

Market Overview: Enterprise Sales Force Automation Solutions

by Fraser Tibbetts and Kate Leggett, December 15, 2014

KEY TAKEAWAYS

Sales Professionals Demand New Functionality From SFA Software

To be effective in their role, sales reps demand the following: the right content and insight at the right time; access/deep integration with office productivity tools; visibility into customer service requests and marketing campaign results; and navigation and user experience that is up to par with consumer applications.

Warning: Your Sales Teams Will Self-Provision If SFA Is Outdated

Failure to provision your sales teams with the right software results in disparate purchasing activities by sales executives, supported by fragmented technologies. Consolidation brings with it obvious commercial benefits as well as more effective reporting and sales efficiency. Today, SFA software is a critical part of the sales pro's arsenal.

Four Key Questions Will Guide Your Analysis Of Available Solutions

To ensure you select the right solution, you should ask: What selling needs do we want this solution to address? Do we want standalone SFA or a full customer relationship management (CRM) suite? Do we want a solution deployed as software-as-a-service (SaaS), on-premises, or partner hosted? How large is the sales team this solution will support and where are they located?

Market Overview: Enterprise Sales Force Automation Solutions

Today's Solutions Are Changing The Nature Of Your Customers' Interactions With Your Sales Department

by [Fraser Tibbetts](#) and [Kate Leggett](#)
with [Stephen Powers](#) and Arelai Ephraim

WHY READ THIS REPORT

The sales force automation (SFA) market is undergoing significant change with increasing emphasis on mobile sales capability, integration with other software products, real-time actionable insight, and usability approaching that of consumer-grade applications. Application development and delivery (AD&D) professionals need a list of representative vendor solutions that align to the solution type which best supports their organization's broader business technology (BT) agenda. This report details the ecosystem of SFA technology providers with which AD&D pros should be familiar, and the relative capabilities of available solutions.

Table Of Contents

2 The SFA Solution Market Continues To Expand And Evolve

My Sales Team Already Has Software . . . Do I Really Need An Upgrade?

Functionality To Look For In A Solution

5 Choose The Right Solution To Meet Your Sales Teams' Needs

Large Selling Team Focused Solutions

Midsized Selling Team Focused Solutions

Vertically Focused Solutions

RECOMMENDATIONS

13 Map Out Integration Requirements And Key Stakeholders

13 Supplemental Material

Notes & Resources

Forrester interviewed 21 vendor and user companies: Aptean, Base CRM, Blackbaud, bpm'online, CRMnext, FrontRange Solutions, Gainsight, Infor, Microsoft, NetSuite, NexJ Systems, Oracle, Prolifiq Software, ROIInnovation, Salesforce, SalesNOW, SAP, SugarCRM, Tour de Force CRM, TrustSphere, and Veeva Systems.

Related Research Documents

[The Sales Enablement Execution Landscape](#)
September 4, 2014

[Navigate The Future Of CRM In 2014](#)
February 21, 2014

[TechRadar™ For AD&D Pros: The Extended CRM Technology Ecosystem, Q1 2013](#)
January 29, 2013



THE SFA SOLUTION MARKET CONTINUES TO EXPAND AND EVOLVE

Since its inception as contact management software two decades ago, sales force automation (SFA) software has continuously evolved to meet the new requirements of sales representatives. Today, SFA solutions manage a myriad of previously manual activities, including: account and contact management, opportunity tracking, product and pricing tools, lead generation/qualification, and quota and compensation analysis. For sales managers, solutions now include territory management functionality, reporting and analytics, sales training and performance tools, and customizable workflows to support guided selling. These tools increase a sales organization's productivity with quicker access to the right data and actionable insights so that they can focus their efforts on the deals most likely to close. This, in turn, frees sales professionals to focus on value-add activities that lead to top-line revenue growth.

