utilization, reduce administrative costs by 90%, improve invoicing by 10X, and support forward decision-making for improved...

178

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Unanet AE’s dashboards and analytics have been a welcome change for us. After 24 years on our previous system, we finally have the ability to create a clear view of our financial performance metrics with flexible tools that have brought our data to life. Unanet’s software has given us the ability to make informed decisions with insights we simply couldn’t access before.”

BRIAN WELCH
ESP

“Unanet has made us more efficient, and we are able to focus our activity and attention on managing and growing our business, rather than managing the actual transactions themselves. With Unanet, our profit margin improved by 4%.”

HUGH SHAW
CHIEF FINANCIAL OFFICER, VENTERA CORPORATION

“Unanet caters to government contracting their number one being DCAA compliance. What Unanet has is the ability to write your own rules and policies that you can enforce.”

LUSINE VELOSO
CONTROLLER, EDGEWATER SOLUTIONS

“Unanet has really impacted us in that it has helped us to be more efficient, the data that we need to do our jobs is all in one place.”

TIFFANY GIBSON
MARKETING MANAGER, DLZ CORPORATION

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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.

94

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“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

“Our search for a CRM system that could be customized for our business process ended at Vtiger. With Vtiger we have streamlined our entire business process.”

AVINASH YADUKA
DIRECTOR, KRISHNA PARK INFRACON

“Vtiger CRM has simplified PopUp-House's entire sales process starting from lead capture to close of sale.”

JACQUELINE BOINA
CRM MANAGER, POPUP HOUSE

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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 decisions and deliver better customer experiences.

145

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Zendesk’s solutions are very intuitive. With a simple and straightforward design, our employees found it easy to familiarize themselves with its capabilities. Zendesk’s support team is always there if we need them. Our partners at NewWave were very instrumental in the successful implementation. We wouldn’t have made it without them.”

MICK CHUNG
IT MANAGER, VIVOTEK

“We knew that what we would get with Sell is a partner who was understanding that we aren’t the largest sales organization in the world, but we’re a medium-size company that is growing rapidly. We need something to grow with us.”

EMILY JOHNSON
SENIOR DIRECTOR OF BUSINESS DEVELOPMENT, AVE LIVING

“Zendesk Sell is an easy to use solution that helps everyone collaborate on different accounts, and gives everyone visibility into ongoing activities and captures institutional knowledge, which is important especially as we’re growing really rapidly.”

ROGER DRAKE
APPLICATION SPECIALIST, STANDARD BEVERAGE

“Zendesk Sell has an intuitive user interface, competitive pricing, excellent security, and a variety of must-have features for a small sales team.”

CHARLES GOODMAN
CLIENT MANAGER UK, COINJAR

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2026

**CRM
SOFTWARE**

RISING STAR





ABOUT CAPSULE

Capsule

Capsule was launched in 2009 following the founders' frustration with existing CRM services that were either overly simplistic or far too complex for most businesses. They believe the value of a modern CRM lies in the ability to help businesses stay organized, know more about their customers, build strong relationships, and to make the most of sales opportunities, all while minimizing user input. They built Capsule to deliver on these values and today Capsule is used by thousands of businesses of all sizes all over the world.

78

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Thanks to Capsule, we can identify, rank, and then prioritize channel referral partners. By quickly adding financial opportunities, we assign both qualitative referral reach and quantitative dollar values to each Channel partner. We were able to add all of this in a single remote session. With Capsule being so simple and quick, it has given us reach to over 1 million US businesses that want help with China.”

ADRIENNE KOHLER
REGIONAL DIRECTOR, RED CIRCLE NETWORK

“In a nutshell, I love it! Everything I need in a CRM is included for an outstanding price per user Capsule CRM allows me to be more of an expert in my customers rather than an expert in CRM software.”

MARK LITTLE
CHIEF COMMERCIAL OFFICER, PHOTOSOUND TECHNOLOGIES, INC.

“Capsule was the most intuitive of all the CRMs that we tried and was quick to set up and roll out. The process was seamless, intuitive, and simple for the whole team.”

