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Critical Capabilities for Sales Force Automation

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This Gartner Critical Capabilities report evaluates 19 sales force automation vendors against six use cases. Application leaders supporting sales should use our use-case-specific rankings to identify a shortlist for further evaluation.

Overview

Key Findings

Artificial intelligence (AI) for predictive sales forecasting, relationship health scoring or opportunity health scoring is now offered by more than half of the sales force automation (SFA) vendors in this study.

Forecasting capabilities vary widely across the vendors in this research, with some only providing basic pipeline management functions, and others providing complex forecast management with advanced functions like predictive sales forecasting.

Ease of use, particularly for data entry and maintaining data quality, varies considerably. Some vendors have invested in conversational AI to improve data entry, but it is not a common function yet in the industry.

Recommendations

To support sales technology objectives, application leaders should:

Prioritize vendors with advanced opportunity management, forecast management and partner relationship management capabilities if your organization has long-cycle B2B sales processes.

Prioritize vendors with effective activity management, platform and mobile capabilities if your organization has short-cycle B2B sales processes.

Prioritize vendors with strong contact management, mobile and activity management capabilities if your organization has long-cycle B2C sales processes.

Prioritize vendors with advanced activity management, mobile and platform capabilities if your organization has short-cycle B2C sales processes.

Prioritize vendors with partner relationship management and mobile capabilities if your organization has indirect or relationship selling processes.

What You Need to Know

This document summarizes Gartner's research on the functional capabilities and differences among the vendors in the companion "Magic Quadrant for Sales Force Automation." It also contextualizes the capabilities, aligning each vendor's capabilities against the five most-common selling use cases:

B2B long-cycle sales

B2B short-cycle sales

B2C long-cycle sales

B2C short-cycle sales

Indirect/relationship sales

For definitions of these five use cases, see the Use Cases section of this document.

The observations and scores in these profiles are solely the result of Gartner's assessment of vendors' capabilities. However, consistent with Gartner research methodology, we note instances where the vendor's references in the Magic Quadrant reference survey gave the vendor scores above four on a five-point scale.

Analysis

Critical Capabilities Use-Case Graphics

Figure 1. Vendors' Product Scores for Long-Cycle B2B Sales
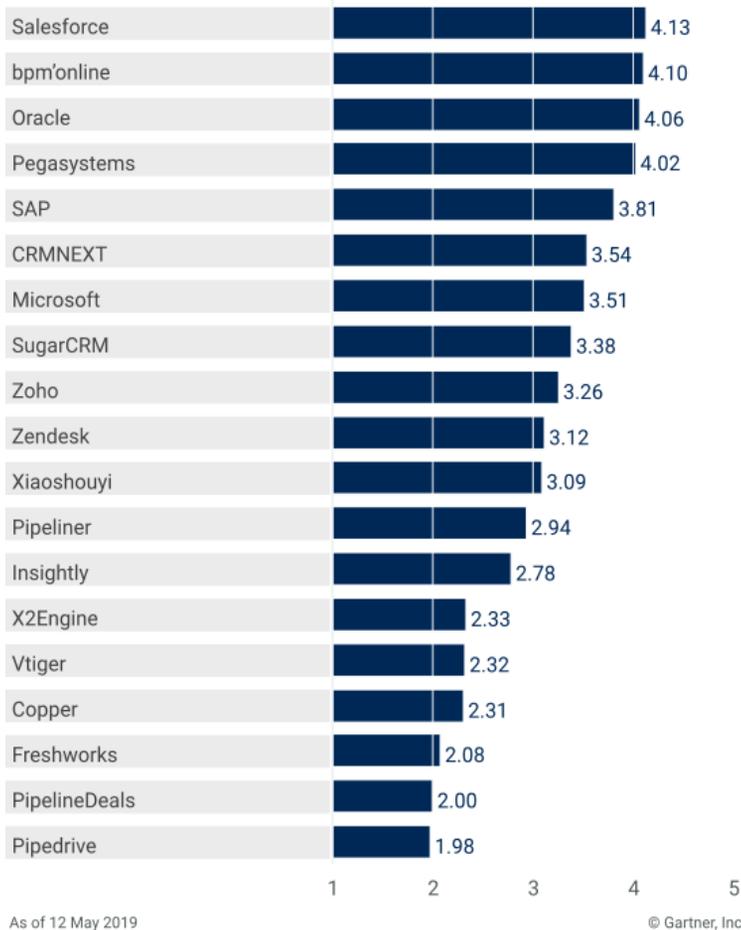
Product or Service Scores for Long-Cycle B2B Sales

Vendor	Score
Salesforce	4.13
bpm'online	4.10
Oracle	4.06
Pegasystems	4.02
SAP	3.81
CRMNEXT	3.54
Microsoft	3.51
SugarCRM	3.38
Zoho	3.26
Zendesk	3.12
Xiaoshouyi	3.09
Pipeliner	2.94
Insightly	2.78
X2Engine	2.33
Vtiger	2.32
Copper	2.31
Freshworks	2.08
PipelineDeals	2.00
Pipedrive	1.98

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Figure 2. Vendors' Product Scores for Short-Cycle B2B Sales

