

# CRM Platform Buyers Guide

Software Provider and Product Assessment



EXECUTIVE  
SUMMARY

**\*ISG** Research™



# CRM Platform

CRM platforms are a comprehensive technology designed to facilitate and optimize interactions between an enterprise and its customers throughout the entire customer lifecycle. CRM platforms give enterprises the flexibility to integrate applications such as marketing, sales and service, along with the support of digital commerce and the operations and management of partners. This integration is crucial because customers often interact through multiple channels, and having a unified platform simplifies the process of tracking these interactions and information.

ISG defines CRM Platform as a set of applications that support the processes and tasks for managing and operating customer relationships across core areas of marketing, sales and



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service. The evolution of AI and machine learning in CRM platforms include the use of generative AI (GenAI) and can provide a modern digital experience through agents and digital assistants.

The ability to share information across various activities is a key advantage of such platforms. The more data needs to be transferred between teams, the higher the likelihood of errors or omissions, which can lead to customer frustration. By enabling seamless information sharing, these platforms help reduce such risks, ensuring a smooth and reliable flow of data. Additionally, the platform enables workflow processes across teams and ensures data normalization, which includes integrating third-party data into the CRM system. This data normalization supports the goal of improving transaction efficacy between buyers and

sellers.

CRM platforms play several key roles in managing customer interactions, one of which being customer data management. CRM platforms store and organize detailed customer information, including contact details, interaction history and purchase records to create a centralized data repository provides a 360-degree view of each customer, enabling personalized and informed interactions.

CRM platforms should be able to support physical retail operations just as they can serve to support digital commerce. Many customers now prefer to conduct their shopping entirely online but no matter where they shop, information related to the customer should be available. The focus in CRM platforms has been on understanding the customer, including gathering information that can be used to help guide their interests and the propensity to purchase specific products and services. The more businesses know about their customers, the more effective they can be in promoting relevant products and services. Unlike a physical



retail store that may not know who a customer is and cannot offer personalized promotions, a CRM can provide tailored offers based on a customer's specific interests that can be provide to commerce, marketing and customer service channels.

The benefits of CRM platforms are numerous and impactful. They improve customer relationships by providing a comprehensive and organized view of customer interactions. Operational efficiency is enhanced through the automation of routine tasks and the centralization of data, streamlining business processes and reducing manual work and errors. CRM platforms can support facilitated collaboration across departments to better align the goals of marketing, sales and service teams. Additionally, the insights provided by CRM

analytics allow businesses to identify trends, track performance and optimize resource allocation.



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Ideally, in a well-constructed CRM system, these functionalities would be integrated as modules within the platform. A modern CRM platform should have shared services for various processes, such as providing product information and computing prices. Whether conducting a commerce transaction or generating a quote, the pricing calculation should be consistent across different channels, be it through commerce, partners, or direct sales representatives.

A unified platform allows for the standardization of various processes. There should be a single, consistent definition of a product across the entire enterprise,

however, many companies struggle with multiple product and price lists scattered across different spreadsheets for various groups within the enterprise, leading to inconsistencies and inefficiencies. Master data management (MDM) and product information management (PIM) can address this issue by centralizing and standardizing product and pricing information on a single platform. This centralized data can then be utilized by different departments such as marketing, sales, post-sales service, commerce and partners.

Instead of ingesting data multiple times for different purposes, a unified CRM platform allows for a one-time data ingestion process. Once normalized, the data can be made available to all relevant departments through the platform. This approach simplifies data management and reduces redundancy. The platform can then support the use of AI and machine learning in a more governed manner, as well as support the range of applications and interactions with the workforce and customers.

Platforms should also be extensible, allowing businesses to adapt and grow their systems through workflows or point integrations. Regardless of whether the integration is for marketing, sales or commerce, it should follow a standard procedure. Unified workflows can traverse multiple groups, eliminating the need for separate workflow activities for each



department. By using a platform with low-code or no-code workflow capabilities, businesses can streamline their operations and ensure that all departments are aligned in their processes.