SEAN KERNA
FOUNDER, 360 WEALTH MANAGEMENT

“The simplicity of the system is also a huge bonus. New members of staff can quickly get to grips with the system and understand how we use it.”

HOLLY HINTON
MANAGING DIRECTOR, WEB GODDESS

ATTRACTLY

NVOY
TECHNOLOGIES

TRUSTED BY

LIQUONA

HASBEAN

LAING
RUSSELL



ABOUT CENTRAHUB CRM



CentraHub CRM is a fully customizable integrated sales, marketing, and service suite that automates lead generation and support for growing businesses. CentraHub is a digital transformation solutions vendor that provides vertical-specific business process automation suites, CRM, HCM, and Studio platforms that allow the metamorphosis of business landscapes.

50

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“CentraHub CRM is a smart solution that has revolutionized our logistics operations. Its user-friendly interface robust features and automated processes have significantly improved our operational efficiency and customer satisfaction. We highly recommend it to other logistics customers.”

HIMA PARVATANENI
CHIEF EXECUTIVE OFFICER & DIRECTOR, NAVATA
SUPPLY CHAIN SOLUTIONS

“CentraHub offers a complete business solution with seamless integration capabilities. The integration ensured our business workflows and data sharing became seamless across multiple departments and systems, eliminating data duplication. Also, it is one of the few CRM vendors who provide local support.”

JAMES TAVENDALE
HEAD OF IT & SYSTEMS, THE MAINTAINERS (MFS)

“CentraHub CRM is highly customizable and was seamlessly integrated with our backend ERP - Focus 8. We now have a better flow of information from ERP to CRM and vice versa, which is one of the key reasons for us choosing CentraHub, something the other vendors couldn't provide us.”

DEBORAH GAY A. DAYRIT
CEO, AVENUE ADDRESS

“The Centra CRM software has given us a centralized view on your business and control everything we do.”

ALAN SAKR
GM, CONSENT GROUP

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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...

53

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Commence CRM’s has been a powerful, customizable and reliable solution. The products 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.”

BRETT STAUNING
INFORMATION MANAGEMENT SYSTEMS, INFORMATION
MANAGEMENT SERVICES

“Commence CRM is an excellent product coupled with a team of highly experienced sales, marketing and service professionals that have helped us get the maximum value from their software. I have worked with the company’s CEO who is one of the most knowledgeable professionals in the CRM market. Highly recommend.”

LONNIE L. SCIAMBI
PRESIDENT, VALUE FORCE, LLC

“We have realized tremendous value from Commence CRM. Its comprehensive and so flexible that it has enabled us to make modifications to the software to meet our unique and changing business requirements. We are very happy with the product and the support staff has been excellent.”

RANDY RICHTER
FOUNDER AND CEO, RICHTER & COMPANY

“Commence CRM provides a unique combination of power and ease of use. It offers robust functionality and can be easily tailored to meet unique business requirements. Customer support has been excellent. We highly recommend the product and the company.”

PETER FORSTER
MANAGING DIRECTOR, GATEWAY PSYCHIATRIC

TRUSTED BY





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...

67

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Gold-Vision have been the perfect partner for our configuration and implementation. The support we have received has been second to none – they are always at the end of the telephone if we need any guidance or advice. The training we have received from Rohan has been very thorough which has really helped ensure maximum adoption of the system.”

JESSICA RUSSELL
MARKETING MANAGER, SCHENK UK

“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, PARAGON DESIGN JOINERY

“Gold-Vision aligned our sales and marketing and resulted in a hit rate growth on project success from 22% to 61% in the first year.”

CHRIS RHODES
MANAGING DIRECTOR, RHOCO ES LTD

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ABOUT KOMMO



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

73

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Kommo is a tool that our team actually enjoys and since we adopted it, we have not had to enforce or encourage adoption, it was organically adopted and quickly. From a management perspective, Kommo has helped us become coaches and mentor to our teams as opposed to just managers.”

JOHN GOMEZ
FOUNDER & CEO, CLOUDWAVE

“Kommo has been like a lifesaver for our business. We can see that Kommo will help us in the growth of our business as it's completely scalable.”

