

Sage CRM The Forrester Wave™: CRM Suites for Midsize Organizations, Q1 2015

Sage CRM Opinion Brief



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Executive Summary

Sage CRM ranked as “Strong Performer” in The Forrester Wave™: CRM Suites for Midsize Organizations, Q1 2015

The Q1 2015 Forrester Wave evaluation of customer relationship management (CRM) suites for midsize organizations was published on March 25, 2015. The report, authored by Forrester Analyst Kate Leggett, evaluates the 10 most significant CRM suites on the market today for midsize organizations. Sage CRM was evaluated against 9 other solutions namely Aptean Pivotal CRM, bpm'online, Infor CRM (formerly known as SalesLogix), Maximizer CRM, Microsoft Dynamics CRM, NetSuite, Salesforce, SAP Cloud for Customer, and SugarCRM.

Sage CRM has retained its **Strong Performer** ranking with strong market presence in this Forrester Wave.

Forrester notes that Sage CRM offers “*strong core SFA and integration to back office products*”. This is an important point as Forrester also highlight how “*‘Out-of-the-box’ front- and back-office integration have become increasingly important*” and how “*midsize organizations, with sparse technology management expertise, often leverage pre-integrated front- and back-office solutions from a single vendor.*”¹

Additionally, Forrester has recognized that Sage CRM's primary strengths include “*strong reporting and core sales force automation capabilities — including sales process management, team, and territory management.*”

They also call out Sage CRM's “*sound lead management capabilities and sound product roadmap that focuses on delivering modern user experiences, enhancing social and mobile capabilities, and providing analytics to better surface business insights.*”

Sage CRM is designed with the needs of small to midsize companies at its core, ensuring it remains affordable, adaptable, insightful and easy to use. We are pleased that Forrester highlight that “*Sage CRM is a good fit for midsize organizations that use other Sage back-office*

¹ Source: The Forrester Wave™: CRM Suites For Midsize Organizations, Q1 2015 by Kate Leggett, Forrester Research Inc., March 25, 2015.

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products and have limited technology budgets yet require a usable solution that offers strong sales capabilities and delivers workflows and insights to make an organization more productive.”

Forrester also highlighted that Sage CRM “*has a very attractive price*” which is important for value-conscious small to midsize companies looking for a cost effective solution that offers a low TCO.

In summary, Forrester recognizes Sage CRM for its:

- Strong core SFA and integration to back office products
- Strong reporting and core sales force automation capabilities, including sales process management, team, and territory management.
- Sound lead management capabilities
- Sound product roadmap that focuses on delivering modern user experiences, enhancing social and mobile capabilities, and providing analytics to better surface business insights
- Very attractive price

Forrester concludes that “*Sage CRM is a good fit for midsize organizations that use other Sage back-office products and have limited technology budgets yet require a usable solution that offers strong sales capabilities and delivers workflows and insights to make an organization more productive.*”²

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² Source: The Forrester Wave™: CRM Suites For Midsize Organizations, Q1 2015 by Kate Leggett, Forrester Research Inc., March 25, 2015.

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About the Forrester Wave™

Sage CRM is categorized by Forrester as a CRM suite for midsize organisations (organisations with 250 to 999 employees). According to Forrester, examples of CRM suites for midsize organizations include:

- Aptean Pivotal CRM
- bpm'online
- Infor CRM
- Maximizer CRM
- Microsoft Dynamics CRM*
- NetSuite
- **Sage CRM**
- Salesforce
- SugarCRM

Forrester notes that vendors in this category offer a solution suitable for midsize organizations or divisions of large enterprises. Forrester states: *“Midsize organizations and divisions of large enterprises are typically more technology-management and budget-constrained than large enterprises. Therefore, some vendors we included offer CRM solutions that provide quicker deployments and lower total cost of ownership as well as more out-of-the-box support for midmarket businesses compared with larger organizations.”*³

Forrester evaluated each vendor in the report against 95 criteria, categorized into the following three areas:

Current offering: Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current product offering. Forrester look at the strength of each vendor's products across a spectrum of CRM capabilities, including sales force automation, marketing automation, customer service, field service, eCommerce, business intelligence, customer data management, technology, and architecture.

Strategy: A vendor's position on the horizontal axis indicates Forrester's assessment of its strategy. Forrester assess the strength of each vendor's product strategy and product vision. They assess the application ownership experience, cost, and corporate strategy of each vendor.

³ Source: The Forrester Wave™: CRM Suites For Midsize Organizations, Q1 2015 by Kate Leggett, Forrester Research Inc., March 25, 2015.