The majority (61%) of software decision-makers we surveyed at enterprise-size firms in 2013 reported that they already had a packaged SFA solution in place or that they had plans to implement one. Nineteen percent reported that they are expanding/upgrading their implementation.¹ As software decision-makers, AD&D pros supporting sales operations have responsibility for SFA. Simultaneously, an increasing number of sales enablement tools are emerging to fill the gap between current SFA capabilities and the functions salespeople are requesting. However, SFA providers are quickly following suit and either building in similar functionality into their new releases or partnering with other vendors.

To be effective in their role, sales reps demand:

- **The right content at the right time.** Sales enablement tools help sales pros with other aspects of selling like product and strategy decks and customer testimonials. They provide links right from the SFA solution to content geared to that product or the client's industry. Solutions can suggest current clients who would be the best fit to provide a testimonial to the prospect. Content management solutions integrate with the SFA system to help sales professionals track client engagement with marketing materials in real time. For instance, an outside sales professional can use them to run through their pitch deck and automatically record how long the client engaged with each piece of content and mark which ones helped the most.
- **The right insight, in real time.** Some SFA solutions run analytics on a given client's current product portfolio and provide suggestions about upsell and cross-sell opportunities in the account dashboard, so that the salesperson can see them during the regular course of interacting with that account record. Organizations deploy advanced analytics and big data platforms in tandem with SFA and CRM solutions to help reps build advanced dashboards to better understand the client. Examples include relationship mapping and reporting tools leveraging data living outside the CRM, and lead scoring to help reps focus on deals most likely to close.

- **Integration with office productivity tools, customer service requests, and marketing.** A sales rep must know who else might be in contact with any given account. They must also have full visibility into any outstanding service requests or marketing campaigns related to that account. SFA solutions that are part of a larger CRM suite provide this visibility, but only if customers leverage the full suite of offerings available to them. Other solutions help bridge the gap between systems outside of a suite by building add-ons into the email or calendar client that allow the user to add and edit contacts as well as log emails, meetings, and calls with one click.
- **Navigation and user interfaces (UIs) up to par with consumer applications.** The “consumerization” of enterprise applications is pushing SFA providers to simplify the dashboards and user interfaces. The rise of SaaS SFA enables more frequent UI updates, while the increasing importance of mobile capability to sales pros drives SFA vendors to invest in more responsive design and native mobile applications. In a break from the standard object-oriented navigation, some solutions are organizing functionality from different applications into active verb, task-oriented interfaces to make it quicker to accomplish tasks.

My Sales Team Already Has Software . . . Do I Really Need An Upgrade?

Many companies already have a SFA solution today, leaving some buyers wondering why they need to purchase a new one. There are some important reasons for why sales pros should consider updated or upgraded SFA software, including:

- **SFA tools are an essential part of effective sales processes.** As firms compete today for customers with more choices than ever, your teams must have every edge available. Though the most updated SFA solution might have been a “nice to have” five years ago, it is quickly becoming a “need to have” today. Take stock of what new capabilities are becoming standard in solutions on the market today and consider how those might have an impact on your top-level revenue if implemented well. In the age of the customer, the impact of SFA solution on your sales teams’ ability to earn customer loyalty cannot be understated and should be top-of-mind.
- **You need to act, or your sales pros will.** Failure to provision sales teams with simple, mobile, insightful software results in disparate purchasing activities and fragmented technologies. The obvious commercial benefits of group negotiation, as well as the simplification of the technology ecosystem should be enough motivation to reexamine your solution and ensure it is meeting all of your firm’s selling needs. If not, consider that fragmentation also means that some sales teams and individual reps will have islands of customer data not accessible by the rest of the organization, making tasks like pipeline management a nightmare of complexity.
- **Integration with your CRM brings new insights.** Organizations can purchase SFA solutions standalone, yet they are often subsets of more comprehensive CRM suites. By ensuring that you can aggregate marketing, sales, and service data, you can gain valuable insight into your

customer's digital journey with your firm. Reporting and analytics become richer when they use data from systems outside SFA, and thoughtful integration can create the opportunity to build more useful reporting. This will create more actionable insights on how to serve customers more effectively.

