

Customer Relationship Management Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY

***ISG** Research



Key Takeaways – Customer Relationship Management

Customer Relationship Management (CRM) provides the operational foundation for managing customer and prospect data across marketing, sales and service. As buying journeys expand across digital channels and subscription models, enterprises require a consistent, real-time view of engagement to coordinate revenue execution and lifecycle management. Today's CRM platforms extend beyond recordkeeping to embed workflow, analytics and AI into daily operations, aligning revenue teams around shared processes and data.

Software Provider Summary

The ISG Buyers Guide™ for Customer Relationship Management evaluates seven software providers offering products that support marketing automation, sales force automation, customer service, AI and analytics, workflow automation and configure, price, quote capabilities. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. HubSpot, Oracle and Salesforce were rated Exemplary, while Microsoft was rated Innovative. Oracle NetSuite, SAP and Zoho were rated Merit.

Product Experience

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), including adaptability, manageability, reliability and usability. Salesforce, Oracle and Microsoft achieved the highest performance as Leaders in this category, supported by comprehensive lifecycle coverage across onboarding, configuration and operations and by robust platform architecture that enables governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, showing strong customer advocacy and a clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should position CRM as a unified architectural foundation for data, workflow and AI across revenue functions. Evaluation should prioritize platform robustness, integration flexibility and governance to reduce technical debt and support evolving business models. Executive alignment across revenue leadership and IT is essential to drive standardized processes, adoption and disciplined revenue management.



The Findings – Customer Relationship Management

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider’s website, the buying process and the customer journey.

Overall Scoring of Software Providers Across Categories

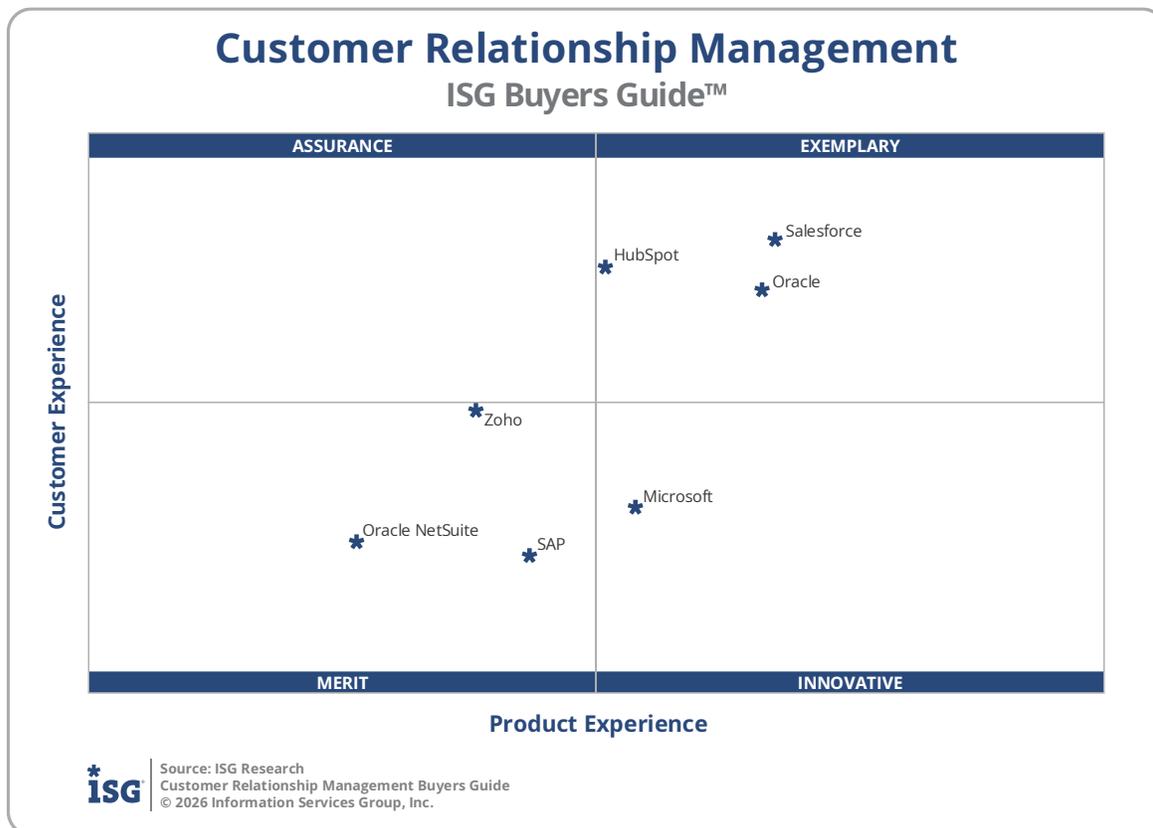
The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in five categories, HubSpot in three and Microsoft in two categories.