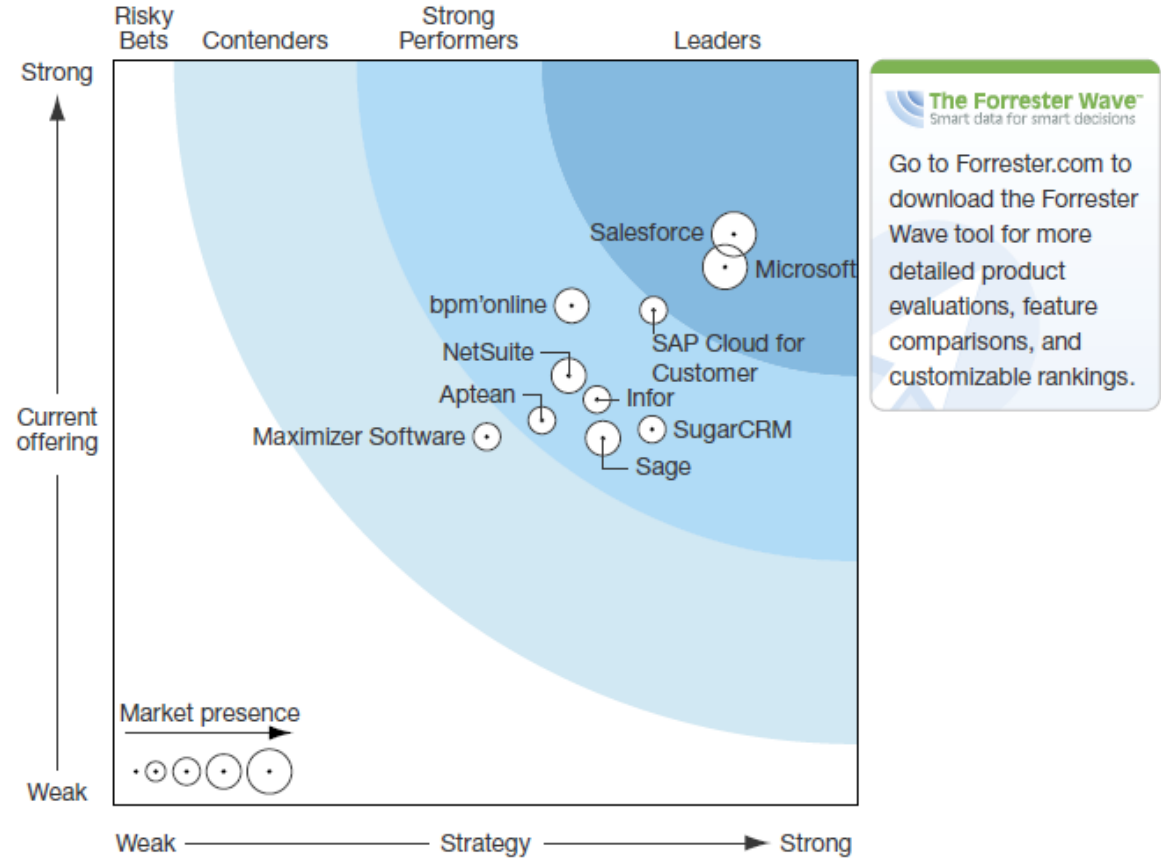
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Market presence: The size of each vendor's bubble on the chart indicates its market presence. Forrester gauge the size of each vendor's customer base and evaluate the depth of human and financial resources available to enhance its products and serve its customers.

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Figure 1. The Forrester Wave™: CRM Suites for Midsize Organizations, Q1 2015



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Additional comments and opinions on Sage CRM

While Forrester call out Sage CRM's strong sales force automation capabilities, including sales process management, team, and territory management, the report also mentions that Sage CRM falls short on *extended* SFA capabilities such as commissions and renewals management.

- In handling such comments, please note that such advanced capabilities are generally not a core SFA requirement of our target market, but that extended capabilities can frequently be delivered by Sage CRM Business Partners or via third party solutions, for example Enbu's CRM Contract Manager, Orbis Software's Task Centre and Eureka Solutions' Contract Manager. We continue to focus our efforts on building SFA functionality that best meets the needs of our target market, for example the Business Accelerators for Sales delivered in Sage CRM 7.3.

Additionally, while Forrester highlight Sage CRM's sound lead management capabilities, they also note that it falls short on broader marketing capabilities such as offer management and event management. In addition they mention that Sage CRM offers limited capabilities for customer service, eCommerce and field service.

- Again it should be stressed that extended capabilities can frequently be delivered by Sage CRM Business Partners or via third party solutions, for example Enbu's CRM Event Manager or Service Management Solution, Sellmore's Field Work Manager, Timelinx' Service Management Solutions for Sage CRM, CRM Together's Customer 365 Self-Service Portal and SalesFusion's SalesFusion 360. Additionally, Sage CRM 7.3 delivered a host of exciting features for sales users and business managers, and as per our published roadmap, upcoming releases will focus on functionality for customer service and marketing users.

For more information, please contact Azamba directly at sales@azamba.com or contact your local Analyst Relations Manager.