Product or Service Scores for Short-Cycle B2B Sales

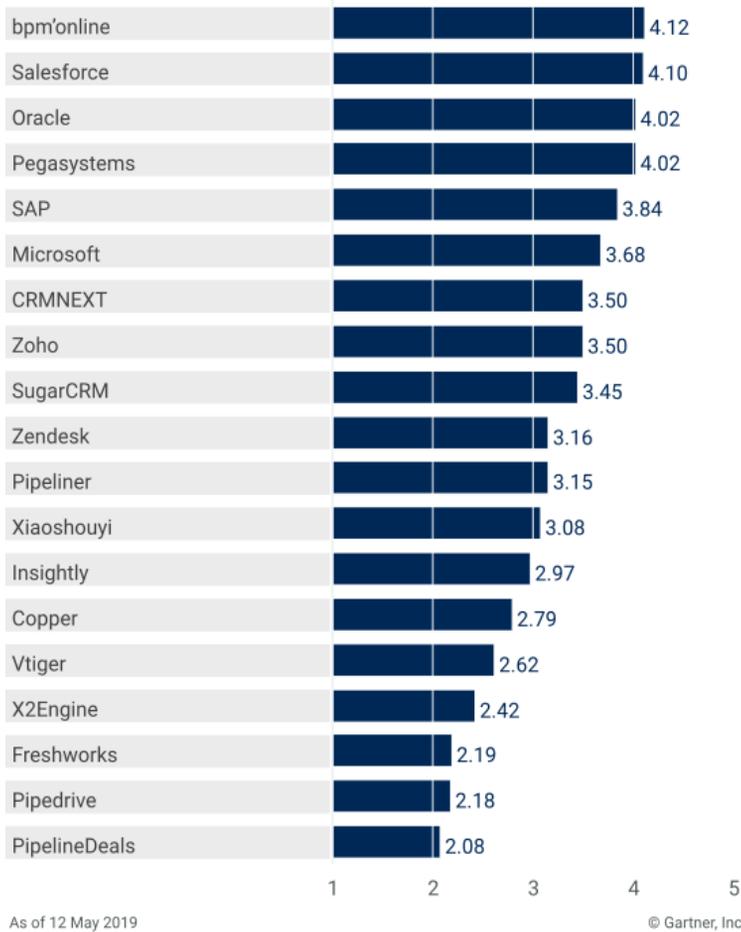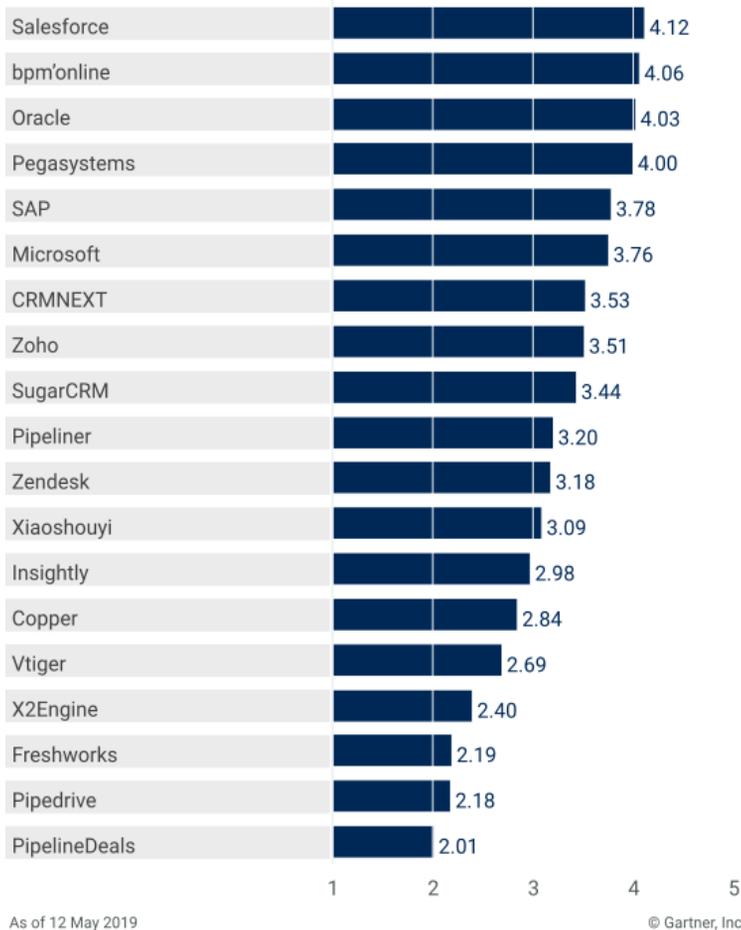| Vendor	Score
bpm'online	4.12
Salesforce	4.10
Oracle	4.02
Pegasystems	4.02
SAP	3.84
Microsoft	3.68
CRMNEXT	3.50
Zoho	3.50
SugarCRM	3.45
Zendesk	3.16
Pipeliner	3.15
Xiaoshouyi	3.08
Insightly	2.97
Copper	2.79
Vtiger	2.62
X2Engine	2.42
Freshworks	2.19
Pipedrive	2.18
PipelineDeals	2.08

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Figure 3. Vendors' Product Scores for Long-Cycle B2C Sales

Product or Service Scores for Long-Cycle B2C Sales

Vendor	Score
Salesforce	4.12
bpm'online	4.06
Oracle	4.03
Pegasystems	4.00
SAP	3.78
Microsoft	3.76
CRMNEXT	3.53
Zoho	3.51
SugarCRM	3.44
Pipeliner	3.20
Zendesk	3.18
Xiaoshouyi	3.09
Insightly	2.98
Copper	2.84
Vtiger	2.69
X2Engine	2.40
Freshworks	2.19
Pipedrive	2.18
PipelineDeals	2.01

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Figure 4. Vendors' Product Scores for Short-Cycle B2C Sales

Product or Service Scores for Short-Cycle B2C Sales

Vendor	Score
Salesforce	4.13
bpm'online	4.12
Pegasystems	4.06
Oracle	4.03
Microsoft	3.91
SAP	3.84
Zoho	3.57
CRMNEXT	3.54
SugarCRM	3.46
Pipeliner	3.26
Zendesk	3.14
Copper	3.10
Insightly	3.10
Xiaoshouyi	3.04
Vtiger	2.75
X2Engine	2.48
Freshworks	2.36
Pipedrive	2.25
PipelineDeals	2.19

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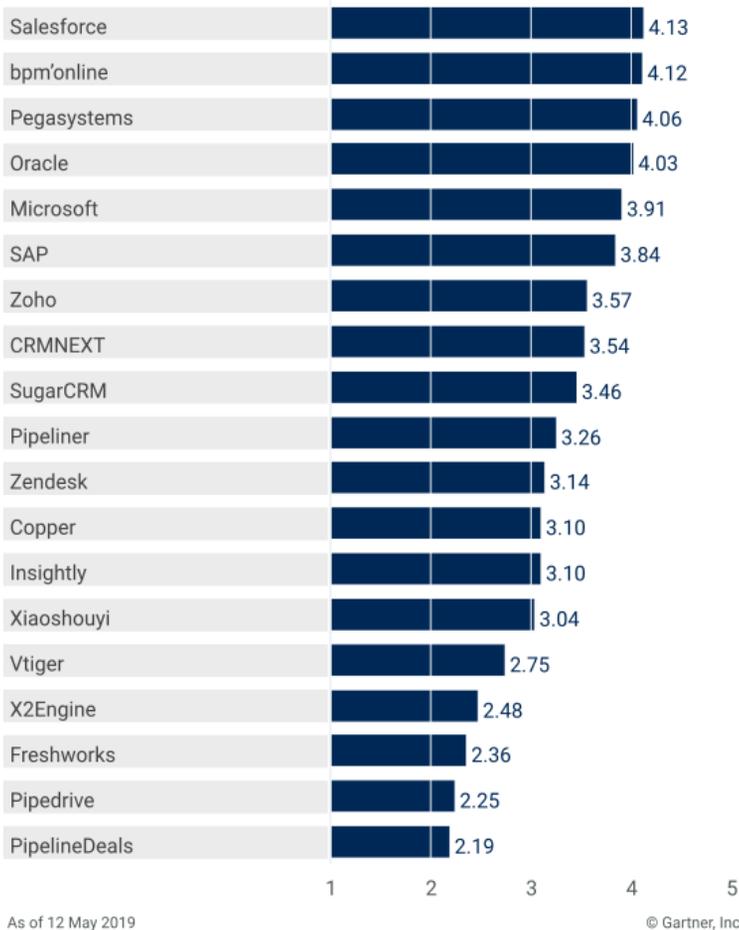
Figure 5. Vendors' Product Scores for Indirect/Relationship Sales

