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CRM TECHNOLOGY VALUE MATRIX 2H2018

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THE BOTTOM LINE

Leading CRM providers are focused on breaking down barriers: those between siloed applications serving sales, service, and marketing, and those that limit user productivity. This is driving investments in integration to provide a complete view of the customer and leverage artificial intelligence (AI) across all interactions, and investments in user interface (UI) enhancements and embedded intelligence and coaching. With innovations coming on a quarterly basis from most leaders, those that can't keep pace are increasingly challenged.

CRM

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OVERVIEW

Vendors on the Matrix are positioned based on the relative usability and functionality of their respective products compared to competitors and the overall market (Nucleus Research s142 – *Understanding the Value Matrix* – September 2018). As the core functional capabilities of marketing, sales, and service automation have matured, vendors are investing in four main areas:

- Artificial intelligence (AI) and analytics. Embedded analytics and some AI capabilities have become table stakes for CRM competition today – even if users may be slower to adopt in some areas (such as sales force automation) than vendors would like. Nucleus expects continued investment here as vendors refine their delivery of AI to enable model-driven data cleansing and more transparent (and, thus, credible) models for prediction.
- Integration. With most organizations having grown separate sales, marketing, and service technology functions (and, in many cases, multiple applications or instances in each core CRM area), disparate data is increasingly a challenge for providing any real-time understanding of a complete customer history. Vendors are making investments in integration both organically and by acquisition to help customers retain their existing investments while taking advantage of cross-core opportunities.
- Usability. Most Leaders in the Matrix are making usability enhancements to their products on an ongoing basis, either through complete UI overhauls, subtle UI enhancements, or additional embedded intelligence and coaching features that enable users to automate more of their daily tasks and follow best practices.
- Edge capabilities. Seeking to extend their overall footprint and make their solutions stickier, vendors are continuing to invest in edge CRM capabilities – such as field service automation, configure price quote (CPQ), and enhanced analytics – that drive greater ROI for customers.

LEADERS

Leaders in the Value Matrix include Bpm'online, Infor CX, Microsoft Dynamics 365, Oracle CX Cloud, Salesforce.com, Satuit Technologies, and Veeva Systems.

BPM'ONLINE

Bpm'online offers a business process management (BPM) platform that can be leveraged to manage processes throughout the business, including CRM. The product is improved at a rapid pace with monthly feature updates. Recently announced strategic partnerships demonstrate that the company is experiencing growth, looking to expand its customer base, and add new integrations and capabilities to its platform. Relevant announcements and updates since the publication of the last Matrix include:

- In August, Bpm'online announced updates to predictive data analytics with AI, improvements to data navigation and data management on the platform, and general upgrades to the interface designed to improve the user experience and make the platform more intuitive to use.

- On May 18, the company announced the availability of new solutions on the Bpm'online marketplace, including new data connectors with third-party applications such as Google Forms and Slack, a survey management tool, records color highlighting, printable email attachments, and enterprise information technology service management (ITSM).
- On May 9, the company announced a strategic partnership with Rallyware, a provider of workforce engagement and training platforms. The partnership will deliver KPI-driven training for businesses, and a Rallyware connector with the Bpm'online platform.

Bpm'online remains firmly positioned in the Leaders quadrant because of the high usability of the solution and its significant investment in improving functional capabilities such as predictive analytics, AI, and data management.

INFOR CX

The Infor Customer Experience (CX) Suite includes Infor Configure Price Quote, Infor Contract Lifecycle Management, Infor CRM, Infor Interaction Advisor, Infor Marketing Resource Management, Infor Omni-channel Campaign Management, Infor Rhythm, Infor Sales Intelligence for CRM, and marketing automation through its partnership with Marketo.

Infor has not announced any feature updates to the CX Suite since the publication of the last Matrix (Nucleus Research s64 – *CRM Technology Value Matrix 1H2018* – April 2018). Relevant announcements include:

- In August, Infor successfully completed a security review of its software and became authorized by FedRAMP to offer Infor Government SaaS cloud-based solutions to U.S. federal agencies. It has partnered with Amazon Web Services to bring this product to market.
- In July, Infor announced a strategic partnership with online training service, OpenSesame. This partnership grants Infor customers access to any of the over 20,000 available OpenSesame e-learning courses in a variety of business areas and soft skills.

