

CRM Sales Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***ISG** Research™



CRM Sales

Customer relationship management (CRM) allows sales management and sellers to utilize the tools in what has historically been called salesforce automation (SFA) and remains a critical component of modern CRM systems. As the digital transformation of businesses continues to evolve, CRM systems have become more sophisticated, providing sales teams with advanced tools and capabilities to drive performance and maximize revenue. The integration of comprehensive sales management and selling functionalities within CRM systems is essential for streamlining processes, enhancing customer interactions and ultimately achieving sales goals.



Modern CRM systems offer a suite of sales tools designed to assist sales leaders and teams in various aspect of their work.

ISG defines CRM Sales as the set of applications that support the processes and tasks for leaders, managers and sellers.

Modern CRM systems offer a suite of sales tools designed to assist sales leaders and teams in various aspects of their work, from lead generation to deal closure. Effective lead management is fundamental to any sales strategy. CRM systems offer functionalities to capture, track and nurture leads throughout the sales pipeline. Automated lead scoring mechanisms help sales teams prioritize leads based on their likelihood to convert, ensuring that the largest opportunities receive immediate attention.

Organizing and maintaining detailed information about customers and prospects is a key aspect of sales management. CRM systems provide a centralized repository for account and contact information, allowing sales representatives to access up-to-date data, track interactions and manage relationships more effectively.

Visualizing and managing the sales pipeline is crucial for forecasting and planning. CRM systems offer real-time tracking of sales opportunities, enabling sales managers to monitor the progress of deals, identify bottlenecks and make informed decisions to improve pipeline health. Customizable dashboards and reports provide insights into key performance metrics and sales trends.

To stay organized and productive, sales teams need tools to manage their activities and tasks. CRM systems offer features for scheduling meetings, setting reminders and tracking follow-up actions. Integration with email and calendar applications ensures that sales representatives can manage their schedules and communications seamlessly.

Generating accurate and timely quotes is essential for closing deals. CRM systems streamline the quote creation by integrating with pricing and product catalogs. Sales representatives can



generate customizable quotes, manage approvals and convert quotes into orders with just a few clicks, reducing administrative tasks and accelerating the sales cycle.

Insightful sales forecasting and analytics capabilities are crucial for strategic planning. CRM systems provide advanced analytics tools that enable sales managers to analyze historical data, predict sales trends and create data-driven forecasts. These insights help in setting realistic sales targets, identifying growth opportunities and optimizing resource allocation.

When it comes to targets, whether providing the functionality with the CRM system or offering close integration with third-party applications, setting up the sales organization for success is dependent on good planning. Within the sales domain, key planning components have the ability to take corporate goals and targets and ensure they are distributed to individual and teams. Likewise, the design and management of incentive compensation is important to maintain motivation for sellers. Unlike in the past, modern planning is not one and done, but continuously adjusted as actual and projected results occur during the year.

Effective collaboration and communication within sales teams are vital for success. CRM systems offer integrated communication tools such as chat, email and video conferencing.



The integration of AI and automation in CRM systems is revolutionizing sales management and selling.

Additionally, collaboration features like shared workspaces and document management enhance teamwork and ensure that all team members have access to the necessary information.

The integration of AI and automation in CRM systems is revolutionizing sales management and selling. AI-powered tools, such as predictive analytics, customer sentiment analysis, and intelligent lead nurturing, provide sales teams with actionable insights and recommendations. Automation of routine tasks, such as data entry and follow-up reminders, allows sales representatives to focus on high-value activities and

improving efficiency.

Generative AI (GenAI) is particularly impactful in enhancing the sales process. GenAI can assist sales teams in crafting personalized communication, generating tailored product recommendations, and identifying potential upsell and cross-sell opportunities. By leveraging AI-driven insights, sales teams can better understand customer needs and preferences, resulting in more effective engagement and higher conversion rates.



It is important that enterprises also recognize the need to empower sales organizations to take advantage of using AI. We believe that by 2027, one-quarter of enterprises will invest in new skills for sellers to better utilize data and AI to improve revenue outcomes.

The integration of sales management functionalities within CRM systems offers numerous benefits to organizations. CRM systems automate and streamline various sales processes, reducing manual tasks and minimizing errors. This leads to increased efficiency and allows sales teams to focus on strategic activities. Centralized customer data and advanced analytics tools provide sales teams with a 360-degree view of customers. Understanding customer behavior and preferences enables personalized interactions and fosters stronger relationships.

