CRM VALUE MATRIX 1H2018

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THE BOTTOM LINE

Customer relationship management (CRM) vendors are investing in driving productivity gains for both users and developers, with low-code and no-code environments blurring the user-developer line. Leaders in the CRM Value Matrix are augmenting functionality with more embedded analytics and artificial intelligence (AI), and advance in usability both on the desktop and mobile devices. Those who haven't modernized their user interface or made mobile design and configuration accessible for non-developers are lagging the market.

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OVERVIEW

More than any other area of enterprise software, customer relationship management (CRM) has been revolutionized by the cloud. Both in development and upgrade release cycles and the customer relationship, vendors in the space have either grown up with the cloud, learned to embrace it (with varying degrees of success), or continued to lose ground. To be competitive in CRM today vendors need to:

- Deliver ongoing innovation in upgrades that can be easily digested and adopted without the cost and disruption of traditional on-premise software upgrades

- Support a user community that can be effective both for presales evangelism and reference support and ongoing self-support and knowledge sharing

- Support a partner community that can both fill the gaps in functionality and scale internal implementation resources to deliver customer success

- Keep customers happy – and renewing their subscriptions at a more-than-flat subscription rate.

CRM VALUE MATRIX
April 2018

NUCLEUS RESEARCH

The Value Matrix is an assessment of the state of the market and indicates the functionality and usability of a solution. An arrow indicates future movement of a solution relative to others. Solutions without an arrow are projected to keep pace with the increase in functionality and usability expected in the overall market.

Key areas of investment in functionality for CRM vendors in the Matrix include:

- Embedded artificial intelligence (AI) and analytics. All leaders have embedded virtual assistants of some flavor either in products today or on the near-term roadmap. Those differentiating themselves are bringing integration into the mix (with intelligence from outside data sources and communications) and enabling

individual user-level personalization of those capabilities to match the way individuals work.

- Support for "adminlopers." Providing low-code or no-code capabilities that enable business users to tactically address specific CRM processes and challenges, while providing developers and IT governance with a robust platform for not just code development but management, security, and governance are critical. A key battleground for leaders moving forward will be bridging these two worlds, enabling a clean pass off between low-code app builders and developers, and a common way to manage, version, and reuse code and applications from both worlds.

- Integration and orchestration. As departmental CRM deployments grow, the ability to link customer data in a meaningful way across sales, marketing, service, and commerce – and leverage other internal and external data sources – is a big challenge. Leading vendors are investing not just in integration tools but also in innovative ways to link customer data cross systems and applications without the rigidity of traditional master data management (MDM).

- Mobile. All vendors provide some mobile capabilities. Far fewer provide a flexible and usable mobile development environment that takes advantage of the form factors and emerging capabilities of mobile devices.

LEADERS

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

BPM'ONLINE

Bpm'online differentiates its CRM offering through its capabilities as a business process management (BPM) platform that can be effectively leveraged for management process both within and beyond CRM.

- In April, Bpm'online announces version 7.12 with updated predictive scoring, expanded marketing campaign capabilities, extended business process management tools, enhanced low-code integration, and extended analytics and reporting.

- In October 2017 the company announced a new interface for the Bpm'online community to enable community members to more easily share experiences and ask questions.

A key part of the company's strategy for North America has been expanding its network of partners, both through its marketplace of new applications, solutions, and templates, and systems integrators that can support implementations. Nucleus sees these partners – mostly adding Bpm'online to their existing CRM implementation practices – as an important driver of the company's expansion in the North American market.

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 continues to work on bringing Project Max to market (Nucleus Research *r165 – Infor Project Max Update*, September 2017) and fully cloud enabling its CRM offering. Other enhancements to the Suite since the last Matrix include out-of-the-box integration with Marketo (an extension of their existing partnership), bi-directional data sync and Sales Insight for a holistic overview of a lead's journey and behaviors, and embedded mapping services in addition to the geocoding and mapping functionality in Infor CRM Contour.

MICROSOFT DYNAMICS 365

Microsoft Dynamics 365 unifies its Dynamics CRM and enterprise resource planning (ERP) capabilities to provide an integrated set of solutions for marketing, sales, service, finance, operations, and talents that also seamlessly work with Office 365. Microsoft's focus is on bringing the AI and machine learning (ML) capabilities of Azure into the cloud CRM environment while leveraging LinkedIn technology, PowerBI, and PowerApps to provide CRM users with no-code, low-code, and full developer capabilities. In March, Microsoft announced a number of advancements to Dynamics 365 including:

- A common data service for analytics and applications, which will enable customers to quickly customize existing applications built across Dynamics 365 and Office 365 and quickly build new analytics applications that integrate data from multiple sources.