Functionality To Look For In A Solution

Before deciding on any one SFA solution, map your requirements at a high level to decide on the type of solution — before you choose any specific provider. This cannot be done in a vacuum involving only stakeholders on the sales team or on the technology management team. Rather, all stakeholders (technology management, sales leadership, and representatives from the end user sales professionals) must sit down together to answer four key questions before proceeding:

- **Are our selling needs simple or complex?** Surprisingly, this is often the most difficult question to answer. If your selling needs are relatively simple (e.g., contact management, leads and opportunity management, simple forecasting) then you may be satisfied with a basic, relatively inexpensive solution. Customers with complicated selling needs (e.g., territory management, sales campaigns, quota and compensation analysis, advanced workflows, partner relationship management) may need a more sophisticated or customizable on-premises solution. Another important factor is how essential mobile capability is to your sales team as some solutions have more mature mobile offerings than others.
- **Do we want standalone SFA or a full CRM suite?** When choosing a SFA solution, take into account other CRM needs before deciding. If you also would like to replace your customer service and support (CSS) or lead-to-revenue management (L2RM)/marketing automation software, then you'll want to consider a holistic CRM solution. Some solution providers, like Oracle, SAP, Infor and NetSuite, have popular ERP solutions that then integrate well with their associated SFA and CRM solutions to provide a complete view of customer interactions and transactions.
- **Do we want an on-premises, SaaS, or partner-hosted solution?** Organizations have fewer customization options with multitenant SaaS solutions but they can deploy SaaS more quickly than traditional on-premises systems. If faster feature delivery of new features and lower maintenance are important factors then consider SaaS over on-premises deployment. Otherwise, you can choose to buy an on-premises or private cloud solution which lends itself to greater customization but less frequent updates.
- **How large is the sales team, and where is it located?** Ensure you've identified the right market segment for your sales team. The size of your sales team that needs support and how much you forecast it to grow in the next three to five years will help you understand if you should choose between enterprise (more than 100 salespeople, often in the multiple hundreds)

and mid-market focused solutions (100 or fewer). Your choice in provider will also depend on the geographies and languages you need to support as some solutions will feature more comprehensive language and currency support.

CHOOSE THE RIGHT SOLUTION TO MEET YOUR SALES TEAMS' NEEDS

Vendors in this market focus on three segments: solutions focused on large selling teams, midsized teams, and solutions built with a specific vertical focus. We have highlighted the high-level capabilities of representative vendors in each space and summarized key facts in accompanying tables.

Large Selling Team Focused Solutions

These solutions support deployments in the hundreds to thousands and feature mature functionality for the management of large selling teams. The SaaS products listed here are also suitable for mid-market deployments and come in tiered editions so that buyers at this level can choose how much functionality to purchase (see Figure 1).

- **Microsoft Dynamics CRM.** Microsoft has traditionally targeted this product to the mid-market but is rapidly increasing its footprint in the large enterprise. Microsoft Dynamics CRM has robust SFA capabilities, and is offered in several packages with varying functionality. The Professional edition is best suited to sales professionals seeking only SFA functionality, as opposed to full CRM functionality. Their cloud offering is the most popular today (roughly two-thirds new customers are currently adopting it) and comes in at a very aggressive price point for the capabilities it brings to the table. They embed InsideView into their product to bring in social data and world news connected to the account or client. For clients using other Microsoft applications, the system integrates with Exchange servers and Microsoft Office applications, helping sales teams increase their productivity. They continue to invest in mobile SFA with the current version featuring a clear, modern UI, as well as usable sales and management reporting.
- **Oracle Sales Cloud.** Oracle positions Sales Cloud as the main cloud SFA application in its CX product portfolio. Oracle built it on the Fusion platform. Oracle Sales Cloud has connectors to Oracle's ERP products (JD Edwards, eBusiness Suite) and Siebel, and supports usage scenarios where, for example, Siebel powers customer service capabilities and Sales Cloud powers sales capabilities. The solution features a modern UI, which supports task-based user experiences and in-line dashboards and reports to enhance sales productivity. Oracle designed the solution with a mobile-first mindset, and offers offline sync, on iOS, Android, and BlackBerry. Oracle also offers industry-based solutions. Customers seeking SFA solutions with strong CPQ integration should consider Oracle's Sales Cloud in combination with CPQ Cloud (based on BigMachines).