The quadrant chart below presents ratings for Product Experience and Customer Experience on the x- and y-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, place farther to the right. The performance and weighting for the Customer Experience category determine placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Customer Relationship Mgmt.			
Overall			
Providers	Grade	Performance	
Salesforce	A-	Leader	83.2%
Oracle	A-	Leader	82.4%
HubSpot	B++	Leader	78.0%
Microsoft	B++		75.2%
Zoho	B+		72.4%
SAP	B+		71.3%
Oracle NetSuite	B		66.3%

ISG | Source: ISG Research
Customer Relationship Management Buyers Guide
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The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. Placement represents the software providers’ weighted performance in meeting the requirements of product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: HubSpot, Oracle and Salesforce.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: Microsoft.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. No providers were rated Assurance.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Oracle NetSuite, SAP and Zoho.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent a provider's value nor indicate universal suitability of a set of products.



Key Takeaways – CRM Platforms

CRM platforms have become a strategic priority as enterprises address complex buying journeys, omnichannel engagement and pressure to balance growth with profitability. Fragmented legacy environments limit visibility, slow AI adoption and constrain coordination across expanding subscription, partner and digital commerce models. Organizations are prioritizing unified platform decisions to standardize processes, improve data quality and align revenue teams around shared operational workflows.

Software Provider Summary

The ISG Buyers Guide™ for CRM Platforms evaluates 12 software providers offering products that support marketing automation, sales force automation, customer service, AI and analytics, workflow automation and configure, price, quote functionality. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. HubSpot, Microsoft, Oracle, Salesforce, Veeva and Zoho were rated Exemplary, with SAP rated Innovative. Infor was rated as Assurance, and BUSINESSNEXT, Odoo, Oracle NetSuite and Sage were rated as Merit.

Product Experience

Product Experience, representing 80% of the evaluation, focuses on Capability (15%) and Platform (65%), including adaptability, manageability, reliability and usability. Oracle, Salesforce and HubSpot achieved the highest performance as Leaders in this category, supported by broad functional coverage across CRM analytics, marketing, sales and service and a robust, flexible platform foundation that emphasizes governance, scalability and integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, demonstrating strong customer advocacy and a clear investment in successful outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should evaluate CRM platforms as unified architectural foundations that integrate data, workflow and AI across revenue functions. Assessments must prioritize platform resilience, integration maturity and governance to reduce customization risk and enable long-term adaptability. Executive alignment across revenue, operations and IT is critical to standardize processes and drive sustained adoption.



The Findings – CRM Platforms

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

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Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in five categories, HubSpot in four and Microsoft in one category.