Infor's position is slightly degraded in the Leaders quadrant since the last publication of the Value Matrix because the pace of enhancements to product usability and functionality is lagging behind other players in the market. However, Nucleus expects announcements of a significant reengineering effort in the product in the near future that will likely drive a positive change in positioning in the next Matrix.

MICROSOFT DYNAMICS 365

With Microsoft Dynamics 365, Dynamics CRM and enterprise resource planning (ERP) capabilities are unified on one platform to provide an integrated suite of solutions for sales,

marketing, service, finance, operations, and talent management that is also seamlessly connected with Office 365. Like its competitors, Microsoft is focused on augmenting its enterprise tools with AI using Azure, and by using PowerBI and PowerApps, customers have access to no-code, low-code, and full development capabilities for custom analyses.

In July, Microsoft announced that it will start offering two major product updates per year, one in April and the other in October. Unveiled at the Microsoft Business Applications Summit (Nucleus Research s122 – *Microsoft Business Central update* – August 2018), the following improvements for the October '18 release include:

- Improvements to the UI including an enlarged back button, system commands, and a new command bar. Data accessibility and ease-of-navigation are emphasized with general display improvements such as the ability to display more columns, customized freeze panes, a new filter pane, limit totals, row-based copy and paste, and additional keyboard shortcuts.
- Sales updates include Playbooks, a new capability which allows organizations to automate repeatable sales actions and respond to external events. Integration between LinkedIn and Dynamics 365 streamlines creation of sales teams.
- Marketing updates include further integration with LinkedIn and the enablement of account-based marketing. There are new capabilities to build, deploy, manage, and evaluate multi-channel marketing campaigns, all in a drag-and-drop environment.
- Customer service updates include the Dynamics 365 Channel Integration Framework which allows businesses to create bi-directional engagement experiences using any cloud provider.
- Field service updates include integration with Azure IoT Central which enables remote monitoring of devices, and connected field service with IoT sensors triggering service agents' actions. With Mixed Reality technology, service agents can collaborate remotely with experts to resolve issues in context.

Microsoft announced new Dynamics 365 AI offerings for Sales, Customer Service, and Marketing to deliver out-of-box insights by unifying data and applying advanced intelligence to it. Microsoft also unveiled the first mixed reality applications for business, leveraging HoloLens technology to offer Dynamics 365 Remote Assist and Dynamics 365 Layout. Dynamics 365 Remote Assist is an application allowing experts to connect with employees for remote collaboration with heads-up, hands-free video calling, image sharing, and mixed reality annotations. Dynamics 365 Layout is a subscription application that imports 3D models to create and edit room and area layouts at real-world scale.

With improvements to the UI, automation, and custom configuration using code and code-free environments, Microsoft has kept pace with market leaders in usability. It is outpacing the market in functionality with increasing investment in AI and analytics, improved agent and supervisor experience, and edge technologies like mixed reality.

ORACLE CX CLOUD

Oracle Customer Experience (CX) Cloud includes functionality for sales, marketing (including loyalty management), service, configure price quote (CPQ), sales performance management (SPM), social, business-to-business and business-to-consumer commerce, and customer data management. Oracle's strong focus on data management capabilities, stemming from its time as primarily a database provider, is a strong differentiator for its CRM offering compared to other solutions.

Oracle has continued investing in AI-implementation in the Oracle CX Cloud to bring deeper insights and better recommendations to business users and unlock productivity gains with task automation. Recent updates include:

- Marketing updates include real-time behavioral insights, AI marketing orchestration, ad optimization, enhanced campaign development, and loyalty platform functionality.
- Sales updates include sales automation updates for AI sales intelligence, AI deal management, complex territory quota capabilities, and campaign effectiveness dashboards.
- CPQ updates include integration for 3D and augmented reality (AR) product visualization capabilities.
- Commerce updates include AI-based search capabilities, AI customer acquisition, and integrations with third-party vendors.
- Customer Service updates include a new virtual assistant, support for video chat to allow agents to resolve customer issues even more personally, and a new Service Monitoring for Connected Assets application.

