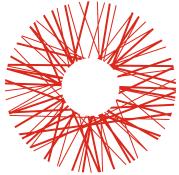




VALUE MATRIX

PROGRAM: CUSTOMER RELATIONSHIP MANAGEMENT

DOCUMENT NUMBER: U46 APRIL 2020



NUCLEUS
RESEARCH

2020 CRM TECHNOLOGY VALUE MATRIX

ANALYST

Daniel Elman, Nick Grizzell

THE BOTTOM LINE

As one of the most mature business application spaces, CRM vendors are constantly trying to stand out from the crowd to better help their customers deliver satisfying and personalized experiences that build loyalty and drive revenue. This year, the move to create a unified customer experience (CX) gained momentum with smaller and mid-sized vendors taking steps to integrate marketing and customer service functionality with traditional sales automation and salesforce management tools, whether through homegrown development or strategic partnerships. Artificial intelligence in CRM took another leap forward with natural language search (both with text and voice) and improvements to explainability being key developments for market leaders. Hyperpersonalization, automation, and the ability to connect with customers across all devices and channels are other key themes.



OVERVIEW

As CRM vendors continue to innovate and look to differentiate from their competition, creating and delivering the correct experience to each customer at the optimal time is critical. More and more vendors are moving away from siloed CRM model and integrating customer and field service with marketing and sales so that the full gamut of customer interactions can be recorded in the same system and can be understood holistically to

improve the entire customer life cycle. For the scope of this Matrix, CRM is defined as a solution for managing, organizing, and analyzing a sales organization's interactions with customers and prospects. Although the distinction seems slight, we define CX as a solution for managing, organizing, and analyzing a company's interactions with customers and prospects, which encompasses customer service, field service, marketing, and support, along with sales.

In order to create and deliver these experiences for customers, brands need to be able to interact with customers via the proper contextual channel. If an aggrieved customer reaches out via social media, the ability to quickly become educated with a 360-degree view of the customer, their preferences, and past purchases and interactions with the company and then seamlessly interact with the customer via the same social media channel to solve the problem and restore customer satisfaction. The ability to gather as much relevant information as possible about customers to create experiences that are fine-tuned to each unique profile and quickly connect over the proper channel has become just as important as traditional information management and database navigation for leading CRM vendors.

Additionally, AI has been further integrated to the applications; natural language search, where the user can query the system with conversational language (via text and, in cutting-edge cases, voice) has advanced to provide a true value-add for customers, helping to increase data analysis adoption and to decrease time spent manually searching records. Further smart capabilities include coaching by digital assistants that can analyze sales patterns to uncover the most successful approaches, improved forecasting with the factors contributing to the prediction explained, and recommended auto-generated visualizations and dashboards that best reflect specific data. These features help accelerate analytics adoption, especially for users who aren't formally trained in statistics or coding.

Automation and repeatability enhancements are another key trend. Many of the most innovative vendors offer tools for creating and automating workflows, with action-based triggers, conditional formatting, and integration with business areas to complete a process end-to-end. With the new ability to gather and analyze greater volumes of data more easily, customers can uncover the most effective sales strategies, pricing models, and outreach tactics. Using these insights, customers can optimize their own processes and create repeatable, data-backed templates and workflows that reduce the time spent onboarding and eliminate guesswork for sales teams, driving higher sales.

THE LEADERS

Leaders in this Value Matrix include Creatio, Infor, Microsoft, Oracle, and Salesforce.

CREATIO

At the end of 2019, bpm'online announced that it has formally rebranded itself as Creatio. The name change reflects the emphasis on creating custom workflows and applications with the process builder functionality. It extends traditional business process management and allows users to configure fully automated flows that trigger actions within the CRM solution such as updating a record, sending marketing material, or opening a service ticket. It offers modules for all core CRM areas: sales, service, and marketing; the Studio module enables users to build custom apps, processes, and workflows in a low-code environment. It also offers professional services through its partner network to help with best practices, implementation, and configuration of systems. Creatio can scale to serve enterprise level organizations with thousands of users and locations around the world.