The ISG Buyers Guide™ for CRM Platform evaluates products based on capabilities that facilitate the use of an integrated and extensible platform that can help orchestrate activities across all teams involved in marketing, sales and servicing customers. In addition, the data and data model should be accessible using a set of standard reporting and analytic methods. The CRM platform should also support the innovation of AI and machine learning. Finally, CRM platforms should allow customers and third parties to develop applications that can work co-operantly to enable functions not necessarily offered by the primary application. The included providers offered capabilities in all or most of these areas.

This research evaluates the following software providers that offer products that address key elements of CRM platform as we define it: Creatio, HubSpot, Microsoft, NetSuite, Oracle, Salesforce, SAP, SugarCRM, Zendesk and Zoho.



## Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for CRM Platform is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for CRM platform software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for CRM platform to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of CRM platform technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment



time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of CRM platform software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating CRM platform systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



# How To Use This Buyers Guide

## Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.  
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.  
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.  
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.  
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.  
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.  
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.  
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.  
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.





# The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise’s established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

## Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Oracle and HubSpot. Companies that place in the top three of a category earn the designation of Leader. Salesforce has done so in seven categories; HubSpot and Oracle in six and SAP and Zoho in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines 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.

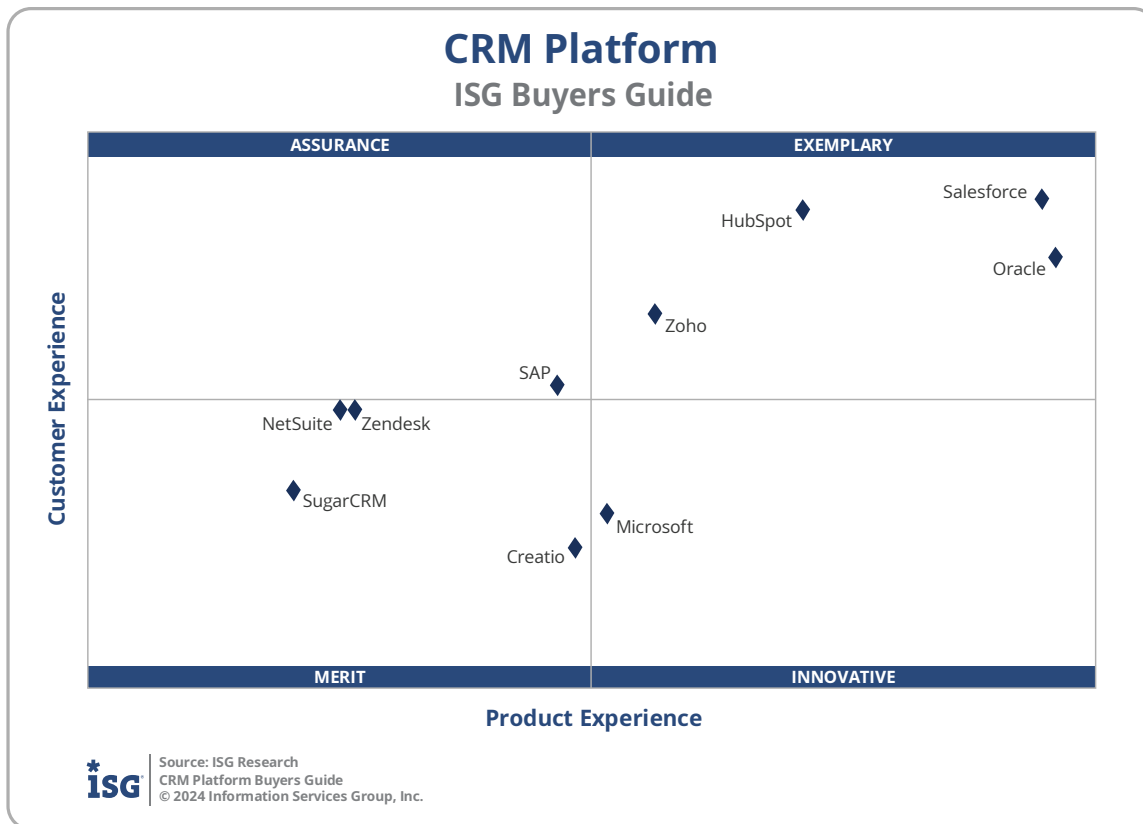
**CRM Platform**  
Overall

Providers	Grade	Performance
Salesforce	A-	<b>Leader</b> 84.2%
Oracle	A-	<b>Leader</b> 83.0%
HubSpot	B++	<b>Leader</b> 79.2%
Zoho	B++	75.1%
SAP	B+	70.2%
Microsoft	B+	69.0%
Creatio	B	68.5%
Zendesk	B	66.8%
NetSuite	B	65.7%
SugarCRM	B	63.0%