Oracle is looking to encourage cloud adoption among its customers with its "Soar to the Cloud" initiative. It is an automated enterprise cloud application product that consists of automated tools and best practices for cloud transitions. It is currently only available for ERP deployments, but Oracle is investing internally to offer Soar for the CX Cloud in the future.

Due to its comprehensive end-to-end capabilities and data management expertise, Oracle remains positioned as a Leader in this Matrix with the highest rated functionality. This doesn't look to change as Oracle has embraced the migration to the cloud and growing customer preference for full-suite offerings.

SALESFORCE.COM

Salesforce.com's CRM clouds include Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Einstein Analytics, Industry Clouds (for financial services, healthcare, government, education, and non-profit), Philanthropy Cloud, Commerce Cloud, and Integration. Salesforce continues to encourage customers to adopt or transition to Lightning, its modern UI and development platform. With Lightning, customers have access

to the most up-to-date features and innovations from Salesforce, such as Einstein, its AI. With Trailhead, an online learning and developer experience community, users can educate themselves and grow their skillset with Salesforce technology. Recent announcements include:

- In June, at Salesforce Connections, Salesforce announced a number of updates to its Marketing, Commerce, and Service clouds including: integration with Google Analytics 360, Einstein Segmentation for Marketing Cloud to identify target audiences, Einstein Splits for Marketing Cloud which contains preconfigured decision splits based on engagement likelihood scores, Interaction Studio for Marketing Cloud for real-time offer management, campaign optimization, and lifecycle insights, and new integration between Marketing and Commerce Clouds. Salesforce leverages its acquisition of CloudCraze to offer Salesforce B2B Commerce, a solution for B2B-specific e-commerce, and Service for Commerce, a solution which gives agents real-time access to e-commerce data to aid with customer assistance and outreach. For Service Cloud, Salesforce expanded 2-way mobile messaging to 17 additional countries to support Service Cloud LiveMessage (Nucleus Research s103 – *Salesforce Connections update – June 2018*).
- In July, Salesforce acquired Datorama, a provider of cloud-based AI-powered analytics for marketing. Datorama specialties include data integration and marketing automation. With the acquisition, Salesforce expects improvements to integration and intelligence on Marketing Cloud.
- Also in July, Salesforce announced new Einstein and Lightning capabilities for Service Cloud. Einstein Bots for Service are automated bots to respond to basic customer queries or gather relevant information for human agents. With Lightning Flow for Service, companies can deliver automated and standardized business processes to guide users through self-service workflows. Einstein Next Best Action leverages a combination of business rules and AI predictions to provide contextual insights to sales and customer service teams in real time, analyzing historical data to recommend an action most likely to lead to sales or customer retention.
- In September, Salesforce announced new CRM functionality to Sales Cloud and Pardot: High Velocity Sales for Sales Cloud includes sales cadences and work queues, Salesforce Billing enables customers to manage their Salesforce subscription directly within the Salesforce ecosystem. It now offers usage-based pricing, evergreen subscriptions that automatically renew, and flexible invoicing. Additional Einstein capabilities were implemented on Pardot such as Einstein Campaign Insights and Einstein Behavior Scoring.
- On September 18, Salesforce announced Quip Slides. With documents, spreadsheets, chat, and now slides, Quip delivers a single canvas that empowers teams to collaborate and make decisions faster than ever. Additionally, with deeper Salesforce and third-party integrations with Box and Dropbox, teams can embed even more live data and tools within Quip.

Salesforce moves even further toward the top of the Leader quadrant of this edition of the Value Matrix due to its continued investment in improving product usability and functionality ahead of the pace of the market and similar competitors.

SATUIT TECHNOLOGIES

Satuit Technologies offers cloud-based and on-premise CRM solutions, built specially for financial services clients including private equity and hedge fund managers, wealth managers, institutional asset managers, and funds distribution. The solution is equipped with core CRM functionality and contains additional tools specific to the financial services industry to manage the extensive compliance and legal requirements characteristic to that industry.