It is positioned in the Leaders' quadrant of this year's Value Matrix. Creatio is clearly aligned with the market momentum toward integrated sales, service, and marketing to deliver improved customer experiences. Additionally, it offers intelligence throughout the platform and all functionality is thoroughly extended with the process building capabilities, allowing Creatio to be configured for virtually any use case.

INFOR

Infor offers an end-to-end suite for business with the Infor CloudSuite; it includes applications for ERP, CRM, business intelligence, HCM, CPQ, enterprise asset management (EAM), and others. All the cloud solutions are built on the Infor OS platform; further this provides integration possibilities with Infor Coleman, Infor's platform-wide AI capabilities, and Infor Birst for data analytics, visualizations, and dashboards that are embedded within the CRM solution.

In Spring 2020, Infor was made fully private by majority-stake holders, Koch Industries. This presents a significant opportunity for Infor to be implemented across the Koch Industries portfolio and customer network, expanding Infor's reach substantially. Also, as a company known for reinvesting substantial profits back into the business, Koch Industries clearly uses value as the primary metric for evaluating investments; providing immediate access to significant capabilities and resources to position Infor for even greater success and allows Infor to take a long-term approach, focused on developing industry-specific solutions that help customers modernize and drive immediate, tangible impact.

CloudSuite CRM is focused around capturing all touchpoints with customers across marketing, sales, and service in order to better understand customers and more accurately forecast future business. It includes all core CRM functionality for lead, opportunity, and activity management. The ease of accessing and analyzing data is better than most; with the Infor Birst integration it's like having an enterprise-level BI tool available for use within CRM. Integration with other Infor cloud solutions is another key value driver; many customers migrate to CloudSuite CRM after implementing another Infor product like ERP; the integration allows for a more complete view of business health and operations, and they notice it can support all the CRM functionality needed at a more approachable price than many other enterprise-caliber solutions, enabling lower overall CRM TCO.

For the rapid growth and strong functional completeness, Infor is moved to the Leaders' quadrant of this year's Value Matrix. If this trajectory of growth and innovation continues, we could see some high-profile global enterprise customers jump ship from some more mature competing offerings.

MICROSOFT

Microsoft continues to maintain its position as a leader in the CRM Value Matrix and strengthen its capabilities in the future through consistent investments in the Dynamics 365 platform. Microsoft enters 2020 with a focus on innovations for the Azure platform in areas such as ML as well as Power Platform of Power BI, Power Automate, Power Virtual Agents, and Power Apps.

In October 2019, Microsoft announced the second wave of release plans and updates for the Dynamics 365 platform covering October 2019 to March 2020. The wave of updates and releases began with a new business process application, Dynamics 365 Commerce. Using the Dynamics 365 Retail capabilities as a base, the new commerce application adds native e-commerce functionality to the Dynamics 365 platform and aims to provide a complete omnichannel solution from the office to the retailer. In December 2019, Microsoft announced Dynamics 365 Human Resources for the collection of employee experiences to optimize workforce costs. Throughout the second release wave, Microsoft focused heavily on improving AI capabilities across solutions with enhancements in areas such as Sales Insights, Customer Service Insights, Customer Insights, Market Insights, and Fraud Protection. Most of the updates centered around improving team experiences by unifying customer data, sales lifecycles, and market knowledge for a complete view of the market space. Additionally, Microsoft emphasized Power BI updates with improvements and additions such as intuitive experiences, a unified BI platform, big data analytics, and pervasive AI.