- **Salesforce Sales Cloud.** Salesforce Sales Cloud offers a comprehensive set of SFA capabilities. This SFA solution differentiated with sales executives early on through usability. Reporting is robust and easily customizable at the individual user level and business analysts have tools to customize fields and workflows. With thousands of add-on solutions, their AppExchange is one of the larger marketplaces for third-party business applications, which extends the capability of the product even further. Salesforce's Salesforce1 mobile platform is available on iOS, Android and Windows Mobile and features robust APIs. Though historically deployed at a team or divisional level, deployments have steadily become much larger — even companywide — as the solution has increased in popularity. However, this all comes at a price as Sales Cloud is one of the higher-priced SaaS offerings in the market today.
- **SAP Cloud for Sales.** SAP's Cloud for Sales is part of SAP's Cloud for Customer Engagement portfolio which includes solutions for sales, marketing, service, commerce, and social engagement. SAP built these cloud solutions on a common SaaS architecture using the SAP Hana Cloud Platform, leveraging common application services, such as reporting and predictive analytics, security, integration, and collaboration. SAP Cloud for Sales is a comprehensive sales application and has been designed with a mobile-first approach; it can be deployed stand-alone, but it can also extend the native capabilities of SAP CRM and is fully integrated with SAP ERP.
- **SAP CRM Sales.** SAP CRM Sales is an on-premises solution for SFA. It is part of SAP CRM and the SAP Business Suite (which also includes SAP ERP). SAP CRM supports functionality for sales, a wide range of industry-specific capabilities, platform and architecture, and the ability to support global enterprises. Usability has been significantly improved in recent years. Clients currently using SAP CRM Sales that want to move to SAP Cloud for Sales can do so without giving up their other SAP CRM marketing or service. SAP CRM Sales is a good choice for professionals who want an on premises solution that can support end-to-end industry processes, and whose organization is already committed to SAP's ERP platform. SAP CRM can also be made available in a private cloud (Hana Enterprise Cloud).

Figure 1 Consider These Factors When Choosing A Solution Focused On Large Selling Teams

Solution	Average deployment size (users)	Largest deployment size (users)	Number of SFA customers	Deployment options (SaaS, on-premises, partner hosted)	Top verticals (by revenue)	Geographic focus (based on client HQ)
Microsoft Dynamics CRM	100*	>55,000*	>30,000*	SaaS, on-premises, partner hosted	Manufacturing, financial services, public sector, professional services*	Global*
Oracle Sales Cloud	100 to 200*	>10,000*	>650*	SaaS	High-tech and industrial manufacturing, financial services, communications, consumer packaged goods*	Global
Salesforce Sales Cloud	50 to 100*	>100,000*	>100,000*	SaaS only	High tech, life sciences, communications, media*	Global*
SAP Cloud for Sales	300 to 400	>60,000*	>300	SaaS only	Manufacturing, process industries, and professional services*	Global
SAP CRM Sales	200 to 300*	>20,000	>2,000	On-premises, partner hosted	Manufacturing, process industries, and professional services*	Global

*This denotes a Forrester estimate where exact information was unavailable. For the vertical concentrations, the estimates represent Forrester's opinion of current focus and not necessarily revenue.

Midsized Selling Team Focused Solutions

Providers in this category have historically focused their offerings at the midsized teams of 100 or fewer. However, most have larger deployments as well and architectures that make them suitable for larger scale deployments (see Figure 2).