- New capabilities for Dynamics 365 for Sales including a relationship assistant, auto capture with Outlook, and e-mail engagement. Microsoft also announced new Power BI insights apps for out-of-the box dashboards providing further insight into marketing, sales, and service.

- Dynamics 365 for Marketing, a new marketing automation application providing companies with core e-mail marketing needs with integrated capabilities for marketing and sales nurturing.

- Dynamics 365 for Sales Professional, a new streamlined version of the Dynamics sales capabilities with core SFA capabilities as well as sales planning and performance management.

Nucleus sees Microsoft's continued investments in bringing the power of LinkedIn Sales Navigator and Dynamics 365 as a key differentiator. Additionally, PowerApps capabilities and the further integration of Power BI with Dynamics 365 provide business users with more self-service application and report building capabilities leveraging both Dynamics 365 and external data sources.

ORACLE CX CLOUD

Oracle Customer Experience (CX) Cloud Suite includes capabilities 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. Additionally, Oracle's Data as a Service (DaaS) capabilities and Oracle Data Cloud are strong differentiators for both Oracle CRM customers and those using other CRM solutions. Oracle also continues to invest in its Adaptive Intelligent Apps in areas such as marketing, commerce, sales, and service to bring the power of AI to Oracle's CX Cloud Suite for business-to-consumer and business-to-business engagements.

Oracle continues to invest in bringing its multiple CX cloud components together from an integration and management perspective, with Oracle One Cloud initiative (recently announced) to provide unified release schedules and nomenclatures, optimized maintenance windows, outage and service incident communications, and consistent contract and billing policies across all CX products. Oracle has also announced a quarterly cloud update delivery cycle, which will bring it more in line with the cadence expected by Cloud CX customers. Other announcements from Oracle since the last Matrix include:

- Sales Cloud 1HFY19 release including new enterprise mobile and offline capabilities, streamlined partner relationship management (PRM), new prebuilt integrations, and integration with LinkedIn Navigator.

- CPQ Cloud 1HFY19 release capabilities including quote-win probability, deal comparison and price optimization enhancements, and price scoring.

- Service Cloud 1HFY19 release with new capabilities including automatic content classification in Knowledge Advanced, a new business rules editor for managing business rules for custom objects, Mobile Assessment for Field Resources with Oracle Policy Automation (OPA) and Service Cloud Element Manager

- Field Service Cloud 1HFY19 release including enhanced reporting and collaboration, an "access hours" field, and capabilities for more effective resource management such as the ability to temporarily assign resources to different locations and offline access to route maps.

- Commerce Cloud 1HFY19, with enhancements through version 18A, include multi-site and business-to-business site support, enhanced audience for personalization, AI for search and targeted offers, enhancement of A-B testing, and additional third-party integrations.

- Marketing Cloud enhancements to support account-based marketing (ABM) and micro campaigns, support for cross-program events and multi-brand support, a new e-mail editor and sales tools for Microsoft Outlook, and HIPAA and GDPR-related features and security enhancements.

- Continued enhancements to Engagement Cloud, a combined SKU of Sales and Service cloud designed to support both assisted and digital sales and service processes for companies focused on high-touch, high-value relationship service and sales interactions.

Oracle continues to make investments across its broad suite of CX products. Its bigger challenge lies in customer perceptions about working with Oracle – particularly from those that have become Oracle customers through acquisition. Key to being more competitive in the CX space for Oracle moving forward will be the steps it takes to make Oracle "easier to do business with" (with the One Cloud initiative, unified contracts, pricing, and release cycles being an important step).

One Oracle weakness vis-à-vis its major competitors in the space is the perceived lack of a low-code or no-code environment for CX users – although the extensibility framework does allow CX users to configure an application by adding fields and buttons or changing the user interface, it's not perceived as a low-code development environment such as Microsoft's PowerApps. This can limit agility and flexibility and reinforces the perception that ongoing Oracle expertise and a deep developer bench is needed to support the evolving needs of CX users.