For 2020, Microsoft plans to continue to provide updates and additions to Dynamics 365 and Power Platform. Microsoft announced a “2020 release wave 1” covering these key areas from April to September of this year:

- Dynamics 365 Sales continues to have a focus on user experience and seller productivity for updates. As part of the industry shift towards digital selling, Microsoft brought enterprise-grade Forecasting Capabilities to General Availability and released its Sales Accelerator solution to Public Preview. Furthermore, Dynamics 365 Sales Insights will see updates to auto data capture with advance AI match and merge capabilities, conversation intelligence, and in-depth conversation analysis and emotion detection.
- Dynamics 365 Customer Service enables end-to-end service for customer support and customer engagement. The platform will see an expansion of agent productivity tooling to help companies create predictive service models.
- Dynamics 365 Customer Service Insights aims to provide users with a complete view of trends, operational data, and performance metrics using AI. With new AI capabilities, including integration with Power Virtual Agents, the platform allows users to make informed decisions on customer insights.
- Dynamics 365 Fraud Protection is centralized around payment fraud protection and aims to help merchants lower fraud losses, increase bank acceptance rates, and improve customer experiences. Microsoft has added Loss Prevention to the platform to help retail stores reduce fraud by lowering shrinkage losses and improving store efficiencies. Also new is Account Protection which helps boost online revenue by decreasing account fraud costs, protects business reputation, and improves customer experience and satisfaction.
- Dynamics 365 Customers Insights gives organizations the ability to view transactional, observational, or behavioral sources for customer data. The solution strengthens data profiling and data segmentation functionalities to help companies understand customer data. In turn, companies can make informed decisions using customer insights to improve business processes. Customer Insights can also integrate with Dynamics 365 FormsPro, an enterprise-grade customer feedback management solution, to incorporate customer feedback into a unified customer profile.

In the 2020 release wave 1, Microsoft also plans to add industry accelerators to industries such as Nonprofit, Financial Services, Health, and Automotive. The accelerators will aim to enable organizations to develop quick solutions based on data within each specific sector to improve customer experiences and drive business processes. The consistent improvements and updates across the Microsoft Dynamics 365 prove Microsoft’s dedication to driving

profits for organizations and enhancing customer experiences. Microsoft Dynamics 365 remains a Leader in this year's Value Matrix.

ORACLE

Oracle has continued to invest in its differentiated, data-first vision for CX throughout 2019. The look and feel have been refreshed across the entire platform with the Redwood UI. With Oracle CX, data is centralized (performance is optimized for the Oracle Autonomous Database) and enriched with third-party data like that from Oracle Data Cloud and DataFox which Oracle acquired in 2018. With the newly released Customer Intelligence Platform called Oracle CX Unity, customers can leverage intelligence to uncover insights about their customers during the customer lifecycle journey, allowing them to deliver more personalized experiences that build long-term brand loyalty and drive revenue. Oracle has curated a wealth of behavioral data on customers (like time spent on pages, number of times products were viewed before purchase, and more) to supplement demographic and transactional data that traditionally reside in CRM systems. This enables a differentiated level of customer understanding; as analytics become even more important to driving business on a global scale, companies with access to the greatest quantity of high-quality data will excel. With decades of expertise managing data and optimizing the search and analysis within the Oracle Database, the entire CX Cloud benefits from this expertise.

On a unified cloud platform, Oracle offers solutions for CX, BI and analytics, enterprise resource planning (ERP), supply chain management (SCM) and logistics, human resources applications, and many others. With the Oracle Database and Oracle Cloud Infrastructure (OCI) underpinning these technologies, customers can unify data and create sophisticated integrated processes that flow between multiple areas of business using common backend services. With sufficient investment and experience, Oracle systems can be configured to fit any enterprise use case and can expand to any scale.

The Redwood UI update, first implemented in Oracle CX Digital Sales, includes automated templates and workflows to reduce clicks, smart shortcuts that quickly take reps to the tasks they use the most, and digital assistant functionality to surface relevant insights to the user in-context from the underlying analytics engine. This includes updates, reminders, and recommendations to ensure reps stay on task with the actions that will lead to sales.

Another key theme across the CRM space through 2019 was hyper-responsiveness. Companies must anticipate the wants and needs of customers before they're asked for, and if they can't predict them, they need the ability to respond immediately to a customer request. Oracle CX's Responsive Selling blends Sales, CPQ, Commerce, and Subscriptions to directly address this pressing concern. For example, quoting has always been one bottleneck in the process because it can't be anticipated and is highly customized, especially for complex sales with multiple possible configurations and dependencies. Oracle

CX released the ability to build quotes and share proposals without leaving the Oracle CX interface.