In March, Satuit announced its Winter '18 release which is expected to provide improvements to the user experience. The home page is now fully customizable and can be populated with information and graphics most important to the user. It can be manipulated in a highly-usable drag-and-drop environment, making it accessible to even non-technical users. Dashboards and graphs will now be integrated directly into the application, while before they were accessed in a separate window which hindered user productivity. Additionally, the search bar has been upgraded to handle searches across all record types.

In September, Satuit announced its Summer '18 release which focuses primarily on data visualization with additional functional improvements to data handling and analytics. Client and customer engagement metrics are enabled, and new pipeline visualization tools allow sales teams to strategically optimize their efforts to the most profitable accounts. Managers have full visibility into up-to-date activity records for each account. Functionally, Satuit included new tools to support data import and management, as well as additional analytics capabilities.

Satuit is positioned in the Leaders' quadrant of this matrix due to continued investment in its product to deliver improved usability and increased functionality to customers.

VEEVA SYSTEMS

Veeva Systems is one of the few vendors in the Matrix that is specifically focused on one vertical: life sciences. Veeva Systems was founded on the Salesforce platform as a Salesforce partner and now delivers capabilities for clinical trial data management, content management, customer reference data, master data management, and other industry-specific capabilities critical to the life sciences industry. Veeva CRM products include Veeva CRM MyInsights for data visualization and Veeva CRM Engage Meeting and Webinar for remote interaction. Veeva updates its products every four months, in line with most other CRM vendors' release cycles.

In August, Veeva announced the release of Veeva CRM 18R2. This release includes the new Sunrise UI to improve user experience across device types, and upgraded CLM functionality

including Favorites, Recents, and tabular view for easy data exploration. Veeva CRM for iPhone grants users mobile access to their information.

Due to its construction on the Salesforce platform, significant investment in UI improvements, and additional vertical-specific capabilities for the health sciences field, Veeva moves into the Leaders quadrant of this Matrix.

FACILITATORS

Facilitators in the Matrix include Acumatica, Hubspot, Infusionsoft, IQVIA, SAP C/4HANA, and Sugar CRM.

ACUMATICA

Acumatica is primarily an ERP provider; however, it is included in this Matrix because Nucleus has found that customers can rely solely on Acumatica technology to meet their CRM needs. Acumatica CRM and ERP solutions are both integrated on the same backend database which ensures accurate records across departments and no double-entry of data. Acumatica solutions are most commonly used by small and medium-sized business (SMB) customers primarily in the retail, wholesale distribution, service, manufacturing, construction, and technology industries. Acumatica offers solutions for sales automation, marketing automation, service and support automation, and customer self-service as well as e-commerce through its Magento partnership.

CRM upgrades, announced in September at the Acumatica 2018 R2 Launch Event, include the following:

- Integration with Microsoft Outlook that will connect email activities with any contact in the system.
- Improvements to data discovery and access such as a new Portal that allows users to display financial documents associated with any company or branch. New GDPR compliance tools are included in the release to ensure secure handling of data on the platform.
- The system is now configured to support omni-channel sales. The update includes additional sales order processing workflows so that transactions from online systems and transactions entered by salespeople can be processed differently.

Acumatica demonstrates its commitment to delivering a quality CRM solution with regular product improvements and is poised to move right in future Matrices as it shows further efforts toward delivering additional advanced functionality to users.

HUBSPOT

HubSpot is a provider of cloud-based sales and marketing automation solutions. It has historically catered to SMBs, but recent activity suggests it is looking up-market to grow its customer base and mature its products. For paying customers using its marketing automation solution, HubSpot offers its sales force automation (SFA) tools for free.

It recently announced the launch of enterprise-level products that were released on September 5. New features and capabilities include:

- HubSpot's Marketing Hub Enterprise will receive upgraded analytics and support custom bot building.
- The Sales Hub Enterprise will include Sales Playbooks, custom curated libraries of resources and best practices for sales teams, phone call transcription, eSignature, and quota management tools.
- The Service Hub Enterprise will be equipped with tools to track against service level agreements (SLAs) and other metrics. The Service Hub Starter will offer Tickets, which is the ability to create a help desk and turn customer communication into service tickets that can be tracked and managed.
- HubSpot Video will be available across the entire HubSpot platform. It includes video hosting, in-video calls-to-action and forms, and a video creation tool. Marketers will be able to manage video content directly within HubSpot, sales teams can create and share video to create personalized customer experiences, and service teams can help customers more naturally with help videos created and shared directly from Service Hub.
- HubSpot CMS is an integrated web creation tool that allows users to easily create custom web pages without code using drag-and-drop editors and use smart tools to leverage HubSpot CRM data to deliver personalized experiences for each website visitor.