Product or Service Scores for Indirect/Relationship Sales

Vendor	Score
Salesforce	4.22
Pegasystems	4.13
bpm'online	4.12
Oracle	4.05
SAP	3.68
Microsoft	3.58
CRMNEXT	3.55
SugarCRM	3.44
Zendesk	3.25
Zoho	3.17
Pipeliner	3.11
Xiaoshouyi	3.03
Insightly	2.73
Vtiger	2.39
Copper	2.33
X2Engine	2.27
Freshworks	1.97
Pipedrive	1.96
PipelineDeals	1.90
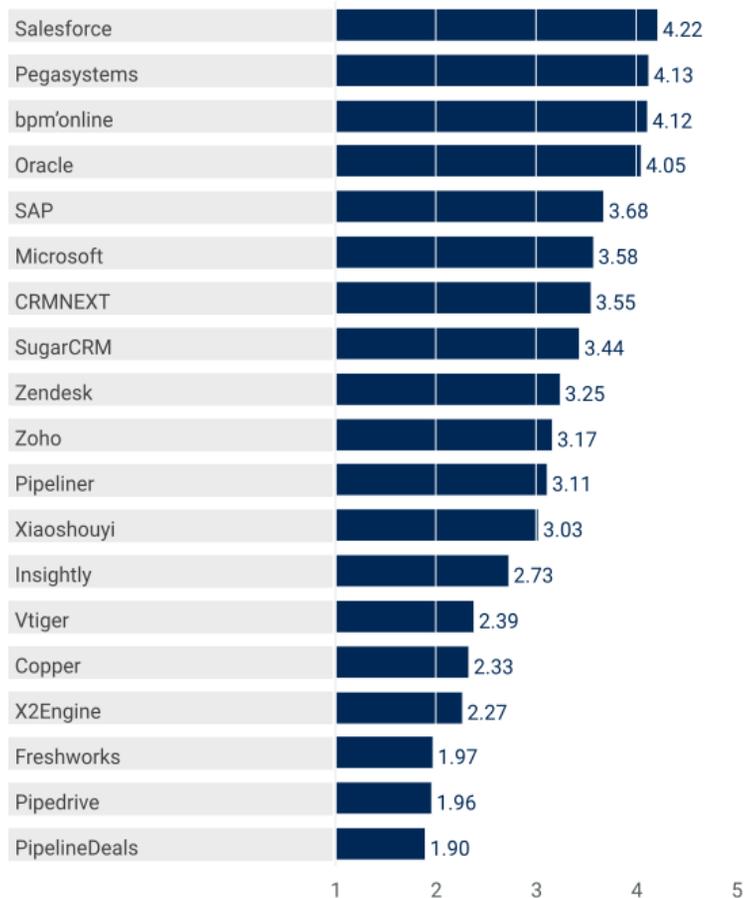
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Vendors

bpm'online

This vendor offers three different business models: bpm'online sales team, bpm'online sales commerce and bpm'online sales enterprise. The SFA product is appropriate for midsize and large companies with complex short- and long-cycle B2C or B2B sales processes. The software is built around the company's low-code application development platform that is based on a business process management suite (BPMS). The product also extends to marketing, lead management and service, and is united by a single common customer data model.

Below are some key distinctions for bpm'online:

Account and contact management: Bpm'online offers account and relationship intelligence through real-time scraping of attributes and features native predictive account scoring, which can be customized by administrators. It offers API integration to third-party sources such as DiscoverOrg. Although it provides a visual account hierarchy, it cannot do multiple account hierarchies for different selling teams.

Activity management: Bpm'online provides tools to maintain sales rep calendars, plan activities, create group tasks and set up automatic reminders. It includes computer-telephony integration (CTI) for call handling. It also provides automatic capture of notes and emails with integration to Outlook and Gmail.

Opportunity management: Bpm'online provides out-of-the-box functionality for opportunity management including a Kanban board that can contain custom stages. It offers predictive analytics for opportunity health scores and predicted number of days to close an opportunity.

Forecasting: Bpm'online offers limited capabilities for forecasting and does not provide an out-of-the-box forecasting module.

Reporting and dashboards: The vendor offers a number of dashboards and reports out of the box. End users will find creation of reports experience to be user friendly with advanced mathematical capabilities for custom calculations and features for heat maps and trend analysis.

Integration and platform: The vendor offers open APIs and a low-code development environment where processes can be customized by end-user organizations. For opportunity record visibility and security, bpm'online offers delegated access that controls record access, Visual Studio business process management workflow capabilities and REST API integration.

Mobile: Bpm'online offers mobile SFA apps for Android, iOS and Windows using Apache Cordova and native plugins to interact with native mobile functions. The mobile app wizard allows drag-and-drop functionality to create and modify layouts. A software development kit (SDK) works with geolocation services, and a device's camera and photo library, and supports offline operation and later synchronization

Copper

Copper CRM is an SFA product for relationship sales and SMB B2B sales, and is appearing in this Critical Capabilities research for the first time. Copper CRM natively integrates with Google's G Suite applications, and runs as a plug in for Gmail. The product features the core SFA functions, as well as native extensions including relationship intelligence, lead management, and quota management. Compared to other vendors in this research, Copper lacks the same scope of native application and quote like configure price and quote (CPQ). The application has several meaningful usability features. For example

users can create new opportunity records from a fly-out widget on the homepage. Users can set record visibility rules for newly created records from the edit page.

Key distinctions for Copper include:

Account and contact management: The system can catch duplicates during the record creation and edit processes, but it matches only on company name, and does not use fuzzy matching logic. The application lacks a native householding function, which is a consideration for companies with B2C use cases.

Activity management: Copper CRM runs as a native Gmail plugin, which means that users do not have to switch applications to complete CRM functions. It supports Outlook email and calendar integrations, but does not have a plug in for the Outlook client.

Opportunity management: Products and price books are not native to Copper CRM, which is a consideration for companies that require opportunity product line items. Administrators can build custom sales processes for different sales teams. Deals can be managed by expected revenue, but not by expected product quantity. The product does not have predictive opportunity scoring.

Forecast management: The product supports pipeline management functions, and has an "include in forecast" indicator on opportunity records, but it lacks a module for monthly forecast management.

Integration and platform: The product has several meaningful platform functions for application customization, such as time-based triggers, calculated fields, and workflow rules. It also has an extensive list of native integrations to G Suite applications and third-party integrations, such as HubSpot and Xero.

CRMNEXT

CRMNEXT provides a holistic CRM product suite with multiple versatile modules on a unified platform and code base. Sales automation is an inherent modular part of the CRMNEXT platform offering that can be bought with other modules. Its SFA product has a good user interface, particularly for highly transactional sales processes. The product features the core functionalities and includes BOTNEXT and DATANEXT components, which are used to power sales automation with AI, big data analytic, natural language processing (NLP) and machine learning (ML) capabilities. CRMNEXT is strong in both B2C use cases, but also short-cycle B2B.

Key distinctions for CRMNEXT include:

Activity management: CRMNEXT can track activities at an account level, but also via email templates, and provides overviews of activities in its account record activity tab. The application lacks a Microsoft Outlook plugin for updating SFA records directly from the email client.