JOHAN NIEUWOUDT
SECRET NAMIBIA

“Kommo is customized for our needs and supports the different nature of our conversations with different types of clients.”

ALEX GUDILKO
CHIEF EXECUTIVE OFFICER, AJPROTECH

“My first impression was that Kommo is easy to handle, easy to put in new clients and track them.”

MARIUS HEYERDAHL
EUROPEAN SALES MANAGER, MARINETRANS

TRUSTED BY





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.

60

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Method is the engine behind our company. Everything we’ve done with Method has been customized to the way our business operates which has enabled us to scale.”

ALAN MISHKOFF
FOUNDER, GRANITE GARAGE FLOORS

“We were close to developing our own CRM before finding Method.”

ERIC CRESCIONI
DIRECTOR OF INFORMATION TECHNOLOGY, RELIABLE TRADING INC.

“The flexibility of Method is that you can use it anywhere.”

DAVE KOWCH
BUSINESS DEVELOPMENT MANAGER, SKY PRODUCTS

“With Method:CRM, my sales process is hyper-efficient.”

JOHN MORA
OWNER, GTM LANDSCAPING

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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...

73

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“We have been using Google Workspace services for many years, as all our business processes are managed through email. Therefore, having a CRM with Google Workspace integration is more practical for us. Initially, we used Streak, but it didn't deliver the efficiency we were looking for and didn't fully meet our needs.”

TAHIR UYANIK
DEVELOPER, DOYUK PROMOTIONAL PRODUCTS

“When leads reach the “payment received” stage, they automatically move to a designated folder and pipeline where account managers and accountants continue taking care of them. In this new folder their customer card changes to better reflect on the processes associated with the customer at that stage.”

ROMAN DRONOV
HEAD OF SALES, HURMA

“NetHunt CRM has significantly improved our efficiency and improved our knowledge of both the business and our clients. These improvements have definitely had a positive impact on our operations.”

EMYR THOMAS
FOUNDER, BON VIVANT

“I have worked with and implemented some of the best CRM systems available over the past two decades and this is by far the simplest and fastest to use.”

PAUL ASHLEY JENSEN
CHIEF EXECUTIVE OFFICER, THE LINKEDIN STRATEGIST

TRUSTED BY

karpattia

InSumStore
DESCARTABLES ONLINE

garden vision
by Invenire Design

epom
ad server

momenzo



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...

56

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

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

“OpenCRM have been great from start to finish, I am really pleased with our new CRM system and have received some great feedback from colleagues as they become more familiar with using the system.”

RHIANNA HARRIS
VARGUS TOOLING UK

“OpenCRM has helped us with email marketing, tracking opportunities and monitoring performance.”

OLIVER SINFIELD
THISTLE SCIENTIFIC

“OpenCRM will revolutionise our business.”

NICHOLE ROBERTS
ANNABEL'S DELICIOUSLY BRITISH

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ABOUT SALESMATE



Salesmate is an all in one cloud-based CRM that enriches customer interactions, boosts sales productivity and helps win more deals. Salesmate CRM provides an easy to use solution to simplify complex sales processes of startups, and, small and medium enterprises. Salesmate is a truly intelligent cloud-based CRM solution that benefits sales reps be more productive, increases their sales and engage deeply with their customers. With Salesmate, it got easier for businesses manage their pipeline, save time at all stages of the sales cycle and win new customers without breaking their back on...

75

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“Best CRM for me out the 15 I’ve tested. I have spent several days using Pipedrive, Salesforce, Zoho, Freshsales, Close, etc. and Salesmate is best out of all.”

ANDERS HANSEN
LYDSTUDIE

“Salesmate was recommended by a colleague. My industry is entirely different. Yet, We adapt quickly. I can’t explain how much it has improved my business.”

DAVID DEVITO
FOUNDER AND CEO, BAR-TINI ORLANDO

“Salesmate was simple, easy to adopt, and easy to configure. It gave us a clear overview of our sales process and helped us save time every day.”

LUCA FORMENTI
CO-OWNER & HEAD OF SALES, ELEVA

“Solid CRM for small businesses that are looking for an easy to use, yet impactful CRM.”