**ISG** | Source: ISG Research  
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.





**Exemplary:** The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: HubSpot, Oracle, Salesforce and Zoho.

**Innovative:** The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: Microsoft.

**Assurance:** The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The provider rated Assurance is: SAP.

**Merit:** The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Creatio, NetSuite, SugarCRM and Zendesk.



We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle CRM platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.




## Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise’s life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise’s requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (10%), Capability (20%), Reliability (20%), Adaptability (15%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. Oracle, Salesforce and HubSpot were designated Product Experience Leaders.

Providers	Grade	Performance
Oracle	A-	<b>Leader</b> 66.0%
Salesforce	A-	<b>Leader</b> 65.9%
HubSpot	B++	<b>Leader</b> 60.5%
Zoho	B+	57.8%
Microsoft	B+	56.9%
Creatio	B+	56.5%
SAP	B+	56.2%
Zendesk	B	51.0%
NetSuite	B	50.9%
SugarCRM	B-	49.7%

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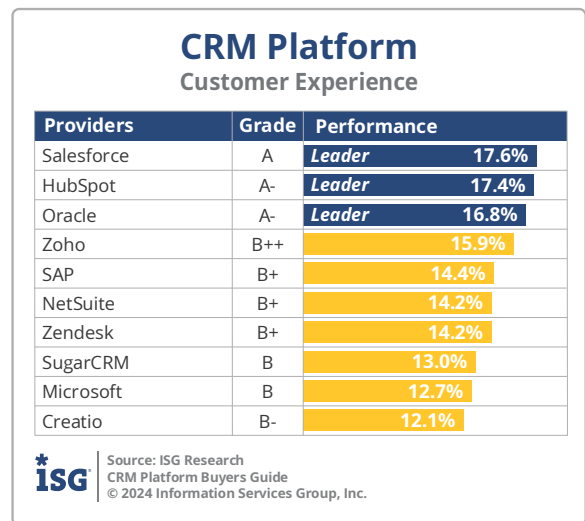
## Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Salesforce, HubSpot and Oracle. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to make readily available sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise’s journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.





## Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for CRM Platform in 2024, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 100 customers. The principal source of the relevant business unit's revenue must be software-related and there must have been at least one major software release in the last 12 months.

The provider must provide a platform that supports unified data model, orchestration, analytics and reporting, integration with specific CRM systems and support for collaboration. The CRM platforms evaluated for support of the core fundamentals of CRM in marketing, sales and service but also digital commerce and partner relationship management.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant CRM platform products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



## Products Evaluated

<b>Provider</b>	<b>Product Names</b>	<b>Version</b>	<b>Release Month/Year</b>
Creatio	Creatio CRM	8.1.4 Quantum	July 2024
HubSpot	HubSpot Customer Platform	n/a	August 2024
Microsoft	Microsoft Dynamics 365	2024 release wave 1	August 2024
NetSuite	NetSuite CRM	2024.2	September 2024
Oracle	Oracle CX	24C	August 2024
Salesforce	Salesforce Platform	Summer '24	August 2024
SAP	SAP Sales, Service, Commerce Cloud	2408	August 2024
SugarCRM	SugarCRM, Sugar Sell	14.0	August 2024
Zendesk	Zendesk	n/a	August 2024
Zoho	Zoho CRM, Zoho One	n/a	August 2024



### Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

<b>Provider</b>	<b>Product</b>	<b>Product Support</b>	<b>Revenue</b>	<b>Customers</b>	<b>Locations</b>
Monday.com	Monday.com	No	Yes	Yes	Yes
Freshworks	Freshdesk, Freshservice, Freshsales. Freshmarketer	No	Yes	Yes	Yes





## About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our [community](#), and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored [Assessment Services](#) and our Value Index methodology. Visit [www.ventanaresearch.com](http://www.ventanaresearch.com) to sign up for free community membership with access to our research and insights.

## About ISG Research

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## About ISG

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