Opportunity management: CRMNEXT provides buying propensity views based on different criteria, such as the level of engagement, priority scores, recency, monetary rating and frequency of interactions. These views allow for dedicated cross-sell and upsell opportunities. Opportunities can be linked as parent/child records, which is important for account team selling. The opportunity prediction model reviews 21 different attributes.

Forecast management: The product has out-of-the-box forecasting by territory, but also has algorithmically determined forecasting predictions, such as expected amount or closing date. It lacks pipeline inspection functions common in some leading SFA products.

Reports: CRMNEXT has strong reporting capabilities and comes with a solid set of preformulated reports, which can be leveraged by customers. Tweaking can be applied through filtering and sorting options only.

Mobile: The mobile app includes a conversational interface for updating SFA records. It lacks offline record editing functions, and a few of the SFA functions available in the full browser version of the product.

Partner relationship management (PRM): PRM supplements CRMNEXT's full suite approach by supporting its customers to manage direct and indirect sales channels on the same applications.

Freshworks

Freshworks Sales Force Automation product is its Freshsales, a SaaS product that is hosted on Amazon Web Services (AWS). It currently has global deployments of its solution, but mainly caters to the SMB market (up to 200 users). It can support larger deployments if needed. Freshsales can support all B2B and B2C sales use cases, but is not best suited to indirect sales. Freshworks Freshsales can support all SFA functionality, except forecasting. In 2018, it released capabilities such as Office 365 calendar integration, additional reporting features, and integration with QuickBooks to track invoicing and payments.

Key distinctions for Freshworks include:

Account and contact management: Accounts and contact records are enriched via a partnership with Clearbit. Freshsales also includes bulk merge and duplicate detection features except duplicate detection is not enabled upon record creation. Freshsales includes some AI account scoring functionality, however, it is not customizable. There are no visual hierarchy views for account and contact records. LinkedIn and Twitter integrations are basic, only at the profile hyperlink level within CRM.

Activity management: Freshsales has native CTI. The email integration for Outlook and Gmail does not support single sign-on, and the email interface integrates via IMAP only (no POP server integration). It does have the ability to track emails opened and clicked, and can synchronize appointments

Opportunity management: The solution has a customizable pipeline management process, with the ability to customize at the stage level and for each market served. It also includes a chat function for collaboration. Administrators cannot add custom objects, and Freshworks will only build these on an "as needed" basis. There are no opportunity splits or revenue scheduling capabilities. The AI functions only score opportunities based on historical information, and cannot be customized.

Forecast management: The application lacks native forecasting capabilities. It can track the revenue of potential deals at the opportunity level, not at the product level, which is a consideration for companies with multiproduct deals.

Reports and dashboards: Although users can create custom dashboards, they are not real time, and cannot be embedded in any part of the application other than the reporting tab. Custom values and logic can be created to support advanced analysis.

Mobile: Supports only leads, contacts, accounts, and deals objects within the mobile app. Email, as well as call tracking and logging capabilities, are

but not voice to text transcription.

Partner relationship management: PRM functions are not offered, and can only be met with integration to third-party providers.

Platform and integration: The platform offers API and webhook integration capabilities. The platform has limited customization, with no ability to create custom objects or change the page layout. The platform does provide workflow creation on record type, and can be automatically triggered to execute. Also supported are declarative functions. Permission sets can be managed at a global, territorial, or restricted access level.

Insightly

Insightly CRM is a SaaS-only product that features all of our critical capabilities, except for the full span of partner relationship management. The SFA product's most notable capability is its relationship intelligence functions, which are helpful for determining the strength of relationships with decision makers. The application also includes a native project management module, which is useful for high-tech and professional services companies that need to coordinate their sales and services processes. In the past year, Insightly rearchitected the product, adding a new metadata-driven application architecture. Insightly CRM does not have the same level of capabilities displayed by the leading vendors, such as complex forecast management and predictive forecasting, but the product's span of capabilities is still relevant for midsize B2B organizations.

Key distinctions for Insightly include:

Account and contact management: The product's deduplication and record merging function is supported by a native, embedded Clearbit integration. The same function can be used for master data management functions. The account and contact engagement score is driven by recency of interactions and external factors, like status of service tickets managed within Insightly.

Activity management: The application integrates with Gmail and Outlook. The plugin for Gmail features a function for writing emails using templates stored in Insightly, which saves users time spent switching between applications. It creates new contract records automatically from email records. Users can link a meeting event to the multiple data objects stored in Insightly.

Opportunity management: Users can create opportunity line items from price books and product catalogs. Notably, users can also associate more than one price book with a deal. The opportunity health score is solely rule-based, lacking the predictive AI scoring that leading vendors in the market feature. Mismatched font sizes and colors detract from system usability.

Integration and platform: With the expansion of its metadata-drive architecture, this product has a meaningful span of platform functions. Administrators can build custom workflow rules, calculated fields, time-based triggers, and custom objects. They can also write connectors to third-party apps using Zapier.

Mobile: The native mobile app can be modified with custom objects and dynamic page layouts, but lacks offline functionality.

Microsoft

Microsoft Dynamics 365 for Sales is the sales application provided within the Microsoft Dynamics 365 Customer Engagement suite. It features advanced sales capabilities, such as predictive analytics for measuring relationship health or predictive analytics for monitoring leads. It can be deployed as SaaS or on-premises, and can be used for all B2B, B2C and relationship sales use cases. In late 2018, Microsoft released AI for Sales, its artificial intelligence offering meant to augment existing sales processes. More recently, the company released Customer Insights to help bring additional AI-related capabilities to the sales application in the form of profile enrichment, and a 360-degree view of the customer.

Key distinctions for Microsoft include:

Account and contact management: The product features an advanced search function to help find all record types within the CRM. The master data management functions are natively embedded from an integration with Versium DataFinder, which can be used to augment and cleanse account records in real time. The solution includes a "relationship intelligence" function that pushes proactive insights from news feeds from LinkedIn into Dynamics 365. In addition, Dynamics 365 Customer Insights can be used to enrich profiles further for contextual guidance and predictive analytics, however, it is an additional cost.

Activity management: The product includes full integration with Outlook and Gmail (except the latter integration is missing Google calendar integration). The product also has a relationship assistant that pushes preplanning activities, and flags which specific items need your attention.

Opportunity management: Administrators can build guided selling processes and automated opportunity splits using a visual process designer. The application lacks the same level of revenue schedule functionality found in some leading SFA products. It does have predictive scoring on opportunities, history of interactions and time spent, and response rate on opportunity, which can help with sales pipeline prioritization.

Forecast management: The SFA product lacks pipeline inspection and forecast categories, functions that are important to companies with complex forecasting processes. Advanced forecasting is done through Power BI, which is an additional cost.

Reports and dashboards: The application includes sales-specific dashboards with Power BI called Microsoft Dynamics 365 Content Pack for Sales and through PowerApps but does not report on non-CRM data. Advanced visualization and data mining is available as an add-on through Power BI for an additional price.

Mobile: The mobile and desktop implementations have a unified interface. Developers can configure the mobile app, but it is not possible to do full custom development, and it does not have full offline functionality. Microsoft depends on vendors (like Resco) that do full mobile app development for applications like Dynamics 365 for Sales for this functionality.