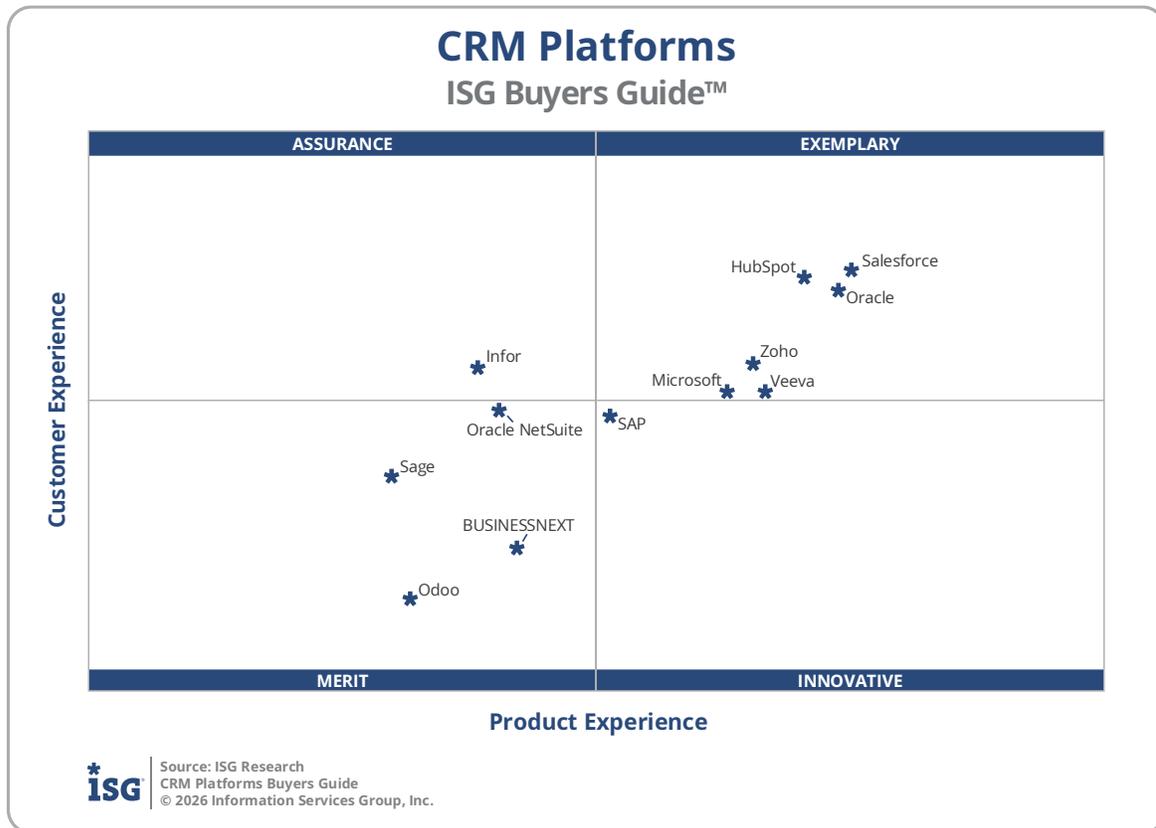
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CRM Platforms
Overall

Providers	Grade	Performance
Salesforce	A-	Leader 84.2%
Oracle	A-	Leader 82.4%
HubSpot	B++	Leader 81.1%
Microsoft	B++	76.8%
Zoho	B+	74.8%
Veeva	B+	73.6%
SAP	B+	71.6%
Oracle NetSuite	B	66.8%
BUSINESSNEXT	B-	60.2%
Sage	B-	57.5%
Odoo	C++	55.9%
Infor	C++	55.4%

Source: ISG Research
CRM Platforms Buyers Guide
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The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. Placement represents the software providers’ weighted performance in meeting the requirements of product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: HubSpot, Microsoft, Oracle, Salesforce, Veeva and Zoho.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: SAP.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The provider rated Assurance is Infor.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: BUSINESSNEXT, Odoo, Oracle NetSuite and Sage.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent a provider's value nor indicate universal suitability of a set of products.



Key Takeaways – CRM Marketing

CRM marketing has become a strategic priority as enterprises address rising acquisition costs, stricter privacy requirements and pressure to demonstrate measurable marketing return. Fragmented technology stacks and reduced reliance on third-party data are accelerating consolidation around unified CRM environments. Organizations are prioritizing centralized customer data and coordinated engagement to improve targeting precision, strengthen sales alignment and connect marketing activity directly to revenue outcomes.