- **Aptean's Pivotal CRM.** Pivotal SFA is part of Pivotal's CRM suite but organizations can also deploy it as a standalone module. Aptean offers two editions that can both be deployed on-premises as well as in the cloud (using Amazon cloud services). Pivotal SFA embeds social data from prospects into the user's daily hub and is highly customizable to let buyers build a system to fit their specific selling process. Customers of Aptean's ERP products will find integration with Pivotal attractive. Pivotal has a native iOS product that interfaces with the system at the server level as well as supporting BlackBerry, Windows Mobile, and Android. Its reporting engine integrates with Microsoft productivity applications. Professionals in the financial services, home building and real estate, manufacturing, and healthcare should note that Aptean offers industry-specific CRM functionality in those verticals.
- **Base CRM.** Base CRM is a newer entrant to the SFA market, entering in 2009. Even though they've been successful in the SMB market, they have larger deployments in midsized companies. Base has invested heavily in its mobile capabilities, targeting its highly usable solution to outside salespeople in medium-sized selling organizations. The mobile app (native on Windows Phone, iOS, and Android) can automatically log calls and recordings, allowing salespeople to capture salient information effortlessly after a meeting. Base also offers simple lead-capture forms users can deploy on their company website and a clipping tool to copy leads with one click from Facebook or LinkedIn. Base offers reports to help optimize sales performance and forecasting, helping sales reps focus on opportunities most likely to close. Sales teams that generate high lead volumes and use both inside and outside sales reps will find Base CRM appealing.
- **Bpm'online.** Bpm'online offers four editions (team, commerce, enterprise, and omnichannel) which are different mostly in the modules available for sales management. Those management functions that are included as you move up are order management, invoice management, contract management, sales forecasting, agreement management, and territory management. Bpm'online differentiates on process management with customizable workflows and business logic tools. It is on the less expensive side of the spectrum for SFA solutions. This product is an attractive choice for companies with process-centric sales cycles who want to ensure that their sales force is following standardized processes.
- **FrontRange Solutions' Goldmine CRM.** FrontRange Solutions gears its on-premises solution primarily toward SMB and mid-market organizations. However, they have several divisional deployments at large enterprises and are well suited to clients who need only core contact. Goldmine CRM features preformatted reports and a simple, hierarchy-based navigation. It integrates with Microsoft Excel for reporting and Outlook for email. This solution works well

as an inexpensive central system of record and uses a concurrent user model to make it even more attractive to organizations that don't need dedicated licenses. This solution is a good fit for companies who want to outfit one specific division with simple needs or create a custom central database.

- **Infor CRM.** Infor CRM is in a state of change as Infor closes the acquisition of Saleslogix from Swiftpage (who bought it from The Sage Group in early 2013).² Saleslogix will bring advanced, task-oriented mobile capabilities to Infor CRM. Infor CRM has industry-specific solutions and can be deployed via the cloud or on-premises. Infor prides itself on its UI design and leverages its design agency, Hook & Loop, to make its application simple to use and enjoyable to view. Clients already using one of Infor's ERP offerings will benefit from the insight that integration with the CRM can bring them to create a more complete view of the customer. The solution is attractive for professionals with relatively smaller sales forces who prioritize industry specialization and mobile design.
- **NetSuite CRM.** Though historically more targeted toward the mid-market, NetSuite makes the solution easily deployable globally. This solution is distinct in that NetSuite offers both its ERP software as well as its CRM only as SaaS. This differentiates NetSuite as customers of its ERP products can choose to add CRM modules without a separate installation. When bought together, this creates capability to manage the lead-to-order process from inception to billing and compensation. Other capabilities include document management, upsell quote and order management, and incentive compensation management. They have a native iOS application for the iPhone that automatically ports over many customizations made in the desktop environment, though does not support offline data entry. This solution is most attractive to buyers who also use NetSuite for ERP.
- **SalesNOW.** SalesNOW is one of the more affordable SFA solutions on the market and is deployable via the cloud or, less frequently, on-premises. It is possible to enable marketing and service-oriented modules at no additional cost. Microsoft Outlook, Gmail, and direct email integration are also included at no additional cost as are native mobile apps for iOS, Android, and BlackBerry. SalesNOW has CPQ functionality and customizable reports and dashboards as well as team and security structure tools. This solution targets mobile sales teams in the midmarket or at a divisional level who have mobile selling teams and need only core SFA functionality like lead, deal, case, and contact management as well as basic activity tracking and reporting.
- **SugarCRM.** SugarCRM's open platform allows organizations to take a basic CRM platform application and build upon it using their own technology management resources or add-on modules that are available through SugarCRM's partner and developer communities. SFA is part of the greater CRM product, which differentiates on its modern user experience with context-specific activity streams, integrated dashboards and report, and ease of integration with third-party applications through relationships with more than 300 ISVs. SugarCRM offers both native and browser-based applications which all offer offline access. SFA leads roughly three