Platform and integration: The SFA product can be extended using PowerApps, Microsoft Flow, and Power BI. The product also integrates with Microsoft Common Data Service, which links common entities across ERP and CRM applications.

Oracle

Oracle Engagement Cloud, is a SaaS-only SFA product with a broad set of sales process capabilities. Oracle CX Sales is relevant for all B2B, B2C and indirect sales use cases. The SFA product can be extended with other native Oracle sales technologies, including quota and incentive compensation management, CPQ, customer master data management, partner relationship management, and AI. In the past year, Oracle has enhanced its mobile solution with client-side scripting to augment its offline capabilities, and added intelligence to identify recent records based on the mobile user's location. In the past year, Oracle has updated the user interface, but it lacks the same degree of user friendliness displayed by the leading vendors in this study.

Below are some key distinctions for Oracle:

Account and contact management: Oracle has a strong third-party data integration with DataFox, and Oracle Data Cloud can enrich account and contact data from sources like Dun & Bradstreet. Scoring and merging capabilities are native to Engagement Cloud. Administrators can adjust the account and contact data using fuzzy logic deduplication algorithms that govern automerge functions, thus improving the quality of the matching and merging process. The process can both create and update parent and child records.

Activity management: Oracle is integrated with Outlook, Dynamics 365 and Gmail, and provides automated capture of activities, reducing the workload and increasing ease of use for sellers. Click-to-call capabilities are provided through open-source vendors. It has a contact relationship graph, which is useful for revealing which employees have interacted with a contact.

Opportunity management: Oracle Engagement Cloud's embedded machine learning models include recommendations with AI-guided selling and coaching. Opportunity scoring that was part of the DataFox acquisition also provides additional account signals.

Forecast and Quota Management: Oracle includes predictive forecasts and predicted upside with configurable time periods. Users can view up to five years' worth of year-over-year and week-over-week trend comparisons.

Integration and platform: Oracle provides a visual builder with low-code methods for customizing the user interface. Oracle also includes custom workflow abilities. Oracle has first-party integrations with other Oracle Clouds, such as CPQ and Marketing Cloud. Oracle ERP and HCM Clouds work with Engagement Cloud out of the box.

Mobile: The mobile app can be customized with a declarative app designer. It also includes several SMS-based AI skills that allow users to update SFA data, such as closing opportunities, using the messaging app on their mobile device.

Pegasystems

Pega Sales Automation v 8.2 provides support for the direct and indirect sales organization, and serves some of the largest insurance companies in managing their indirect sales channels with external contractors and noncaptive agents. Pegasystems' SFA package comes unified within the Pega Infinity platform and can be used in conjunction with Pega Marketing and Pega Customer Service. Pegasystems has pushed strongly to build out its developer community through the Pega Community online group. Pegasystems has made improvements to its SFA product in the areas of AI, digital process automation and its own platform: Infinity.

Key distinctions for Pegasystems include:

Account and contact management: Pegasystems includes a connector to Dun & Bradstreet, which can be easily downloaded. Once installed, it provides an "enrich button" in the application, which will augment the selected account data.

Activity management: Customers can set up rules to automate lead assignment and other activities sellers. These rules comprise of a set of predefined criteria, which includes the ability to assign to the most appropriate seller, by focusing on skills or skills sets. Customers can run multiple distribution rules simultaneously.

Opportunity management: The comprehensive AI functionalities provided by Pegasystems are of value when predicting the probability of winning an opportunity. It furthermore allows for opportunity scoring. To conclude a deal, CPQ functionalities are provided, but the CPQ product is currently not included in the standard SFA package and needs to be purchased separately.

Forecasting management: With comprehensive predictive, ML and automation features, the application supports automation of forecasting processes. Pegasystems provides weighted, predictive weighted, and unweighted views and forecasts.

Reports: Pegasystems comes with a comprehensive set of standard reports and is focused on providing advanced analysis such as trend analysis.

Pipedrive

Pipedrive is a SaaS-only provider that is hosted by Rackspace in the U.S. and EU. It is best for SMB organizations that are looking to deploy it for up 200 sales representatives, although it can support a larger implementation. It is best for short-cycle B2B sales or long- and short-cycle B2C sales. The solution can support all common SFA capabilities (such as account and contact management, activity management, and opportunity management) and has smooth integration with both Outlook and Gmail calendaring solutions.

Key distinctions for Pipedrive include:

Account and contact management: Pipedrive covers all of the basic capabilities for account and contact management, with the ability to use third-party commercial services, namely using Clearbit to pull emails and social profiles within accounts. Administrative permissions can be set at the same time as contacts and accounts are created rather than after. Type-ahead search capabilities are built-in, but do not include associate account and contact records.

Activity management: Pipedrive provides native activity management functionality, including a built in scheduler, which can send proposed meeting times to clients via iCalender and sync back into Pipedrive. The solution lacks advanced sales planning functions. Outlook and Gmail integration is fully supported with the ability to view open tracking (if customer opened email), who and how many times they interacted with the email.

Opportunity management: The solution allows for customization of sales stages for different sales teams, and has a master product list that offers standard pricing and discount management. The product lacks predictive opportunity scoring.

Forecast management: No advanced forecasting functionality, however, the solution does allow for opportunities and pipeline management of open versus predicted based on user input.

Reports and dashboards: Can create multiple dashboards and switch views with a limited number of standard reports. In addition, the solution does provide a leads and opportunity velocity report.

Mobile: Pipedrive has a virtual digital sales assistant for updating CRM objects, such as activities, notes and appointment scheduling.

Partner relationship management: Pipedrive does not have PRM functionality.

Platform and integration: Pipedrive platform has an open API component for developers. Users can add permission sets at the hierarchy level, and on

PipelineDeals

PipelineDeals is an AWS-based SaaS offering. The application is appropriate for small B2B sales organizations. PipelineDeals offers core SFA capabilities albeit at a basic level — such as contact, account and opportunity management — as well as native lead management capabilities that support basic B2B selling processes. It also offers sales acceleration functions for sales development representatives, a capability that most other vendors in the SFA market do not offer. Customers of PipelineDeals in the Magic Quadrant reference survey gave the vendor above a 4 average rating for all of the critical capabilities tracked by Gartner.

Below are some key distinctions for PipelineDeals:

Account and contact management: PipelineDeals provides APIs but does not integrate to any data enrichment/commercial data service provider. The system can manage account duplicates but only manually. No native functionality exists around maintaining account hierarchies. There is no integration to LinkedIn, only surfacing a profile link inside the CRM to the respective account or contact.

Activity management: PipelineDeals users can automatically associate emails with contact records once it is set up manually the first time. Integration is provided for Office 365, Outlook, and Gmail. Optimization of daily activities is limited, such as appointment setting and upcoming meetings.

Opportunity and pipeline management: PipelineDeals offers simple but effective pipeline management functions, such as automated indicators of at-risk deals, and sales acceleration capabilities for sales development representatives. However, it does not have the ability to do advanced opportunity management functions such as maintaining different processes for different sales teams, managing anticipated revenue schedules, or maintaining price books and product hierarchies.