Software Provider Summary

The ISG Buyers Guide™ for CRM Marketing evaluates 17 software providers offering products that support audience segmentation, campaign orchestration, lead management, attribution analytics and AI-driven personalization. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Adobe, Creatio, HubSpot, Microsoft, Oracle, Salesforce, Veeva and Zoho were rated Exemplary, with SAP rated Innovative. Infor was rated as Assurance, and BUSINESSNEXT, Constant Contact, monday.com, Odoo, Oracle NetSuite, Sage and Zendesk were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), which includes adaptability, manageability, reliability and usability. Salesforce, Oracle and HubSpot achieved the highest performance as Leaders in this category, supported by advanced audience segmentation, campaign orchestration capabilities and robust platform foundations, enabling governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, demonstrating strong customer advocacy and a clear investment in successful outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize CRM marketing platforms that unify first-party data, attribution and workflow within governed architectures. Evaluation must emphasize integration with sales processes, transparency in performance measurement and disciplined AI oversight. Cross-functional alignment across marketing, sales and revenue operations is essential to sustain trust in reporting and drive measurable pipeline contribution.



The Findings – CRM Marketing

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

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Overall Scoring of Software Providers Across Categories

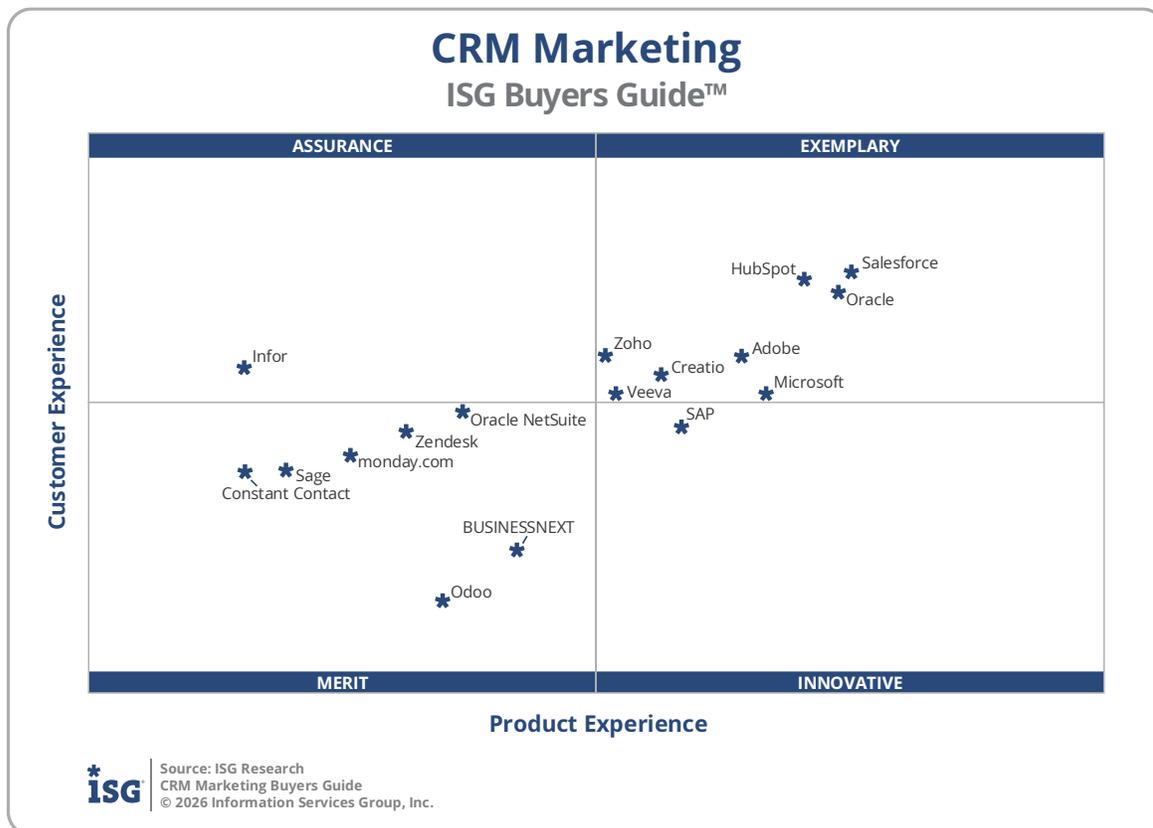
The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Oracle and Salesforce have done so in five categories, HubSpot in four and Microsoft in one category.