In early 2020, Oracle closed its acquisition of CrowdTwist, a leading cloud loyalty solution to enhance its customer retention capabilities. CrowdTwist is integrated in Oracle CX Marketing and enables organizations to deliver personalized engagement and extend loyalty and reward programs to a brand's most beneficial customer behaviors. CrowdTwist already has integrations with Oracle Responsys, Eloqua, CX Commerce, Micros, Bronto, and NetSuite.

Oracle is positioned the Leaders' quadrant of this year's Value Matrix. It offers enterprise-scale performance and flexibility across verticals and use cases. Oracle has expressed strong interest in expanding its presence in business applications which bodes well for future product investment. It is already one of the most mature on the market with a strong roadmap that is toward the leading-edge of CRM innovation.

SALESFORCE

Salesforce has been a longtime leader and innovator in the CRM space. Currently its portfolio includes thousands of applications that span sales, service, marketing, analytics, logistics planning, field service management, quoting, and more. By creating a unified cloud platform, Salesforce customers can integrate various Salesforce applications to break down data silos and enable more holistic visibility to a company's operations.

One of the keys to Salesforce's success is the strong usability of the solutions; the user interface is intuitive and doesn't take long to learn. At an organizational level, administrators and developers are plentiful, and can be trained and certified in-house with the Trailheads online learning platform. This free service has exponentially grown the number of qualified Salesforce administrators and developers available which drives consistent, growing demand for Salesforce products in the workforce.

For the last few update cycles, Salesforce has been building out intelligent capabilities from Einstein for Sales Cloud. It has matured to encompass each step of the sales process from lead scoring to opportunity scoring, recommended dashboards and graphics to best represent sales data, and predictive forecasting. Intelligence in the business application context can be broken into two levels, that which improves rep productivity like automation and recommendations, and that which improves rep efficacy like lead and opportunity scoring, insights from email, and more accurate forecasting. With this year's progress, Salesforce has moved past the first-level productivity boosters to release real intelligence capabilities that help reps prioritize the best accounts and engage more effectively with those accounts.

High Velocity Sales was another key announcement from last year. It has been updated quickly since its release; recent updates to the cadence builder allow for conditional branches and email to be automatically sent if configurable trigger conditions are met. It also includes an updated chat bot that can engage with prospects and automatically assign the lead to a sales rep. A work queue and activity timeline help reps to schedule their time and see what tasks are assigned and due. A new analytics dashboard with a natural language interface allows users to query data in conversational language for insights.

At Dreamforce in November, Salesforce announced Einstein Voice Skills to enable users to create custom voice applications for any role or industry. It also announced that Service Cloud Voice integrates telephony into a unified agent console, enabling Einstein to offer recommendations and next best actions in real-time to improve service experiences.

Salesforce was one of the earliest to release dedicated verticalized cloud solutions for industries with specific requirements like healthcare and financial services. Beyond industry-specific clouds, Salesforce has also packaged together pre-built templates and capabilities for verticals including insurance, manufacturing, communications and media, government, travel and hospitality, and nonprofit management. As more businesses look to digitize, having pre-built components that fit the customers' business model and use case accelerate time to value and improves adoption. Salesforce is in a unique position to leverage its expertise and technology as a leading enterprise CRM to rapidly create additional specific modules and integrations for industry verticals. This capability will be accelerated and strengthened by Salesforce's acquisition of vertical applications provider Vlocity.

Salesforce is successfully executing on strategies for all key areas within CRM and positioned accordingly in the Leaders' quadrant.

THE EXPERTS

Experts in the Value Matrix include NexJ, Oracle Siebel CRM, Pegasystems, and SAP C/4HANA.