SALESFORCE

Salesforce's CRM clouds include Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Analytics Cloud, Industry Clouds (for financial services, healthcare, government, education, and non-profit) the recently-announced Philanthropy Cloud, Commerce Cloud, and the recently-announced Integration Cloud. Salesforce continued to invest in migrating customers to Lightning, its modern UI and development platform, and in bringing its existing clouds to full Lightning feature parity with Classic (its previous version). This is important as customers need to be on Lightning to take advantage of the latest innovations from Salesforce such as Einstein, its AI offering. Salesforce also continues to invest in its Trailhead developer community and online training platform. The company's key announcements since the publication of the last Matrix include:

- In March, Salesforce announced Integration Cloud, leveraging both organic development and technologies from its recent MuleSoft acquisition (announced March 20) to provide users with a more declarative environment for linking both multiple Salesforce clouds and external data. The Integration Cloud components include Integration Platform, Integration Builder, and Integration Experiences to bring data and components from multiple clouds into one user interface. Salesforce also officially announced Lightning Flow, a platform service enabling reusable workflow components. As part of its Trailhead event, Salesforce also announced Einstein Analytics Developer Experience, to enable developers to use Lightning Components to embed Einstein Analytics in custom applications, and Quip Live Apps from third parties so users can easily embed videos, infographics, and other content and collaborative on them within Quip.

- Salesforce also announced it signed a definitive agreement in March to acquire CloudCraze, a business-to-business commerce platform built natively on the Salesforce Platform. The addition of CloudCraze will let Salesforce customers offer the same richly personalized commerce experiences for business buyers that they do for consumers.

- In March, Salesforce announced Salesforce Essentials, a streamlined version of its Sales Cloud and Service Cloud designed for small and medium-sized businesses. With more accessible pricing and a rapid wizard-based configuration tool, Salesforce Essentials helps smaller firms with limited resources quickly come up to speed on Salesforce (Nucleus Research s49 – Salesforce Essentials, March 2018).

- Also in March, Salesforce announced expansion of its vertical capabilities for Health Cloud with enhancements for care management and patient engagement.

- In February, Salesforce began including Salesforce Inbox and Sales Analytics with Sales Cloud Einstein. The new Sales Cloud Einstein offers AI and advanced analytics capabilities to provide intuitive insights and recommendations to sales users seamlessly in the user experience including Einstein Lead Scoring, Einstein Opportunity Scoring, Einstein Opportunity Insights, Einstein Account Insights, Einstein Automated Contacts, Einstein Activity Capture, and Salesforce Inbox.

- In February, Salesforce.org announced a partnership with the United Way to launch Philanthropy Cloud, providing a cloud environment for companies to support and coordinate internal and external fundraising and philanthropy while linking together like-minded employees and community organizations to coordinate volunteer and other efforts. Salesforce also announced a number of new partnerships or partnership expansions including a new Google relationship and expansion of the IBM partnership.

- In November, Salesforce announced myEinstein, including Einstein Prediction Builder for rapid development of AI models to predict outcomes on any field or object in Salesforce and Einstein Bots, AI-powered chatbots that automate customer service tasks.

- In November, Salesforce announced myTrailhead, extending its Trailhead online training platform for internal use by companies seeking to create, manage, and track interactive online learning. Other recent Trailhead announcements include the skills graph and vanity URL features that let users use their Trailhead profiles as a digital resume.

- Also in November, Salesforce announced enhancements to its acquired Quip collaboration platform including the ability to extend Quip with embedded live applications such as calendars and polls.

As Salesforce builds out its next-generation platform, it has recognized that the migration to Lightning is a critical step for customers looking to make the most of their Salesforce investment. However, for those that invested in significant custom development on previous versions of the platform, the move to Lightning can be intimidating. To that end, the company has invested in a number of tools – such as an automated Lightning readiness evaluator and automated conversion tools for converting custom objects such as JavaScript buttons – and Nucleus expects that the company will announce a more complete set of Lightning migration aids in the

coming months. At the same time, Salesforce is expected to more officially release Salesforce Optimizer, which will help system admins and developers better understand their Salesforce footprint, performance issues, and data limits, so customers can more effectively manage and budget for data and storage usage.

SATUIT

Satuit Technologies offers both cloud-based and on-premise CRM solutions for specialized financial services clients including private equity and hedge fund managers, wealth managers, institutional asset managers, and funds distribution. The solution provides core CRM capabilities as well as specialized tools to manage the compliance and legal requirements of the financial services industry. Satuit moved to the Leader quadrant in this Matrix largely because of its release of a new user-configurable interface in March of this year.