MIKE BARUGEL
FYT VIRTUAL ASSISTANTS

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ABOUT SOFFRONT SOFTWARE



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

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TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

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 to come into the office to turn in their work.”

HARRY TOSSOUNIAN
PRESIDENT, GIBBONS MAINTENANCE, INC.

“Soffront CRM has allowed us to be much more organized – we now have a global view of all outstanding issues and can more accurately monitor the status of numerous projects. Soffront CRM provides a cohesive, common interface for managing all parts of the IT organization.”

ANDREW GILL
IT MANAGER, ART.COM

“Narus purchased Soffront CRM several years ago to improve work processes in our engineering department. The customization capabilities of Soffront CRM give us the flexibility to easily adjust our processes as our business grows.”

RICHARD CASEY
SENIOR DIRECTOR ENGINEERING OPERATIONS, NARUS

“We chose Soffront CRM because of its easy integration and customization for all our departments.”

DAVID LEWIS
EXECUTIVE VICE PRESIDENT, SENTRICH

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PeakPerformance®

SentricHR®

Leica
Geosystems

euofins
mwg|operon

actionCOACH
business coaching



ABOUT WHITE CUP

WHITE CUP

While White Cup and Hookshot are new names in the industry, the platform is comprised of a combination of software from three sister companies: Compass Sales Solutions, MITs, and Tour de Force. In 2020, the three came together and rebranded under one company, White Cup, and one product suite, Hookshot. White Cup offers two integrated Hookshot products: Business Intelligence (BI) and Customer Relationship Management (CRM). Hookshot integrates with key business systems, like your ERP, to enable you to gather, analyze, and act on meaningful data tailored to your business goals and industry best...

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TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“What's nice about White Cup BI is that the roll-out is quite easy. From start to finish, it's quick--didn't even take a week to install. We were able to take the preloaded canned reports, get them to our sales reps, and they were able to run out and provide data to our customers that they had never seen before.”

LANCE MELNIK
IT MANAGER, VESCO OIL

“White Cup's CRM really helps our sales team to manage their time better and organize their week. It's really easy to fly around White Cup's CRM on the web, and our sales team also uses the mobile app to look up contacts and other specifics when out in the field.”

VANESSA BRAY
SALES ADMINISTRATOR, HARTFIEL AUTOMATION

“It was so great to see a CRM for distributors that emphasized business intelligence. It just became more and more evident that White Cup really understood our industry and truly have expertise in this space that goes beyond the software.”

KATIE CROWL
CRM ADMINISTRATOR, LEPCO

“White Cup Pricing provided us with data that highlighted where we had been charging too much or not enough based on our new matrices and created an accurate global price matrix that we really needed.”

CORPORATE PRICING MANAGER
HVAC AND PLUMBING DISTRIBUTOR

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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...

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TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“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

“I’ve launched a lot of CRM software in my time and moving always feels bit too complicated. I think the stand-out benefit of Workbooks for me, is the implementation process. It was a very personal process. The team understood our organization and I felt like we had a lot of customization.”

NICHOLAS JOHNSTON
CHIEF EXECUTIVE OFFICER, ECC

“Workbooks makes life easier for everyone at IFIS. We have fewer manual processes, which not only reduces the potential for errors but also saves us significant amounts of time.”

MARIA SEVERINO
HEAD OF FINANCE, IFIS

“Workbooks is definitely valuable to us, both in terms of the growth in the database and in terms of its management. It generates response, which generates revenue.”

MATT MIDWORTH
COMMERCIAL DIRECTOR, APL MEDIA

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ABOUT WORKETC



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

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“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

“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

“WORK[etc] helped us keep everything in one place and allowed us to look bigger and more professional through the use of a client login on our homepage and that resulted in increased sales. I’ve finally been able to buy a new car!”

SCOTT MOORE
PRESIDENT, MOORE ENGINEERING SERVICES

“WORKetc gives us complete project visibility. It’s easier to track billable hours and see how productive my team is.”

GILLIAN STATHAM
PERFORMANCE HR

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EAGLE VISION