quarters of SugarCRM deals and pricing is transparent and in line with other leading solutions. Professionals who want to build out extensive customizations but want the flexibility and agility of SaaS should consider SugarCRM.

Figure 2 Consider These Factors When Choosing A Solution Focused On Midsized Selling Teams

Solution	Average deployment size (users)	Largest deployment size (users)	Number of SFA customers	Deployment options (SaaS, on-premises, partner hosted)	Top verticals (by revenue)	Geographic focus (based on client HQ)
Aptean's Pivotal CRM	300 to 400	>7,500	>1,000	SaaS, on-premises, partner hosted	Industrial manufacturing and chemicals (20%), financial services (12%), retail (10%)	Global
Base CRM	0 to 50	250	>5,000	SaaS only	Software (24%), agencies (17%), consulting (12%)	NA-centric
bpm'online	50 to 100	>5,000	>3,000	SaaS, on-premises, (partner hosted by special agreement)	Financial services (35%), real estate (14%), retail and wholesale (11%)	EMEA-centric
FrontRange Solutions' Goldmine CRM	0 to 50	>600	>100,000	On-premises	Manufacturing, healthcare, BFSI*	NA-centric
Infor CRM	50 to 100	>3,000	>2,000	SaaS, on-premises, partner hosted	Financial services, distribution, auto, public sector and manufacturing*	NA-centric
NetSuite CRM	100 to 200*	>1,200	>14,000*	SaaS	Services, manufacturing and wholesale distribution and high-tech*	Global*
SalesNOW	0 to 50	4,000	>1,500	SaaS, on-premises, partner hosted	Financial services (20%), manufacturing (15%)	NA-centric
SugarCRM	0 to 50	>60,000	>6,000	SaaS, on-premises, partner hosted	Manufacturing, services industries*	Global*

*This denotes a Forrester estimate where exact information was unavailable. For the vertical concentrations, the estimates represent Forrester's opinion of current focus and not necessarily revenue.

Vertically Focused Solutions

Providers in this category have historically focused their offerings at particular industries. These solutions feature workflows, layouts, data models, and business logic and user experiences unique to the industry they target and compete on their out-of-the-box customization to focused business processes (see Figure 3).

- **Blackbaud CRM Solution Suite.** This suite focuses on the nonprofit sector and consists of four offerings: Blackbaud CRM for organizations with complex fundraising needs; Luminate CRM for midtier cause and cure nonprofits; Raiser's Edge for constituent relationship management; and eTapestry for donor management at smaller nonprofits. Clients most often purchase more than one offering because they are geared toward different types of fundraising and business processes. Its mobile solution is web-based. Blackbaud's SFA capabilities are different than most of the other providers in this report as nonprofit workers have very distinct "selling" needs compared to for-profit institutions. Capabilities outside of core contact management include financial data and donor integration, event management, ticket management, volunteer networks, and Internet fundraising.
- **CRMnext.** CRMnext focuses heavily on the banking, financial services, and insurance verticals and is focuses on APAC and EMEA. It is typically deployed on a very large scale (thousands) and targets large and medium enterprises. CRMnext deploys this SFA module most often in combination with the associated customer service or marketing modules. CRMnext aims to make the solution perpetual by ensuring that clients are up to date on the current version through its Autobot upgrade technology. CRMnext has extensive codeless customization options for business systems analyst who want to redesign complex processes, escalations, alerts, dashboards, and workflows. Its mobile offering is based on HTML5 and is platform agnostic. It also offers SMB-focused versions and is aggressively priced.
- **NexJ Contact.** NexJ Contact completely focuses on finance and insurance and sells two editions, one for each vertical. NexJ deployments are usually extremely large, often more than 10,000 users. They are implemented in four of the world's six largest wealth managers (by assets under management [AUM]). They have deep support for industry-specific sales processes such as a hierarchy-based architecture for personal and corporate associations and guided selling forms specifically set up for wealth management products. They feature mobile solutions geared toward wealth managers presenting to potential or current clients and build family relationship hierarchies into the account dashboards. They integrate with Microsoft Outlook so you can log emails from any device and feature a clean, modern UI with customizable tabs that a user can open, drag, and dock. This allows a sales representative to open multiple account and opportunity windows without navigating away from the main dashboard.
- **Tour de Force CRM.** This is an on-premises-only solution, though with subscription pricing models available. It primarily focuses on the distribution and manufacturing verticals. Customers are almost exclusively North American and deployments are on the smaller side —