With its focus turned up-market on enterprise customers, HubSpot has made some improvements to the functionality of its product with emphasis placed on enabling more advanced analytics in its enterprise-class products. However, it lacks the resources of many leaders to invest in keeping pace on functionality.

INFUSIONSOFT

The Infusionsoft platform brings CRM together with marketing automation, e-commerce, and payments for 180,000 small business users. By organizing all customer interactions in one place and making it easy to connect Infusionsoft with thousands of other apps, small businesses can automate key customer activities and work intelligently to deliver more personalized service and close more business. In May the company announced a simplified

version of its platform designed to meet the needs of solopreneurs and the broader small business market. New features in the platform include:

- Over 50 industry-specific marketing templates that businesses can use to guide their marketing efforts.
- A redesigned user interface designed to be simpler and easier to use.
- Integrations with hundreds of leading business apps to unify data and simplify the user experience.
- Visualizations such as a drag-and-drop pipeline management tool allow users to track progress toward sales targets.
- Automated workflows allow users to refocus on value-add tasks and deliver personalized experiences to customers.
- A 14-day free trial for new users – no credit card required.

In the fall Infusionsoft will announce new capabilities focused on simplifying more small business jobs like Quotes, Invoices, Appointments, Calendars, and Payments, which are likely to influence their position in the next Matrix.

IQVIA

IQVIA differentiates itself from other CRM vendors with its Orchestrated Customer Engagement (OCE) platform, described by IQVIA as a new category of technology that allows businesses to leverage an “orchestrated commercial model” across all of its customer-facing functions. This is a “platform-of-platforms” strategy that combines the company’s expertise in the health and life sciences with industry-standard platforms, partnerships with best-of-breed component and technology vendors, and disruptive technologies like AI.

Since the last publication of this Matrix there have been no additional announcements regarding the product.

IQVIA’s position in the Facilitator quadrant is degraded slightly from the last publication of the Matrix since the lack of additional product improvements show that it is lagging behind competitors. However, Nucleus expects additional organic investment (beyond its partner strategy) will pay off in future Matrix positioning as customers are fully deployed.

SAP C/4HANA

In June, it was announced that SAP Hybris Cloud for Customer has been rebranded by SAP, with its component cloud products now included in the SAP C/4HANA suite. The C/4HANA suite consists of SAP Marketing Cloud, SAP Commerce Cloud, SAP Service Cloud, SAP Customer Data Cloud, SAP Sales Cloud (formerly SAP Hybris Revenue Cloud and SAP Hybris Cloud for Customer), and the recently acquired CallidusCloud portfolio.

The move serves to consolidate SAP's acquisition portfolio with existing database technologies in a new full-service CRM offering. SAP C/4HANA goes beyond traditional sales-focused CRM and connects the customer experience to the actual supply chain for improved communication, visibility, and transparency. The solution is natively integrated with SAP S/4HANA, its ERP suite, and supports machine learning capabilities from SAP Leonardo. SAP HANA Data Management Suite is included with C/4HANA to enable data-driven applications by providing one secure, unified location to orchestrate data.

With SAP C/4HANA, Nucleus sees SAP as a Facilitator on this Matrix, due in part to it embracing the market trend toward full suite products. Through complete integration with ERP software, SAP looks to deliver high cross-functional usability throughout the entire business, although its functionality remains lacking compared to some Leaders in terms of code-free object creation and advanced analytics.

SUGAR CRM

Sugar CRM delivers a simple but highly-usable core CRM application with end-to-end functionality to support the entire business across sales, service, marketing, and customer support. Its Hint relationship intelligence tool delivers data-driven contextual insights to sales and service teams in the workflow. The product is designed with a focus on the user interface, with the belief that for business tools to be most effective, they should resemble the consumer applications that are so ubiquitous in everyday life to drive user adoption.