NEXJ

NexJ is a customer process management-focused CRM solution for the financial services and insurance industries. It offers client onboarding, Know Your Customer (KYC), and customer data and analytics solutions. By focusing on the financial sector, NexJ has tailored its CRM solution to financial protocols to differentiate the solution from traditional CRM tools. NexJ customers carry highly sensitive information and must follow strict laws and regulations that govern the handling of data management and security. With these

parameters and regulations in mind, NexJ has created a CRM solution with heightened security measures.

In June 2019, NexJ announced a partnership with Boosted.ai to strengthen Machine Learning capabilities. The supplement to AI and Machine Learning capabilities aimed to deliver wealth management functionalities to advisors and client services while improving the productivity of back-office tasks. The partnership came after the launch of NexJ's Strategic Partnership Program that looks to work closely with financial services-specific solutions to create value by broadening product offerings. In September 2019, the company announced the integration of an intelligent investment recommendation assistant. The new AI assistant continuously monitors portfolio data to provide individualized investment options to firms. In October 2019, NexJ announced support of its CRM solution for deployments within a private cloud, hybrid cloud, or on-premise, giving users the freedom to access NexJ CRM for wealth management across diverse environments.

With continued updates to the CRM solution and partnership to strengthen its capabilities, NexJ has demonstrated a significant investment in improving the functionality of its solution, particularly for data management and advanced analytics areas. For this reason, despite its smaller size and fewer resources relative to competitors, Nucleus positions NexJ as an Expert in this year's Value Matrix.

ORACLE SIEBEL CRM

Oracle Siebel CRM provides solutions for sales, marketing, client services, loyalty, commerce, master data management (MDM), event management, product and catalog management, and social automation. Oracle Siebel CRM is one of the pioneering platforms in the CRM market space with years of experience facing changes to technology, user preferences, and cloud infrastructures. Siebel covers a wide range of functionalities relating to industry-specific features and data models. Nucleus has found that many organizations continue to maintain investments in Oracle Siebel simply because of the breadth of capabilities and data model complexities supported by the platform. Oracle continues to lead its CRM sales with Oracle CX Cloud, but with the amount of Oracle Siebel customers, the company still invests in necessary product updates.

Throughout 2019, we saw multiple Oracle Siebel updates through the 19.x product versions, which included early adoption features, improvements to repository delivery framework, developer experience features, Siebel CRM on Docker, and OpenUI. As of March 2020, Siebel CRM rolled out the 20.3 updates under the "Continuous Delivery Model," providing Oracle Siebel users with new features and innovations frequently. Siebel 20.3 brought new features such as auto tile visualization and database options in migration applications. Oracle Siebel continues to deliver innovations and provide value to customers

through autonomous CRM and business agility. Oracle Siebel remains an Expert in this year's Value Matrix.

PEGASYSTEMS

Pegasystems provides AI-powered solutions for CRM built on the Pega Platform. Its CRM offerings cover sales, marketing, and customer service, and it has developed several verticalized solutions. One key area Pega looks to differentiate itself is with the use, management, and analysis of data through the Pega Customer Decision Hub which allows customers to leverage historical data to predict customer activities and identify next-best-actions. Further, Pega has invested significantly to become an industry-leader in robotic process automation; Pega users commonly cite the ability to create complex automated workflows that encompass different business areas such as marketing lead handoffs to sales.

More companies than ever are looking to automate processes to eliminate human error and boost user efficiency; while the setup and implementation of these edge technologies like AI can be complex and difficult for smaller or underresourced firms to support, for companies ranging from mid-market to enterprise, Pega can deliver transformative change and business modernization. For this reason, it is positioned in the Expert quadrant of this year's Value Matrix. With continued growth, particularly among enterprise customers, and continued focus on usability enhancements, we expect Pega to join the Leaders in short order.