typically less than 50. It offers an integrated reporting module called BYOR (build your own reports) that lets sales pros use data that has been pulled into the CRM from the ERP or other business system. It integrates via prepackaged connectors with over 40 ERP solutions to deliver a 360-degree view of customer data. The current mobile offering is browser-based and a new version based on HTML5 is in development.

- Veeva CRM.** Veeva CRM is a vertical-specific solution focused entirely on the life sciences industry. It has deep market penetration with 33 of the largest 50 global pharmaceutical companies as well as many small and medium-sized clients. Deployments range in size from fewer than five users to more than 1,000 users. It is only deployed as multitenant SaaS. Sales reps can leverage Veeva Vault (content management system) to ensure compliant content in tandem with Veeva CRM and workflows are suited to the specific selling needs of the industry. Reps can also use the integrated closed loop marketing (CLM) to track engagement back into the CRM system as they are displaying the presentation to the client. Its mobile solutions are built for iOS and Windows with offline synchronization and can also run via any browser. It is built on top of the Salesforce1 platform so customers get Chatter for collaboration and can also leverage the AppExchange for third-party applications.

Figure 3 Consider These Factors When Choosing A Vertically Focused Solution

Solution	Average deployment size (users)	Largest deployment size (users)	Number of SFA customers	Deployment options (SaaS, on-premises, partner hosted)	Top verticals (by revenue)	Geographic focus (based on client HQ)
Blackbaud CRM Solution Suite	50 to 100	>5,000	>14,000	SaaS, on-premises, partner hosted	Family human services (25%), education (higher education, K-12) (23%), healthcare (hospitals) (17%)	NA-centric
CRMnext	>1,000	>45,000	70	SaaS, on-premises, partner hosted	BFSI (70%), media (10%), pharma (10%)	APAC-centric
NexJ Contact	>1,000	>40,000	15	SaaS, on-premises, partner hosted	Financial services (83%), insurance (17%)	NA-centric*
Tour de Force CRM	0 to 50	1,000	>200	On-premises, partner hosted	Distribution (70%), manufacturing (20%), other (10%)	NA-centric
Veeva CRM	>1,000	>20,000*	>150	SaaS only	Life sciences	Global

*This denotes a Forrester estimate where exact information was unavailable. For the vertical concentrations, the estimates represent Forrester’s opinion of current focus and not necessarily revenue.