Announced on July 12, the Summer '18 release is centered around the following main themes:

- **Collaboration.** Improved reporting with over 100 available report types; 60 of these reports include charts and graphics for data visualization. Streamlined internal distribution channels allow users to share reports more quickly than was possible in previous versions.
- **User Experience.** Automatic email archiving, advanced custom workflow design, relationship tracking functionality where actions can be triggered based on activity across multiple records. Sugar facilitates human connection via its software with processes that combine human action with automation as well as emoji support to add a personalized touch to emails within Sugar.
- **Data Privacy.** Double opt-in is supported to ensure that user data is only collected when the appropriate permission is given. Users can see and erase any personal information left across activity streams.

In August, it was announced that private equity firm Accel-KKR made a significant strategic investment in SugarCRM to enable its next phase of growth. Accel-KKR has a long track record of driving growth in portfolio companies. With the partnership, Sugar is looking to mature its capabilities in lead management and marketing automation, artificial intelligence and advanced analytics, and tools for customer support.

Nucleus places Sugar in the Facilitator quadrant of the Matrix due to its track record of prioritizing the usability of the platform instead of advanced functionality. This momentum is shifting as Sugar looks to continuously add new capabilities to the platform such as more sophisticated automation and improvements to the Hint relationship intelligence platform.

CORE PROVIDERS

Core providers in the Matrix include Indegene, Maximizer Software, Sage CRM, and Zoho.

INDEGENE

Indegene offers customer engagement for life sciences with coverage across all sectors of the healthcare industry. Through a strategic partnership with Microsoft, Indegene Omnipresence, leverages Microsoft technology such as Dynamics 365 CRM and Azure data and analytics to deliver advanced functionality specific to the healthcare vertical. Indegene differentiates itself by enabling advanced functionalities with a particular focus on industry-specific advanced analytics, cognitive capabilities, and natural language processing (NLP). Other features include integration with social platforms such as LinkedIn (through Microsoft Dynamics) for customer engagement and creation of custom AI-powered bots to handle repeatable tasks or customer queries, including medical inquiries.

Indegene positions itself as a cross-functional organization that acts as a digital transformation business partner with healthcare-specific best practices and content creation to help its partner organizations grow. Additionally, its all-inclusive pricing strategy makes it an attractive option for organizations looking for a different business case.

As a young vendor still growing its customer base and expanding the platform capabilities, Indegene is positioned as a Core Provider in this Matrix. If it continues the pace of expected development in additional transactional capabilities, Indegene is on track to move into the Facilitator quadrant in the future.

MAXIMIZER SOFTWARE

Maximizer CRM delivers industry-specific sales, marketing, and customer success capabilities to SMBs including dedicated platforms for financial services and manufacturing. With industry-specific versions available, the need for custom configuration is decreased which allows Maximizer to offer complete CRM solutions at a lower cost. Since the last Matrix, there haven't been many significant product releases or feature upgrades; however, the new 2019 version, due October 17, delivers total pipeline management with a new lead module and a dedicated native mobile Sales app available for iOS and Android.

On June 14, Maximizer announced a new integration with QuoteWerks, a leading sales quoting and proposal software provider. The partnership will allow customers of both companies to accelerate the process of creating quotes, proposals, and sales opportunities by automatically linking data between the two applications.

This partnership shows that Maximizer is looking to expand the breadth of its business tools to reach new customers and deliver an improved customer experience to its existing users. Still, Maximizer has lagged behind the market in differentiating areas like AI and low-code development options.

SAGE CRM

Sage CRM is offered as integrated, modular CRM, available as part of Sage Business Management solutions around the globe. Providing CRM functionality out-of-the-box, with rich configuration capability, the proposition is at a cost-effective price point, particularly for Sage ERP customers in the midmarket that require the core CRM functionality covering marketing, sales, and service functions within a typical business. Customers looking for next-generation features like AI and low-code frameworks can take advantage of the Sage integration with Salesforce via the app cloud.