SAP C/4HANA

The SAP C/4HANA suite includes SAP Marketing Cloud, SAP Commerce Cloud, SAP Service Cloud, SAP Customer Data Cloud, and SAP Sales Cloud, and the CallidusCloud portfolio. The native integration with SAP S/4HANA ERP suite allows customers to centralize customer and financial data to obtain a complete view of the organization. Using SAP Leonardo, the company leverages AI, and ML functionalities to improve the overall user experience and capabilities of the platform. In April 2019, SAP announced the Customer Identity and Access Management (SAP CIAM) solutions for business-to-business (B2B) use to secure communications between customers and partners. These are some of the first SaaS functionalities for B2B use that offer a secure identity with authorization protocols, which allow third parties to access first-party data and protect customers from security and legal risks. In September 2019, SAP announced continued efforts towards its SAP Integrated Delivery Framework. The framework assists customers in the move to SAP S/4HANA on partner-led projects by coordinating data between SAP and its service partners. SAP wants to ensure the same experience for all customers whether you choose to employ SAP S/4HANA directly or through an SAP service partner.

SAP recent updates and improvements to the overall user experience through increased security and streamlined integrations will generate not only more customers but also a more stable customer base. With the integration of SAP S/4HANA and SAP C/4HANA, SAP is positioned as an all-in-one solution for enterprise-level organizations, and is configurable to virtually any use case, regardless of complexity. SAP is positioned as an Expert in this year's Value Matrix.

THE FACILITATORS

Facilitators in the Value Matrix include Acumatica, Keap, SugarCRM, and Zoho.

ACUMATICA

Acumatica continues to invest in its CRM capabilities with the new 2020 R1 release centered around improving the quality of life and BI functionalities. Although Acumatica is primarily an enterprise resource planning (ERP) vendor, it is covered in the CRM Value Matrix because of its integration and level of features that make it a competitive CRM product. Using the same UI across all modules, Acumatica users gain easy access to ERP and CRM capabilities with less overall training. Furthermore, the platform provides a consolidated view of customer records, where users can see all customer interactions in a single database.

Key Acumatica 2020 release notes include:

- Improvements to AI/ML capabilities. On top of allowing users to automate data entry and other manual processes, AI/ML now enables users to use a mobile camera to create expense receipts.
- Simplified reporting. Additions such as pivot table percentage calculations and distinct counts will improve the user experience. The addition of dashboard caching improves the overall performance of the dashboard.
- Acumatica Payroll. Reduce overhead expenses with in-house payroll with features such as, among others, integrated taxes and tax forms, deductions and benefits, and timecard integration and overtime rules.
- BigCommerce Integration. The integration of sales and delivery aims to provide omnichannel support for the B2B and B2C business models.
- Integration with Adobe Document Cloud. Acumatica is now integrated with Adobe Sign and will soon utilize APIs from Adobe to give customers access to PDF capabilities.

At Acumatica, the CRM development team works closely with the platform developers to ensure that all platform enhancements are extended to CRM as well. Acumatica CRM includes integration with multiple platforms ranging from marketing, service, and support automation capabilities to full integration with Microsoft Outlook. This year, Acumatica will focus much attention on improving AI and ML capabilities to improve the CRM and ERP experience for all users. Almost half of Acumatica customers deploy the CRM platform, and these customers are growing companies that will thrive in conjunction with Acumatica to drive revenue for the company. Acumatica's innovation and stable development team place it as a Facilitator in the 2020 Value Matrix.

KEAP

Keap offers a diverse CRM platform for marketing automation, e-commerce, payments, and analytics focused on SMB customers. The company aims to centralize business activities and customers' connections to provide a single source of visibility of business operations. With the Infusionsoft company rebranding to Keap Q1 2019, we saw a commitment to small service businesses through the company's smart client management software providing sales automation and marketing automation to small businesses. A year later, that commitment still stands with Keap building and updating solutions for small businesses in the home, personal, and professional service industries. As of February 2020, Keap announced product releases and updates to the platform's mobile services, including management of Keap appointments and text message templates. In March 2020, the company integrated Stripe, which is a payment processing platform, for Keap and Infusionsoft users. The integration aims to improve customers' cash flows and protect against fraud while also improving the quality of life for customers by letting them pay directly on invoices or order forms. With these updates and improvements, Keap Infusionsoft continues to support small business, but as these businesses continue to grow and processes become more complex, these companies may outgrow the Keap solutions; however, the solution is positioned as a Facilitator in the Matrix as a valuable option to centralize and automate business for SMB customers.