The quadrant chart below presents ratings for Product Experience and Customer Experience on the x- and y-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, place farther to the right. The performance and weighting for the Customer Experience category determine placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

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CRM Marketing Overall		
Providers	Grade	Performance
Salesforce	A-	Leader 84.2%
Oracle	A-	Leader 83.3%
HubSpot	B++	Leader 81.1%
Microsoft	B++	76.3%
Adobe	B++	76.1%
Creatio	B+	73.0%
SAP	B+	71.0%
Zoho	B+	70.6%
Veeva	B+	70.2%
Oracle NetSuite	B-	61.9%
BUSINESSNEXT	B-	61.2%
Zendesk	B-	58.6%
Odoo	C++	55.1%
monday.com	C++	53.9%
Infor	C++	53.2%
Sage	C++	50.3%
Constant Contact	C+	47.6%

ISG | Source: ISG Research
CRM Marketing Buyers Guide
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Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Adobe, Creatio, HubSpot, Microsoft, Oracle, Salesforce, Veeva and Zoho.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: SAP.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The provider rated Assurance is: Infor.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: BUSINESSNEXT, Constant Contact, monday.com, Odoo, Oracle NetSuite, Sage and Zendesk.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.



Key Takeaways – CRM Sales

CRM sales software has become a central coordination layer for enterprise revenue execution as organizations address longer buying cycles, margin pressure and heightened expectations for forecast reliability. Buyers are increasingly navigating digital research, peer validation and assisted selling, requiring structured opportunity management and standardized progression. Enterprises are prioritizing governed workflows, real-time pipeline visibility and integrated pricing coordination to connect frontline activity directly to financial outcomes.

Software Provider Summary

The ISG Buyers Guide™ for CRM Sales evaluates 19 software providers offering products that support account and opportunity management, pipeline and forecasting, territory alignment, pricing coordination, analytics and AI-driven revenue guidance. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Creatio, HubSpot, Microsoft, Oracle, Oracle NetSuite, Salesforce, ServiceNow and Zoho were rated Exemplary, with SAP and SugarCRM rated Innovative. Infor and Veeva were rated Assurance, and Aptean, BUSINESSNEXT, monday.com, Odoo, Sage, Zendesk and ZoomInfo were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), including adaptability, manageability, reliability and usability. Salesforce, Oracle and HubSpot achieved the highest performance as Leaders in this category, supported by structured opportunity and pipeline management frameworks and robust platform architecture that enables governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, demonstrating strong customer advocacy and showing a clear investment in successful outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize CRM sales platforms that standardize qualification, forecasting and pricing workflows within governed architectures. Evaluations must emphasize integration with finance and revenue operations, disciplined data management and readiness for AI-enabled guidance. Executive sponsorship and clear process ownership are essential to improving forecast transparency and sustaining predictable growth.



The Findings – CRM Sales

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

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Overall Scoring of Software Providers Across Categories