In December the company released its Autumn '17 release with new functionality to simplify archiving contacts and to allow users to re-use picklist fields on multiple forms, to drive consistence and integrity in data. The release also included updates to the system toolkit and new enhancements for the SatuitCRM Investor Portal administrator to streamline portal management. The company maintains a strong position as an expert in the Matrix despite its relative size because it provides both core CRM features and very specific functionality and capabilities for its key markets.

FACILITATORS

Facilitators in the Matrix include Acumatica, Infusionsoft, Hubspot, IQVIA, SAP Hybris Cloud for Customer, and Sugar CRM.

ACUMATICA

Acumatica is the only primarily ERP provider covered in the Matrix because, while others provide some CRM functionality, Nucleus has found that Acumatica customers can rely solely on Acumatica for their CRM needs. Acumatica solutions support SMB customers primarily in the retail, wholesale distribution, service, manufacturing, construction, and technology industries. Acumatica supplies modules for sales automation, marketing automation, service and support automation, and customer self service as well as e-commerce through its Magento partnership.

Acumatica 2018 R1, released in March, included additional CRM enhancements such as improved opportunity-to-sales order, expanded Salesforce sync, opportunity quote tracking, and pivot-ready reporting.

Additionally, Acumatica Outlook integration searches for existing leads, contacts, and employees in CRM, enabling 1-click access to an existing contact. Users can also create new leads and contacts right from their inbox; create opportunities and cases associated with existing contacts; and log activity and attach e-mail contents to CRM. New capabilities in Acumatica 2017 R2 included a new user interface (UI); new business intelligence and reporting capabilities; and enhancements to marketing automation including improvements to lists and list building capabilities, dynamic and static marketing list support, and the ability to create activities associated with campaigns (Nucleus Research *S37 – Acumatica looks to continue 2017 momentum*, February 2018).

HUBSPOT

HubSpot provides cloud-based sales and marketing automation for SMBs. Led by its marketing automation capabilities, the company provides its sales force automation (SFA) capabilities for free. In February HubSpot announced a strategic partnership with Google Cloud to support its international cloud capabilities and further investment in its Google Cloud product integrations. The company has made no other significant product announcements since the last publication of the Matrix.

Although HubSpot has gained traffic with its marketing automation capabilities with the SMB audience, Nucleus found that its solution is still firmly an SMB product, because as customers scale and begin to require more advanced marketing automation functionality, they outgrow the capabilities of the solution, with 40 percent of customers expecting to leave within the next two years (Nucleus Research *R174 – HubSpot customer satisfaction*, October 2017).

INFUSIONSOFT

Infusionsoft has stayed true to its core business as a provider of highly-usable integrated CRM, payment processing, and commerce capabilities for small businesses. Since the last Matrix, Infusionsoft made two major announcements:

- In January, Infusionsoft announced the launch of Partner Edition, a client and campaign management tool designed to help Infusionsoft Partners streamline the support of small business clients.

- In October, Infusionsoft announced new Landing Pages capabilities to enable users to publish mobile-responsive pages using a drag-and-drop builder and predesigned templates.

Despite the ongoing entry of many point CRM players (often starting with SFA) focused on the SMB market, Infusionsoft continues to gain momentum both

because of its strong network of consulting and implementation partners and its ability to provide small business owners with one integrated application for all their key customer interaction functions from marketing and nurturing to sales transactions to service and support.

IQVIA

On December 12, IQVIA announced the availability of its Orchestrated Customer Engagement platform (OCE) which IQVIA describes as a new category of technology allowing businesses to leverage an "orchestrated commercial model" across all of its customer-facing functions. This announcement was the first product announcement from the new combined IMS Health–Quintiles company renamed IQVIA, but the company has been working on its new platform approach for some time, with an initial white paper appearing on what it called "Orchestrated Customer Engagement" in October 2015 (Nucleus Research *S14 – The IQVIA approach to orchestration*, January 2018).

IQVIA's "platform of platforms" strategy weds the company's extensive subject matter expertise, industry-standard platforms such as Salesforce, partnerships with a number of best-of-breed component and technology vendors (MuleSoft and Box partnerships were announced in March 2018), and differentiating technologies such as AI-based recommendations to provide life sciences clients with a complete solution. In our initial review, Nucleus found IQVIA's investment in user-centric orchestration and modern UI to be very promising from a usability perspective. As IQVIA delivers more functionality through its platform (the capabilities of partners are not included in the functionality assessment here), it will likely advance in its functionality positioning.