SUGARCRM

SugarCRM provides an easy-to-use CRM solution with sales automation, customer support, marketing, and reporting functionalities. The company's simplified solution is a multi-functional tool giving users the ability to analyze data across various divisions such as finance, sales, marketing, and development. Using its Hint relationship intelligence tool to identify relationships and connections within businesses helps the company differentiate itself in an already saturated market space. The tool also assists in the decision-making process by providing actionable data-backed insights to users.

Recent company announcements include:

- In May 2019, the company announced the acquisition of Salesfusion, which is a leading provider of marketing automation solutions. The acquisition not only strengthens the capabilities of the SugarCRM customer experience tools but also solidifies the company's growth in the CRM market.
- In August 2019, the company unveiled Sugar Serve; a new customer support offering focused on the automation of customer support processes. The feature aims to provide agents with everything they need to handle support cases in a single console experience.
- In November 2019, the company announced a partnership with ZINFI, which provides Unified Channel Management (UCM) solutions through-channel marketing automation and partner relationship management (PRM) capabilities. Customers now have access to partner systems of record (PSOR) integration, single sign-on integration, and centralized reporting.
- In April 2020, the company launched Sugar Integrate, a cloud-based integration platform focused on helping companies more easily integrate with business applications and eliminate data silos. The solution reduces the time and cost of integrating Sugar with other business applications while also reducing the dependency on vendors by making real-time integrations interchangeable.

Additionally, in April 2020, Sugar announced feature enhancements in its 10.0 release. New features include:

- Product Catalog, a feature previously viewable by administrators only is now a globally visible tool. Administrators can still restrict access within this feature.
- Module Loader REST API, update 10.0 brings nine new REST API endpoints for uploading, installing, and enabling packages within Module Loader.
- Exporting User Reports, regular users can now export reports within the Users module.
- Dashboard Limit, the maximum number of dashboards allowed under the Home module has now been increased from 20 to 50.

Sugar continues along a path of growth and innovation in 2020 with key acquisitions and changes to improve upon the already well-rounded SugarCRM platform. In 2019, the company lacked robust marketing automation capabilities but has since developed the platform with the acquisition of Salesfusion to strengthen marketing automation and customer experience features. With SugarCRM's functionality and usability making it an approachable deployment for most any organization, the company is positioned as a Facilitator in the 2020 Value Matrix.

ZOHO

Zoho offers its integrated suite of over 45 applications as the web application Zoho One. CRM is the most-used application in the portfolio and one of its most mature modules. Customers can choose which of the applications to activate as their use case demands. The unified data model that Zoho has developed and employs across all components of the platform is key as it enables seamless integration between disparate applications and modules without requiring custom integration. CRM includes all the standard components: information management, lead and opportunity management, and dashboards and insights from Zoho's AI, Zia. Zia is deployed at the platform level operating on the unified database, so its capabilities aren't restricted to any application, rather the recommendations, natural language, translation, speech recognition, and other core AI capabilities are seamlessly integrated with every application. One key productivity driver that was top-of-mind for customers was natural language search, which allows users to search the system conversationally to find customer records, insights, and other data. Zoho maintains its own infrastructure end-to-end, so it can scale as-needed by its customers; it supports customers from single-office small businesses to enterprise level.

Key announcements and updates include:

- At ZohoDay in January, Zoho announced Wizards for Zoho Forms to allow users to design and build custom forms for more streamlined and accurate data collection. The forms can be built with conditional flow where the questions presented depend on a previous answer.
- Also at ZohoDay, Zoho announced Signals; where different customer actions can be configured to trigger a notification to users. For example, users can configure an email campaign to notify when a recipient opens the message or clicks on a link.
- Prediction Builder allows users to build customized prediction scores for leads, deals, opportunities, and other events based on their own business strategy. Being built according to the unique customer business practices improves accuracy over out-of-the-box predictions that are becoming common in the CRM marketplace.