RECOMMENDATIONS

MAP OUT INTEGRATION REQUIREMENTS AND KEY STAKEHOLDERS

Buyers have more information about your business and products than ever before and to match that information asymmetry a salesperson needs to know everything they can about a lead. This means tying in data about past purchases, billings, customer service requests, social posts, relevant news, and more. AD&D pros must support their sales force by giving them the most information in the right context. Specifically, they must:

- **Start ongoing conversations with your sales teams about SFA requirements.** High-level executives in sales and corporate management will obviously be part of the conversation. But sales operations, field sales and inside sales professionals must also have a voice in any decision to change or enhance your SFA solution. The success of any new SFA initiative will be largely contingent on their buy-in and adoption.
- **Invest in SFA that has the ability to scale with your sales teams.** If your sales team is moving into a new geography or taking on new types of products or selling strategies in the near future, you must evaluate potential solutions in that context. If you are uncertain about your selling needs in the next 12 to 18 months, then consider a SaaS product and resist the temptation to negotiate a multiyear contract until you get more clarity.
- **Enable CRM to integrate with other data sources.** Accessing more data enables your sales teams to compete most effectively. To ensure this integration is effective, AD&D pros must make sure to map out current and future technology purchases before considering any upgrade or new SFA purchase.

SUPPLEMENTAL MATERIAL

Methodology

Forrester's Forrsights Software Survey, Q4 2013, was fielded to 2,074 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during October 2013 and November 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according

to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Forrester, in conjunction with CustomerThink, fielded the Forrester's Forrester/CustomerThink June 2013 Future Of CRM Online Survey to 650 Forrester clients and readers of CustomerThink who had been involved in a CRM technology project as a business professional in sales, marketing, customer service, or IT within the past 36 months. However, only a portion of survey results are illustrated in this document. For quality assurance, we screened respondents to ensure that they met minimum standards in terms of recent CRM project content knowledge and independence from CRM solution vendors.

The online survey was fielded in June 2013. Respondent incentives included a summary of the survey results and access to a Forrester report on customer management topics. Survey respondents were randomly assigned to respond to approximately one-third of 88 CRM technology risk factors in four categories: strategy (business goals and objectives), process (procedures and business rules), technology (applications and infrastructure), and people (organizational structure, skills, and incentives). Exact sample sizes are provided in this report on a question-by-question basis.

Respondents were readers of Forrester's research reports on the topic of CRM as well as readers of CustomerThink and are therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

Companies Interviewed For This Report

Aptean	Infor
Base CRM	Microsoft
Blackbaud	NetSuite
bpm'online	NexJ Systems
CRMnext	Oracle
FrontRange Solutions	Prolifiq Software
Gainsight	ROIInnovation

Salesforce

Tour de Force CRM

SalesNOW

TrustSphere

SAP

Veeva Systems

SugarCRM

ENDNOTES

- ¹ We asked 960 software decision-makers at companies with 1,000 or more employees “What are your firm’s plans to adopt a packaged (not custom) sales force automation (SFA) solution?” and they responded: not interested (21%), interested but no plans (13%), planning to implement in a year or more (8%), planning to implement in the next 12 months (13%), implemented, not expanding (22%), expanding/upgrading implementation (19%), don’t know (5%). Source: Forrester’s Forrsights Software Survey, Q4 2013.
- ² Source: “Infor Completes Acquisition of Assets of Saleslogix,” Infor press release, September 3, 2014 (<http://www.infor.com/company/news/pressroom/pressreleases/SLXFinalized/>) and “Swiftpage to Acquire Sage Act! and Sage Saleslogix Businesses,” Swiftpage press release, February 15, 2013 (<http://www.swiftpage.com/en-us/about/news/Swiftpage-to-Aquire-Sage-ACT!-and-SalesLogix-businesses.shtml>).

About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

FOR MORE INFORMATION

To find out how Forrester Research can help you be successful every day, please contact the office nearest you, or visit us at www.forrester.com. For a complete list of worldwide locations, visit www.forrester.com/about.

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866.367.7378, +1 617.613.5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.



Forrester Focuses On Application Development & Delivery Professionals

Responsible for leading the development and delivery of applications that support your company's business strategies, you also choose technology and architecture while managing people, skills, practices, and organization to maximize value. Forrester's subject-matter expertise and deep understanding of your role will help you create forward-thinking strategies; weigh opportunity against risk; justify decisions; and optimize your individual, team, and corporate performance.

« ANDREA DAVIES, client persona representing Application Development & Delivery Professionals