With access to real-time data, sales forecasts and performance metrics, sales managers can make informed decisions to drive performance. Tracking KPIs and setting achievable targets help in achieving sales objectives. Integrated communication and collaboration tools facilitate better teamwork and information sharing within sales teams. This leads to a more coordinated approach to sales and improved overall team performance. Modern CRM systems are highly customizable, allowing organizations to tailor the sales management functionalities to their specific needs. This flexibility ensures that the system can adapt to changing business requirements and support growth.

Sales management and selling is a vital aspect of modern CRM systems, providing sales teams with the tools and capabilities needed to drive success in a competitive marketplace. By leveraging advanced features such as lead management, sales pipeline tracking, AI-driven insights and integrated communication, CRM systems empower sales representatives to build stronger relationships with customers, improve efficiency and achieve their sales targets. As businesses continue to embrace digital transformation, the role of CRM systems in sales management will undoubtedly become even more significant, driving innovation and growth.

The ISG Buyers Guide™ for CRM Sales evaluates software providers and products in key areas such as opportunity and pipeline management, collaboration, digital sales engagement, integration with specific systems, and sales planning including forecasting, territory, quota and incentives, as well as reporting and analytics, and the support for sales and revenue operations and insights to the support of the evolving use of AI and machine learning.

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

Office of Revenue
Market Assertion

By 2027, one-quarter of enterprises will invest in new skills for sellers to better utilize data and AI to improve revenue outcomes.

Stephen Hurrell
Director of Research, Office of Revenue

ISG Research™

The graphic is a dark blue rounded rectangle with a light blue border. It contains the title 'Office of Revenue' in white, followed by 'Market Assertion' in a smaller font. Below this is the market assertion text in white. A circular portrait of Stephen Hurrell is on the right, with his name and title below it. The ISG Research logo is at the bottom left of the graphic.



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 Sales 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 sales 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 sales 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 sales 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 sales 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 sales 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

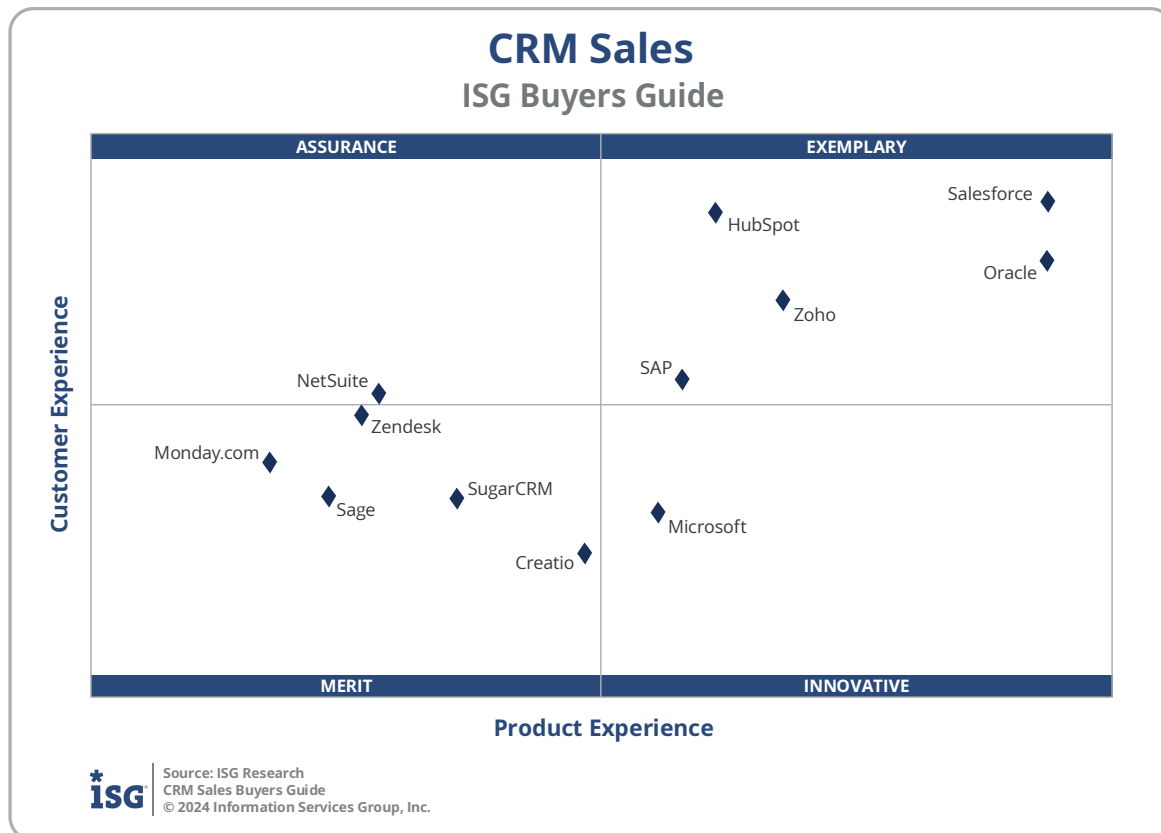
The research finds Salesforce atop the list, followed by Oracle and HubSpot. Companies that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in six categories; HubSpot in five; SAP in two; and Zoho in one category.