Most deployments are small to mid-market companies, although Zoho does support a growing number of enterprise customers. Zoho is positioned as a Facilitator in this Value Matrix, with strong upwards momentum; with further upmarket growth it is on track to join the Leaders in future Matrices. The rapid progress in building and implementing actionable AI capabilities rivals the Leaders in this Matrix. It offers all core CRM capabilities in an accessible application that can be implemented in hours, while still being configurable to manage the complexity and additional demands of a global enterprise.

THE CORE PROVIDERS

Core providers in the Value Matrix include Hubspot, Maximizer Software, SageCRM, and X2CRM.

HUBSPOT

HubSpot provides cloud-based sales, service, and marketing automation solutions to rapidly growing businesses. Last year, HubSpot began a path towards incorporating enterprise-level activities into its lineup. Recently, HubSpot entered the enterprise scene with additions to the Marketing Hub Enterprise, giving companies from small to enterprise-level access to simplified marketing tools and AI-powered A/B testing. HubSpot includes applications for building and managing the sales pipeline throughout the entire sales lifecycle. Additionally, the platform consists of tools for social media, search engine optimization, Website content management, CRM, and analytics.

In April 2020, HubSpot announced the launch of CMS Hub for streamlined website management. The content management system offers security and scalability to diverse organizations looking to improve the user experience on a website. The solution aims to be simple and easy to use website tools requiring little to no oversight from IT teams or implementation from developers. IT teams also benefit from this solution with robust security controls allowing IT staff to focus on pressing issues instead of credential validation: The solution bolsters and effortless update capability with drag-and-drop features enabling non-technical users to make updates to websites.

HubSpot is positioned as a Core Provider in this year's Value Matrix. It provides a simple and approachable CRM solution for small businesses that encompasses all areas of core functionality.

MAXIMIZER SOFTWARE

Maximizer CRM delivers customer engagement opportunities through a modular approach focusing on industry-specific marketing, sales, and customer service capabilities. With dedicated platforms for financial services and manufacturing as well as support for third-party integrations with Outlook, Intuit Quickbooks, and HubSpot, Maximizer aims to provide a complete and cost-effective CRM solution. Maximizer's release of the 2019 version of the All-In-One CRM solution remains the most recent release, which brings advanced lead management and mobile CRM capabilities to the platform. Maximizer's native mobile Sales app is available on iOS and Android. With a continued focus on advancements in usability and functionality, Maximizer can grow within the CRM marketplace. Maximizer CRM is positioned as a Core Provider in this year's Value Matrix.

SAGE CRM

Sage CRM is a module offered from its more extensive Sage Business Management suite of solutions. Sage offers fully integrated CRM solutions or a modular approach containing sales, marketing, and service solutions. With a host of other solutions in the Sage Business Management suite, many Sage CRM customers are Sage ERP users. Customers choose to remain in the Sage application ecosystem for seamless integration between CRM insights and Sage Business Management solutions. Leveraging code-free development, along with integration with the Salesforce platform, customers can make informed business decisions through advanced analytics. In February 2020, the company announced the latest release for the Sage CRM solution named Sage CRM 2020 R1. This update brings improvements to integrations with third-party platforms and the UI. Sage CRM provides a cost-effective and easy-to-use solution for SMB customers and remains a Core Provider in this year's Value Matrix.

X2CRM

X2CRM is X2Engine's solution providing users with workflow management, marketing automation, and customer reporting. Its three key software components include X2Marketing Automation, X2WorkFlow, and X2Process, enabling automated communication, a visual workflow automation engine, and a process management system. Additionally, the versatile solution allows for deployments within AWS and Google Cloud environments. With more than 20 modules for sales, marketing, and customer service interactions, X2CRM is positioned as a cost-effective and capable solution for driving customer engagement and sales opportunities. Since the release of the previous CRM Value Matrix, there have been no significant updates to the platform. X2CRM remains a Core Provider in this year's Value Matrix.