Forecasting management: PipelineDeals lacks advanced forecasting capabilities (such as forecast categories) that are common to the leading SFA vendors. Only basic forecasting capabilities exist such as viewing opportunities forecast at the user level. The vendor does not provide any quota management capabilities, instead it only displays quota improvement over time.

Partner relationship management: PipelineDeals does not support PRM functionality.

Mobile: The vendor provides a native SFA app for both Android and iOS devices. It allows voice recording of activity functions, and features the same functionality as the desktop version of the application

Pipeliner

Pipeliner CRM is a SaaS-only solution hosted on AWS. SMB and midsize enterprises will find Pipeliner CRM an attractive option if they are involved in B2B sales. The product supports most SFA capabilities, including account and contact management, opportunity management, and mobile. Because it lacks partner relationship management capabilities, Pipeliner is not the best option for indirect sales use cases. In 2018, Pipeliner released its quoting functionality via an integration with PandaDoc, and has worked on improvements to its reporting in the form of drag-and-drop abilities for columns and changing various layouts.

Key distinctions for Pipeliner include:

Account and contact management: Pipeliner CRM has rich search capabilities across accounts and contact records, allowing for deeper search on opportunities, note, or leads. It is integrated with Clearbit and FullContact for data enrichment, and displays a duplicate indicator when users attempt to enter a duplicate account record. Merging records must be manually executed. The product does not have account intelligence capabilities or account health scoring functions. Pipeliner does have a web browser widget that allows it to synchronize contact information from LinkedIn or Twitter, but it does not offer a CRM-view of the two applications.

Activity management: Although Pipeliner CRM has free plugins for Outlook and Gmail, emails still need to be manually synchronized. You can view opportunities, leads and activities within both integrations on the email client.

Opportunity management: Pipeliner CRM can customize sales processes, add stages, and adjust individual user rights. Pipeliner has a Kanban view of opportunity records for its display. It can only do opportunity splits by revenue not by product. It also does not have predictive analytic capabilities for opportunity scoring.

Forecast management: Although Pipeliner only has standard forecasting capabilities (such as against opportunity revenue) it does have a nice visual overlay. Other categories include won versus forecast, and monthly or quarterly quota attainment. Predictive analytics for forecasting functions allow users to monitor change against target quotas. The filtering options can be difficult to use.

Reports and dashboards: The product has standard reporting functionality with some minimal capabilities for trend analysis and reporting on custom fields. This is predominantly dependent on filtering different views, which is not customization.

Mobile: Pipeliner has full SFA functionality for mobile devices including offline. It allows for extensive configurability of the app, such as drag-and-drop components to prioritize viewing options. The app includes mobile voice functions to record and view all CRM records.

Platform and integration: Pipeliner CRM is fully open, and API, REST and GraphQL capable. There are limited options to customize the application, and you can only change the UI by moving fields and columns. Pipeliner does not have workflow functionality as it is dependent on filtering and rules set within each record.

Salesforce

Salesforce Sales Cloud is a SaaS-only SFA solution that provides a broad range of native sales automation capabilities that are applicable for all B2B, B2C and indirect sales uses. In addition to Sales Cloud, the vendor also offers add-on products for CPQ, marketing automation, and partner relationship management. In 2018, Salesforce released High Velocity Sales, an add-on product for inside sales processes. Salesforce also updated the Sales Cloud Einstein offering, adding expanded predictive forecasting functions. It also updated the Lighting Experience version of Sales Cloud with sales functions only available in the Classic interface.

Key distinctions for Salesforce include:

Account and contact management: The application offers several functions for catching and resolving duplicate records entered by users. Firmographic attributes can be maintained in real time via an OEM connection with BlueTail data services, or via a connection to data providers on the Lightning Data Service. The Customer 360 product announced in 2018 only supports consumer contact matching across Salesforce organizations. It does not yet support B2B account and contact matching. Predictive account health scoring is available only with Einstein Analytics.

Activity management: Salesforce offers a mobile sales productivity add-on via Einstein that automates how sellers manage their daily emails, calendar events and opportunities. The team calendar function can display nonactivity events, like opportunity close dates. Precall planning functions are offered with the High Velocity Sales product or via Lightning call scripts.

Opportunity management: There are no limits to the number of custom sales processes that can be deployed in product. Guided selling functions are native in Lightning Experience via the Sales Path component, but the product does not yet integrate with the opportunity predictive analytics in Einstein. Opportunity splits update the pipeline of the sellers included in the split. Users can manage opportunity schedules by both quantity and revenue.

Forecast management: The Collaborative Forecasting module offers strong a range of functions, and is suitable for large B2B sales organizations with multiple sales teams. It cannot be customized with custom forecast categories. Sellers can update forecasts using predictive opportunity health scores surfaced by Einstein. Pipeline inspection functions are limited, and some companies will have to also purchase Einstein Analytics to achieve the same capabilities offered out of the box by some third-party providers.

Partner relationship management: The vendor offers a notably wide range of PRM functions that integrate natively with Sales Cloud, such as routing lead and opportunity to indirect partners. It also includes advanced PRM functions natively, including marketing development fund requests, rebate requests and marketing campaigns.

Platform and integration: Salesforce has a notable scope of platform capabilities for customizing Sales Cloud, including the ability to create complex workflow processes, or to build componentized applications with the Lightning App Builder UI designer. The vendor has several different types of API-based integration endpoints, which are important for companies that have substantial integration requirements.

SAP

SAP's Sales Cloud CRM is a SaaS-only offering aligned with the company's C/4 HANA application architecture. This product satisfies all features of the market, except for the full span of partner relationship management. The product is suitable for all use cases examined in this Critical Capabilities study. Companies in the consumer goods and life sciences industries will note that SAP offers vertical-specific products that integrate with Sales Cloud CRM, a consideration that is important for SAP ERP clients that want highly targeted solutions. SAP also offers CPQ, predictive forecasting, and incentive compensation solutions via its acquisition of CallidusCloud.

Key distinctions for SAP include:

Account and contact management: The product provides account sentiment analysis features (which support the buyer journey analysis) and natively integrated automated life cycle management of accounts and contacts. It has a unique graphical function for displaying the relationships between contacts in an account. Duplicates are only surfaced when users save the record, and the application lacks the same type of real-time, instantaneous-update firmographic attribute common to some other vendors.

Activity management: Uncommon for the other SFA vendors included here, SAP comes with visit and route planning for sellers. It has a full activity planner included, and activities can be assigned to users, but also to teams. It furthermore provides a multiple-calendar view.

Opportunity management: SAP provides the ability to allow opportunities to contribute to forecasting (or not). It lists the activities performed to an opportunity in its pipeline view. The product lacks a Kanban view of opportunities.

Forecasting: Pipeline inspection functions, as well as a measurement of quality of interactions with prospects associated with a forecast deal, are available via an add-on purchase.

Partner relationship management: SAP has a notable depth of dedicated PRM capabilities.

Mobility: SAP provides offline capabilities for all data objects, and allows for drag-and-drop functionalities. It furthermore allows for automatic call logging, such as last call placed.