SAP HYBRIS CLOUD FOR CUSTOMER

SAP Hybris Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, and Revenue Cloud comprise SAP's modern cloud CRM capabilities. SAP continues to sell its SAP Hybris Sales and Marketing Clouds primarily to the existing SAP ERP client base. SAP S/4HANA integration and SAP Leonardo capabilities for SAP Hybris are major selling points. Key SAP Hybris announcements from the vendor since the last Matrix include:

- In January, SAP announced its intent to acquire Callidus Software, bringing cloud sales performance management and configure-price-quote capabilities into the SAP Hybris portfolio.

- In October, SAP announced integration and enhancement of facial recognition, machine learning (ML), and Internet of Things (IoT) capabilities to drive more targeted and personalized marketing campaigns and e-commerce experiences.

SUGARCRM

SugarCRM continues to expand its market presence by providing a highly-usable core CRM application with functionality for sales, service, marketing, and support at a very competitive price point. Recent investments in its AI capabilities, enhanced user interface (with the Winter '18 release), and enhancements to its mobile software development kit (SDK) capabilities cement its position as a facilitator in the Matrix. Sugar continues to invest in BPM capabilities and edge functionality such as CPQ to deliver organic functionality advances while relying on partners for other edge areas such as marketing automation. The company continues to make user interface improvements and will soon release its product catalog Dashlet (an extension of CPQ) that can be embedded in any sales or service deployment where users need access to CPQ-level product information.

This spring Sugar shipped its Data Privacy Module, designed to help companies more effectively manage to GDPR requirements, with a new role of Data Privacy Manager who can use the functionality to manage all privacy requests within CRM, including the ability to tag fields and personal data and ensure erasure as needed. The module provides functionality for data subject rights, consent, and opt-in and opt-out at a high level of granularity to support different engagement models.

Sugar began releasing quarterly updates in the Fall of 2017 to be more aligned with the pace of the market; however, ongoing enhancements in areas such as the SDK are made on a rolling basis.

The Sugar On Demand Fall '17 release enhancements were focused on data sharing and collaboration, with shareable dashboards, drill-through charts, and a new e-mail module.

CORE PROVIDERS

Core providers in the Matrix include CRM Next, Maximizer Software, Sage CRM, Veeva Systems, and Zoho.

CRMNEXT

CRMNEXT offers CRM software primarily for the banking and financial services, insurance, retail, media, pharmaceuticals, and automobile industries, providing

sales, service, marketing, social, and e-commerce capabilities. The company hasn't made any significant product releases or announcements since the last Matrix.

MAXIMIZER SOFTWARE

Maximizer Software provides functionality for sales, service, and marketing with industry-specific editions for the financial services, manufacturing, and insurance industries. The latest release of Maximizer released in October 2017 included an update to the user interface, new integration and data management tools, and a new partner portal. As a core provider, it offers core CRM capabilities with the benefit of industry-specific versions that reduce the need for customization at a competitive price point. However, it has not kept pace with the market in key areas such as AI and no-code or low-code frameworks.

SAGE CRM

Sage CRM products are designed to support sales, marketing, and service functions integrated with Sage's accounting solutions including Sage 100c, Sage 200c, and Sage 300c. Sage's CRM solutions include Sage One, Sage Live, Sage Intacct, and Sage X3. The CRM solutions provide cost-effective out-of-the box functionality for Sage ERP customers in the midmarket that need core CRM features. Sage has not kept pace with the market in new features such a low-code frameworks, embedded intelligence, and AI; however, its out-of-the box core capabilities make it a strong solution for midmarket Sage account customers that are seeking core CRM features.

VEEVA SYSTEMS

Veeva Systems is one of the few vendors in the Matrix that is specifically focused on one vertical: life sciences. What was founded as a Salesforce partner on the Salesforce platform has grown into a solution that is broader than CRM, providing capabilities for clinical trial data management, content management, master data management, and other industry-specific capabilities critical to the industry. Beyond the core, Veeva products include Veeva CRM MyInsights for real-time data visualization and Veeva CRM Engage Meeting and Webinar. Veeva delivers a new version of its product every four months, in line with other cloud C RM vendor release cycles.

Veeva falls out of the Leaders quadrant in this Matrix largely because it has yet to move to Salesforce Lightning. This is a significant rearchitecting effort that will enable its customers to take advantage of the Lightning UI and developer frameworks as well as Einstein and other recent functionality additions to Salesforce that are only available for Lightning users. Nucleus expects Veeva to release its Lightning-based application later this year.