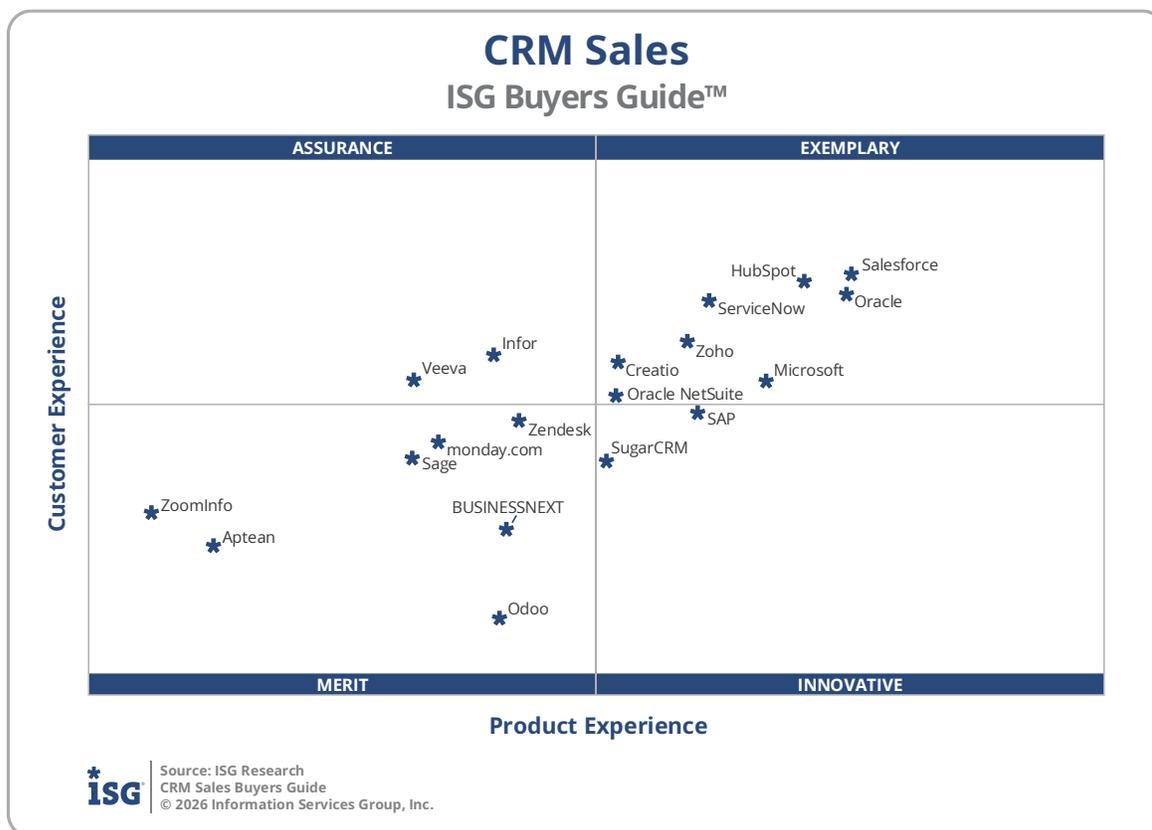
The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in five categories, HubSpot in three, and Microsoft and ServiceNow in one category.

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CRM Sales Overall			
Providers	Grade	Performance	
Salesforce	A-	Leader	83.3%
Oracle	A-	Leader	82.7%
HubSpot	B++	Leader	80.5%
ServiceNow	B++		75.8%
Microsoft	B++		75.4%
Zoho	B+		73.4%
SAP	B+		70.8%
Creatio	B		67.8%
Oracle NetSuite	B		67.3%
SugarCRM	B		64.4%
Infor	B		64.0%
Zendesk	B		62.9%
Veeva	B-		59.5%
BUSINESSNEXT	B-		58.8%
monday.com	B-		56.5%
Odoo	C++		56.0%
Sage	C++		54.8%
Aptean	C+		45.5%
ZoomInfo	C+		44.3%

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Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Creatio, HubSpot, Microsoft, Oracle, Oracle NetSuite, Salesforce, ServiceNow and Zoho.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: SAP and SugarCRM.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Infor and Veeva.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Aptean, BUSINESSNEXT, monday.com, Odoo, Sage, Zendesk and ZoomInfo.

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Key Takeaways – CRM Service

CRM service capabilities are strategically important as enterprises link retention, renewal and lifetime value to consistent post-sale engagement. In markets shaped by real-time digital expectations and low switching costs, service performance affects revenue stability and brand perception. Organizations are prioritizing structured case management, governed workflows and integrated knowledge delivery to improve responsiveness and transform service into a measurable driver of loyalty and operational efficiency.

Software Provider Summary

The ISG Buyers Guide™ for CRM Service evaluates 14 software providers offering products that support case and ticket management, knowledge management, SLA tracking, multichannel engagement, analytics and AI-driven service optimization. The research ranked the top three overall leaders as Salesforce, Oracle and ServiceNow. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. HubSpot, Microsoft, Oracle, Salesforce, ServiceNow and Zoho were rated Exemplary, with SAP and Zendesk rated Innovative. Infor and Veeva were rated Assurance, and BUSINESSNEXT, Odoo, Oracle NetSuite and Sage were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), which includes adaptability, manageability, reliability and usability. Salesforce, Oracle and ServiceNow achieved the highest performance as Leaders in this category, supported by comprehensive case and workflow management capabilities and robust platform architecture emphasizing governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, demonstrating strong customer advocacy and a clear investment in successful outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize CRM service platforms that unify case data, knowledge governance and SLA management within integrated architectures. Evaluations must emphasize cross-functional integration, analytics transparency and disciplined AI controls to sustain trust and accountability. Alignment across service leadership, operations and IT is essential to drive measurable performance improvement and long-term retention.