SugarCRM

The SugarCRM SFA application, named Sugar, features all of the abilities that Gartner tracks, including platform and partner relationship management. Sugar can be deployed via public cloud, private cloud, on-premises or hybrid deployments. The SFA application is best suited for organizations with 200 to 5,000 users, particularly those that want to build heavily customized, workflow-intensive applications for B2B, B2C and indirect sales use cases. Sugar does not provide natively integrated predictive analytics capabilities, and relies on third-party applications (such as Marketo) for lead scoring. In 2018, SugarCRM released an update to comply with the General Data Protection Regulation (GDPR), as well as 62 new out-of-the-box reports for sales purposes. More importantly, the company has enhanced its mobile application to include quoting functionality, which will help with field sales.

Below are some key distinctions for SugarCRM:

Account and contact management: The Hint add-on product can help with data enrichment and allow users to uncover insights about a business relationship through public and social profiles. It can also use email to determine the strength of a relationship between two contacts based on frequency of communication, which can be useful for "who knows who" and "warm" introductions. This capability is integrated into the account and contact management functions.

Activity management: SugarCRM integrates with Outlook, and the recent acquisition of Collabspot has resulted in more robust Gmail integration than was available last year. This allows SugarCRM to fully work inside the Gmail user interface.

Opportunity and pipeline management: Users can create both product quantity and revenue schedule opportunities, although the latter are only show by expected close date. Opportunities can be split at the product/service line item level. In addition, users can create subordinate opportunity records, associated with parent opportunities, which can be most commonly seen in complex B2B sales.

Forecasting management: The SFA application provides some advanced forecasting functions, such as at the line item level or opportunity level. Users can build multiple forecast drafts, allowing them to model their predicted revenue in future months before submitting a committed forecast to managers. Forecasts can be split by sales representative, product categories, or territory. The product does not have predictive sales forecasting.

Reports and dashboards: Reports and dashboards are deployed as componentized containers, known as "dashlets." SugarCRM uses a wizard-like functionality to build reports, and these can be reused across desktop PCs and mobile devices.

Mobile: The vendor provides a declarative SDK for configuring and building custom mobile apps or for extending the standard SFA capabilities. It allows you to preview layouts for mobile devices before deploying, and also has full offline capabilities.

Platform and integration: The SFA product can be extended with custom fields, data objects, and workflows using the vendor's declarative application design toolkit. Advanced workflows can be built using a layout designer, but it does not have a drag-and-drop user interface.

Vtiger

Vtiger Sales CRM has a scope of SFA functionality that is most suitable for small B2B organizations with basic sales processes. The "enterprise" version of the product features a bundle of capabilities that go beyond basic SFA, spanning from lead management to invoice management. The product also offers a project management module, a component offered by few other SFA vendors. Over the last year, Vtiger has introduced an inventory add-on to help automate order processing and purchasing processes. It has also delivered a new chat function for sales, marketing and support to interact with website visitors as well as customers. Vtiger Sales CRM has several good usability functions, as noted below, but its overall usability and user interface trails behind those of the leading vendors in this study.

Some key distinctions for Vtiger include:

Account and contact management: The application features useful functions for viewing all recent interactions with a contact, and displaying all interactions across all engagement channels in a real-time feed. The product has a Chrome browser plug-in that allows users to update contract attributes directly from data stored in LinkedIn.

Activity management: Vtiger provides integration with both Outlook and Google email and calendars. Emails sent by Office 365 users are automatically synchronized with SFA records via a polling function that runs every 15 minutes. The application lacks a precall planning module, a function that is important for B2B sales use cases, but it does offer trip routing.

Opportunity management: The product has opportunity product line items and product bundle functions, capabilities that are important for all sales use cases. Vtiger also offers custom Kanban categories for different types of selling processes. Opportunity splits are not supported. The product does not offer predictive models for opportunity scores nor prescriptive next-best-action recommendations.

Reporting and analytics: Vtiger provides both web and mobile real-time dashboards, and can analyze sales pipelines and activities with its content pack for Microsoft Power BI.

Mobile: Mobile features include voice notes that link to an opportunity and offline capabilities.

Partner relationship management: PRM capabilities are limited to sharing lead and opportunities to a portal maintained by Vtiger.

X2Engine

X2CRM, the SFA product from the vendor X2Engine, includes core capabilities such as account and contact management and opportunity management along with additional features for workflow, pipeline management and marketing automation. The product is relevant for B2B and B2C sales use cases. Users can personalize their dashboards and home screens, but the application lacks the visual quality and usability common in the leading vendors in this report.

Below are some key distinctions for X2CRM:

Account and contact management: Customers can purchase and connect with DiscoverOrg for commercial data services, which will add account information. Currently there are no relationship intelligence features available.

Activity Management: X2CRM provides the ability to integrate with Microsoft Outlook 365 (including calendars) as well as Google Gmail, Calendars and Maps. Inboxes can be shared between sellers, and sellers' calendars can be viewed at the team level for ease of meeting scheduling as well as review.

Opportunities: X2CRM provides the ability to create and maintain opportunity splits while providing tracking on changes. Splits can be assigned to territories or end users.

Partner relationship management: X2CRM can share leads and opportunities to an external portal, but does not provide the full span of PRM capabilities.

Platform and Integration: X2CRM can customize its standard object model, and create custom fields, workflows, modules or custom applications. It has a BPM modeler for custom workflow that can invoke the role hierarchy.

Mobile: X2Touch is the mobile application that works on both iOS and Android. The full X2CRM is also available via a browser on mobile devices. System administrators can customize what data is displayed in the mobile forms.

Xiaoshouyi

Xiaoshouyi is a SaaS-based software company with a mobile-first SFA application and SaaS platform. The application's core native capabilities (such as account and opportunity management) and the near-core capabilities (such as content management, CPQ and order management) apply to B2B and B2C use cases. Xiaoshouyi's platform will be attractive to selling organizations that require a custom sales tool, those that want to build custom mobile apps, or those that want to tightly connect their lead and contracting processes together. In the past year, Xiaoshouyi has improved its partner relationship management capabilities and reporting and dashboard capabilities.

Below are some key distinctions for Xiaoshouyi:

Account and contact management: Xiaoshouyi provides account health scores that are dynamically created and weighted. For the scoring scheme, both math and logic can be customized.

Activity management: Xiaoshouyi delivers unique capabilities for social communication, such as integration with WeChat and WeChat Mini apps, which is useful for B2C use cases. The application does not natively integrate with Gmail or Google Calendar.

Opportunity and pipeline management: Different sales steps can be created based on permission and without limit. Kanban views are based on each business type. Multiple price books are supported, as well as revenue schedules. Visuals sliced by product are provided in the revenue schedules.

Forecasting management: Forecasts are provided with good visualization. "Visual workbooks" — a collection of dashboards and reports — make navigation clear. Forecast snapshots — used for pipeline inspection and audit trail reporting — include custom time periods.