ZOHO

Zoho continues to compete strongly in the SMB market with cost-effective cloud-based solutions for sales and marketing, e-mail and collaboration, business process management, finance, IT and help desk, and human resources. Since the last publication of the Matrix, Zoho has made a number of CRM-related announcements impacting its position including:

- In March, Zoho announced a major update to its low-code application building platform, Creator, and introduced the ability to design and develop native custom mobile applications alongside Web applications.

- In February, Zoho announced Zia Voice, which adds speech recognition and chat capabilities to Zia, Zoho's AI-driven sales assistant. Zia can analyze interaction patterns and predict the disposition of leads, analyze e-mails with sentiment analysis to help sales people understand context and prioritize communications and give them alerts for the best time to contact prospects.

- In January, Zoho announced Zoho Flow, and drag-and-drop integration platforms to enable users to build flexible workflows between Zoho applications in the cloud.

Zoho continues to advance on the low-code and no-code fronts which are important aspects for both its customers and developer ecosystem. However, with usability being highly critical to adoption, users find the need for modernization of the Zoho CRM UI a stumbling block in attracting and onboarding new users.

EXPERTS

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

NEXJ

NexJ positions itself as 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. Although the company has not made any significant announcements or product releases since the previous Matrix, Nucleus has spoken to customers that have successful moved from Oracle Siebel to NexJ, enabling them to take advantage of more modern CRM from a usability and functionality perspective while reducing ongoing CRM solution support costs. While NexJ does not have the resources of larger organizations, its investments in AI and other edge technologies help it maintain its position as an expert in the Matrix.

ORACLE SIEBEL CRM

Oracle Siebel CRM provides functionality for sales, service, marketing, loyalty, commerce, customer master, and social automation. With nearly 3 decades in the market, Siebel CRM also has the most breadth and depth of industry functionality, with specific versions for financial services – banking and insurance, communications, media, utilities, high technology, public sector, airlines, retail, life sciences, consumer goods and hospitality.

Key areas of investment for Siebel CRM include process automation, AI, data visualization, and enhanced analytics. Although Oracle CX Cloud is Oracle's lead go-to-market product for CRM, it continues to invest in new capabilities for Siebel CRM customers focused on improving usability and enhancing functionality, and there is no plan to retire the Siebel CRM product line. The Siebel Innovation Pack 2017 moved Siebel more toward a cloud programming model with browser-based tools.

PEGASYSTEMS

Pegasystems continues to differentiate its industry-specific CRM capabilities across marketing, sales, and customer service based on its investments in AI and robotic automation. Pega falls to the Experts quadrant in this Matrix because while it continues to add functional capabilities it has fallen behind the market in making advances in usability. Since the last Matrix Pega has made a number of announcements including:

- In March, Pega announced Sales Coach, which uses AI to evaluate a seller's performance by analyzing the actions taken by a sales person each day and deliver both manager alerts and sales coaching to the rep. Sales Coach also provides managers with dashboards to track team performance and progress against coaching plans. Pega also announced Pega Knowledge, to deliver content and context to sales teams based on particularly deals, and AI-based lead ranking to help sales teams prioritize lead qualification and followup.

- In February, Pega announced a partnership with Idio, a demand orchestration platform for business-to-business marketing, to enable more content and event-driven account-based marketing for business-to-business users.

- In January, Pega announced the extension for free access to its online training through Pega Academy, to enable both customers and partners to enhance their Pega development and implementation skills.

- In December, Pega announced the launch of Pega Deployment Manager, a no-code, model-driven set of tools to support more agile development and deployment of new Pega capabilities.

- In October, Pega also announced new capabilities for customer service including expanded AI and virtual assistant enhancements and robotic accelerators for Customer Service, to further automate and guide agent activities and increase productivity.

Amid the functional announcements, Nucleus sees the training extension and Pega Deployment Manager announcements as key steps that Pega is taking to increase both internal customer and developer skill while lowering the barriers to entry for implementing Pega.

SAP

SAP CRM provides on-premise CRM functionality primarily for SAP ERP customers, with capabilities for sales, service, marketing, partner and channel management, case management, loyalty management, and trade promotion management. SAP is currently working to modernize SAP CRM with S4/HANA, as support for SAP CRM is scheduled to expire in 2025. Nucleus finds that most SAP customers, however, are considering cloud CRM and SAP Hybris instead of a move to SAP CRM on premise, and that is unlikely to change.

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