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 Sales Overall			
Providers	Grade	Performance	
Salesforce	A-	Leader	83.3%
Oracle	A-	Leader	82.4%
HubSpot	B+	Leader	73.8%
Zoho	B+		73.2%
SAP	B+		69.4%
Microsoft	B		66.6%
Creatio	B		64.0%
NetSuite	B-		62.2%
SugarCRM	B-		61.3%
Zendesk	B-		60.8%
Sage	B-		57.9%
Monday.com	C++		56.1%

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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, SAP 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: NetSuite.

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, Monday.com, Sage, 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 sales, 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 (20%), Capability (25%), Reliability (10%), Adaptability (10%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. Salesforce, Oracle and Zoho were designated Product Experience Leaders. While not Leaders, HubSpot, SAP and Microsoft were also found to meet a broad range of enterprise product experience requirements.

CRM Sales
Product Experience

Providers	Grade	Performance
Salesforce	A-	Leader 65.2%
Oracle	A-	Leader 65.2%
Zoho	B+	Leader 56.6%
HubSpot	B	54.9%
SAP	B	54.2%
Microsoft	B	53.7%
Creatio	B	51.4%
SugarCRM	B-	47.7%
NetSuite	B-	45.6%
Zendesk	C++	44.7%
Sage	C++	43.8%
Monday.com	C++	41.9%

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Customer Experience

The importance of a customer’s relationship with a software provider is essential to the actual successful outcome through the use of the products and technology. The Customer Experience while supporting the entire life cycle an enterprise has with its software provider is critical to ensure a successful working relationship 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 given a weighting of 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 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.

CRM Sales
Customer Experience

Providers	Grade	Performance
Salesforce	A	Leader 17.6%
HubSpot	A-	Leader 17.4%
Oracle	A-	Leader 16.8%
Zoho	B++	15.9%
SAP	B+	14.4%
NetSuite	B+	14.2%
Zendesk	B+	14.2%
Monday.com	B	13.3%
Sage	B	13.0%
SugarCRM	B	13.0%
Microsoft	B	12.7%
Creatio	B-	12.1%

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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for CRM Sales 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.

Inclusion in this CRM Sales evaluation required a collection of capabilities in support of sales opportunity and pipeline management, sales forecasting, digital engagement, territory and quota planning, incentive compensation and analytics.

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 sales 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

Provider	Product Names	Version	Release Month/Year
Creatio	Sales Creatio	8.1.4 Quantum	July 2024
HubSpot	HubSpot Sales Hub	n/a	August 2024
Microsoft	Microsoft Dynamics 365 Sales	2024 release wave 1	August 2024
Monday.com	monday CRM	n/a	August 2024
NetSuite	NetSuite CRM	2024.2	September 2024
Oracle	Oracle CX Sales	24C	August 2024
Sage	Sage CRM	2024 R1	May 2024
Salesforce	Salesforce Sales Cloud	Summer '24	August 2024
SAP	SAP CRM Sales	2408	August 2024
SugarCRM	SugarCRM, Sugar Sell	14.0	August 2024
Zendesk	Zendesk Sell	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.”

Provider	Product	CRM Suite	Revenue	Customers	Regions
Apollo.io	Apollo.io	No	Yes	Yes	Yes
Clari	Clari Revenue Platform	No	Yes	Yes	Yes
Freshworks	Freshsales	No	Yes	Yes	Yes
Gong	Gong	No	Yes	Yes	Yes
Outreach	Outreach	No	Yes	Yes	Yes
People.ai	People.ai	No	No	Yes	Yes
Pipedrive	pipedrive	No	Yes	Yes	Yes
Revenue Grid	Revenue Grid	No	No	Yes	Yes
SalesDirector.ai	SalesDirector.ai	No	No	Yes	Yes
Salesloft	Salesloft	No	Yes	Yes	Yes
ZoomInfo	ZoomInfo Sales	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 to sign up for free community membership with access to our research and insights.

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