ZOHO

Zoho competes primarily in the SMB market with its low-cost all-in-one suite of applications for business, Zoho One. The suite offers cloud-based solutions for sales and marketing, e-mail and collaboration, business process management, finance, IT and help desk, and human resources in addition to integrated point applications for extended functionality. Since the last publication of the Matrix, Zoho has made aggressive moves to increase brand awareness and target up-market clients to grow its footprint. Recent activity relevant to its positioning on the Matrix include:

- In August, Zoho announced additional capabilities for the Zoho One platform including the inclusion of its AI-powered sales assistant Zia on Zoho One, a new Zoho One Analytics tab that allows users to create reports and monitor progress with dashboards and KPIs. Zia Search is an intelligent search tool that allows users to search for information across all applications and provides next action recommendations based on context from the data. Backstage, an end-to-end event management solution, is a new application added to the Zoho One portfolio.
- In August, Zoho also announced strategic partnerships with Uber and T-Hub. T-Hub is a startup incubator and per the terms of the partnership, all of the T-Hub startups will receive free one-year subscriptions for Zoho One. The partnership with Uber enables an integration that automatically imports the user's Uber receipts to Zoho Expense to allow for streamlined expense tracking and reimbursement.

By targeting up-market customers with an aggressive new marketing campaign and incorporating edge technologies like AI, Zoho is clearly developing its product to be more functional while being sure not to sacrifice the usability that attracted their core SMB customers in the first place. However, it is positioned as a Core Provider in this Matrix because the CRM-specific capabilities included in the Zoho One suite remain fairly basic.

EXPERTS

Experts in the Matrix include NexJ, Oracle Siebel CRM, Pegasystems, and SAP.

NEXJ

NexJ is a customer process management-focused CRM solution for the financial services and insurance industries, providing client onboarding, Know Your Customer (KYC), and customer data and analytics solutions. The company has not made any significant announcements or product releases since the publication of the previous Matrix. Although NexJ lacks the access to capital or deep developer bench of larger, more entrenched CRM vendors, its track record of investment in AI and other edge technologies justify its position as an Expert in this Matrix.

ORACLE SIEBEL CRM

Oracle Siebel CRM delivers functionality for sales, marketing, service, loyalty, commerce, customer master, and social automation. As one of the most mature CRM products on the market, Siebel CRM has the most breadth of capabilities and is equipped with extensive industry-specific functionality for verticals including: banking and insurance, communications and media, utilities, high technology, public sector, transportation, retail, life sciences, and hospitality.

Although Oracle CX Cloud is Oracle's primary go-to-market CRM product, there are no current plans to retire the Siebel CRM line. Although the product falls behind in usability, it is placed in the Expert quadrant due to continued investment in process automation, AI, data visualization, and enhanced analytics; product functionality is on-par or above some of the most feature-rich options available.

PEGASYSTEMS

Pegasystems provides industry-specific CRM capabilities for sales, marketing, and customer service. Its primary areas of investment are AI and robotic automation, which are key differentiators for its new CRM product, Pega Infinity.



In June, Pega announced the replacement for Pega CRM Suite, Pega Infinity. This suite contains the marketing, sales, and service solutions along with Pega Customer Decision Hub to offer a single unified platform for CRM. Support for custom robotics is automatically embedded on the platform. Pega Self-Optimized Campaigns leverage AI to automatically identify the optimal audience and deploy the campaign in self-monitored “waves” to reach each customer in the most ideal way. Natural language processing (NLP) is built into email to identify content and sentiment within messages, and AI-powered OCRs scan and contextualize attached documents. With Pega Infinity, Pega is an early adopter of blockchain technology through an integration with Ethereum, offering the solution to streamline the document-heavy “know your customer” onboarding process.

With these functional improvements, Nucleus sees Pega targeting growth and looking to expand its positioning in the CRM space. However, as a leading adopter of edge technology like AI, blockchain, and NLP, overall usability may suffer as customers find themselves unsure how to best leverage these new capabilities.

SAP

SAP provides on-premise CRM functionality primarily for SAP ERP customers, with capabilities for sales, marketing, service, partner and channel management, case management, loyalty management, and trade promotion management. SAP has released its new primary go-to-market CRM offering with SAP C/4HANA and is likely looking to migrate customers onto that platform with support for SAP CRM set to expire in 2022. Most SAP customers are increasingly looking toward cloud CRM solutions instead of a move to SAP on-premise, and this is unlikely to change.