The Findings – CRM Service

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

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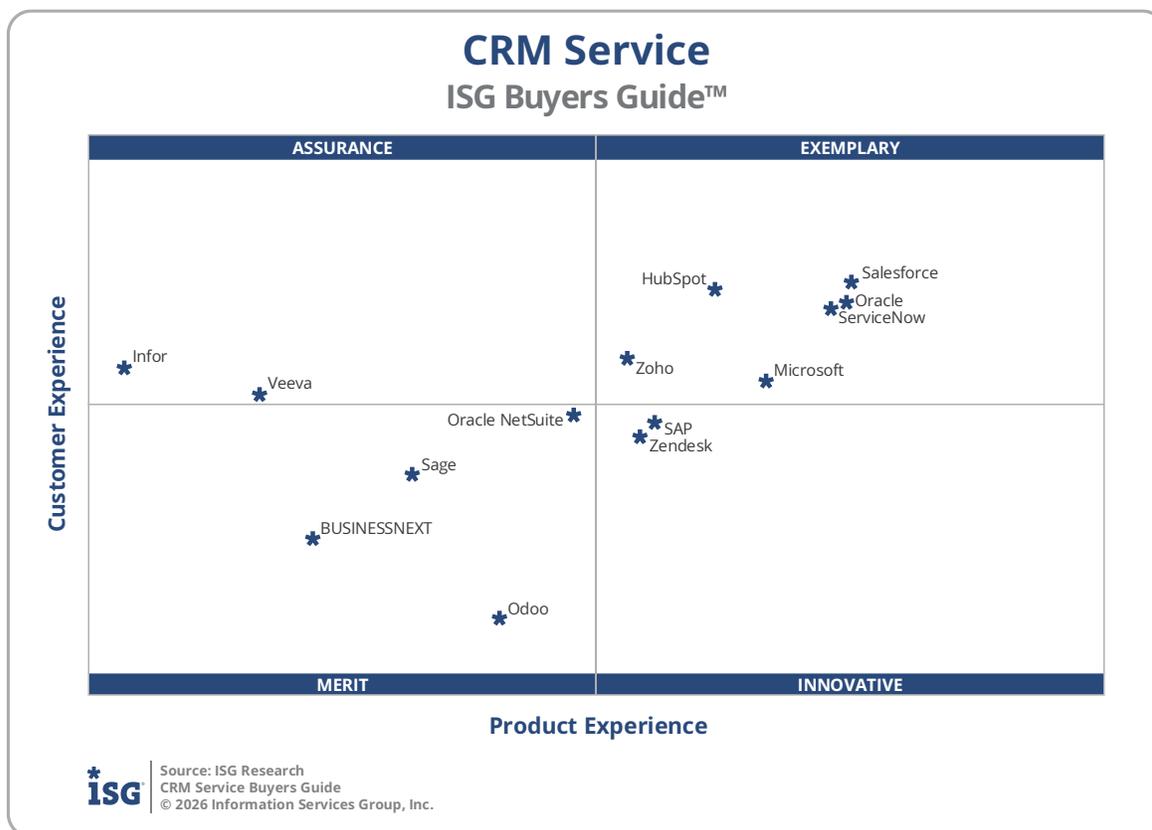
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CRM Service Overall			
Providers	Grade	Performance	
Salesforce	A-	Leader	82.5%
Oracle	A-	Leader	81.9%
ServiceNow	A-	Leader	81.6%
HubSpot	B++		77.4%
Microsoft	B++		75.2%
Zoho	B+		73.3%
SAP	B+		71.1%
Zendesk	B+		70.5%
Oracle NetSuite	B		68.4%
Sage	B-		58.4%
Veeva	B-		57.7%
Odoo	B-		57.1%
BUSINESSNEXT	C++		55.5%
Infor	C++		53.3%

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Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: SAP and Zendesk.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Infor and Veeva.

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About ISG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data and research, in-depth knowledge and governance of provider ecosystems, and the expertise of its 1,500 professionals worldwide working together to help clients maximize the value of their technology investments.