Zendesk

Zendesk Sell is a SaaS-only, mobile-first SFA product that provides meaningful capabilities for B2B sales use cases. The product features an easy-to-use interface that simplifies manual data entry with automated information capture functions. The application also has native functionality that automatically pushes sales activity insights to users, such as notifying them when a business contact has read an email. It features good usability functions, such as suggested matching contact records when users create new lead records. Zendesk Sell lacks extensive partner relationship management functions, and does not provide the same level of platform capabilities common to the leading SFA vendors featured here.

Key distinctions for Zendesk include:

Account and contact management: The application features white-label connectors to Clearbit for building prospecting lists or pulling real-time firmographic data updates. Users can easily track the latest interactions with contacts via a real-time conversation feed.

Activity management: The SFA application simplifies data entry with one-click call activity capture and voice-to-text transcription of call activity notes. The application analyzes emails to detect negative sentiments that may impact deal probability rates.

Opportunity management: Uncommon for other vendors in this research, users can move a deal across pipelines. The application includes product lists, price books, and promotional pricing within price books. Opportunity health scores are based upon days since last communication or attribute scores. Predictive AI opportunity health scoring is lacking.

Forecasting: The product supports opportunity forecasting, including forecast categories. Managers cannot override seller-submitted forecasts, nor can users split deals into multiple forecasts or forecast by revenue schedules. The application also lacks a forecast audit trail, which is important for businesses that require pipeline inspection functions.

Mobile: Mobile capabilities are notable. The SFA application is built as a mobile-first user interface. It includes advanced functions like geofencing, proximity filtering of leads assigned to sellers, and offline record access.

Integration and platform: The application can be extended with custom fields on standard data objects, but cannot be extended with custom objects or custom workflow processes.

Zoho

Zoho's SFA product is offered as part of the SaaS-only Zoho CRM suite. It is suitable for the SMB to larger midmarket companies in B2B, B2C, and indirect sales use cases. For SFA, the product includes the ability to manage sales activities, forecasting, products and price books, pipeline management, quote, order, contract management, lead management, and relationship intelligence. The Zoho CRM suite includes a significant number of native product components, notably CTI telephony API connectors, marketing automation, and the ZIA AI platform. The SFA product features good usability features, such as an attractive UX layer and a quick filter function for record searching. In the past year, Zoho has added GDPR compliance, a native consent management function, and a data subject rights function.

Key distinctions for Zoho include:

Account and contact management: The application features native ZIA data enrichment to prepopulate new account records with firmographic data collected from public data sources. The Zoho browser plug-in for LinkedIn Sales Navigator prepopulates contract attributes that are publicly available on LinkedIn profiles. Buyer engagement scoring is only calculated with custom scoring rules, and lacks the AI-based engagement scoring common to other vendors.

Activity management: The sales signal function notifies sellers when a prospect has responded to an email or accessed the company's website. With the IMAP email component, users can control the public/private record visibility of newly received emails. A Chrome browser extension allows users to access Zoho SFA records from the Gmail application.

Opportunity management: Organizations with multiple sales teams can build different sales processes and playbooks using the process modeling component. The application includes validation rules and a triggered workflow action to control how sellers manage and update deals. It also features predictive opportunity scoring, which is useful for assessing the relative health of a deal compared to historical benchmarks.

Forecasting management: The application lacks the same depth of forecasting functionality provided by other vendors featured here. Users can track deals within a pipeline, but managers cannot manage submitted forecasts.

Mobile: The native mobile app includes geofencing, seller check-in functions, and offline read/write functions. It also features a voice-driven interface, which allows users to update select SFA records via voice commands.

Reports and dashboards: The baseline SFA product includes standard reports, as well as an advanced analytics module for data visualization and multiple-value trend analysis. It features anomaly detector analytical dashboard components that can be used for identifying exceptions or deviations in a seller's sales processes.

Context

This analysis examines the ability of sales force automation (SFA) vendors to address five common use cases. Depending on the use case, each product's capabilities weightings vary in importance. Furthermore, the five use cases outlined for SFA, and described in further detail below, are based on the five most commonly encountered during client interactions and therefore have the highest buyer interest.

SFA has distinct implications for different types of sales organizations:

Product-driven, transactional sales organizations — such as those involved in short-cycle B2B sales — will find value in basic lead and opportunity management capabilities to reduce sales cycles and improve sales management visibility.

Product and service organizations selling enterprisewide deals — such as long-cycle B2B sales organizations — will place the highest value on account management and forecasting capabilities. These organizations often also value PRM, CPQ, and sales enablement tools like sales content management. They often tie together proposals, bids, configurations and quotes with authorizations and order-capture systems. Organizations operating in this space require granular forecasting and pipeline management features.

Relationship selling or indirect sales processes — such as those involved with life sciences or consumer goods — require SFA tools that can manage customer and prospect data, but they also require sales enablement tools for content distribution and sales activity capture. They also frequently rely on

custom mobile apps to manage their daily sales activities.

To address the diverse needs of these use cases, Gartner has expanded the definition of the SFA market this year, adding partner relationship management (PRM) and platform capabilities. Gartner has also changed the evaluation criteria for many of the less critical capabilities in this report. This means that the scores of some vendors have changed considerably in this report, compared to last year's.

Gartner also increasingly finds that its clients are looking for systems that are immediately relevant to their selling context. They want out-of-the-box applications that offer business processes and application functions that reflect the best practices of their industry. In the future, Gartner may decide to add more capabilities to the definition of this market to meet these specialized needs, but there are no immediate plans to add vertical-specific functions to our definition of the SFA market.

Meeting that particular expectation, however, is not always possible. As noted in the Key Findings, most SFA systems are foundational technologies, necessary for providing the basic skeleton of sales process automation steps. This means that buyers must consider configuration and/or purchasing additional sales automation systems to meet their selling requirements.

Product/Service Class Definition

Sales force automation (SFA) applications automate the sales activities, processes and administrative responsibilities of an organization's sales professionals. SFA is a foundational technology, providing eight core sales execution critical capabilities:

Account and contact management

Activity management

Opportunity management

Forecasting management

Reports and dashboards

Mobile

Partner relationship management

Platform and integration

If you want more information about vendor capabilities and roadmaps for these capabilities, please contact Gartner.

Critical Capabilities Definition

Account and Contact Management

Functionality that allows end users to create and maintain account and contact records as part of a customer management or customer life cycle program. It includes data management, such as data cleansing, appending and deduplication in order to maintain record accuracy.

The functions of account and contact management include the ability to:

Create and maintain account and contact records (by end users).

Create and maintain account and contact hierarchies.

Create and maintain account and contact status values as part of a comprehensive customer life cycle process.

Manage account and contact duplicates.

Integrate with commercial data services (such as Dun & Bradstreet or Hoover's) or with a vendor's own data service product.

Create and maintain householding relationships across consumers.

Use the SFA product as a customer data master.

Provide strategic account management functions.

Integrate with third-party social channels like Twitter and LinkedIn.

Provide relationship intelligence functions for accounts and contacts.

Activity Management

Functionality for capturing sales interactions with prospects and customers. Includes the ability to integrate with a user's existing email and calendar applications.

The functions of activity management include the ability to:

Manage overall activity.

Assign activities to more than one record, such as associating an event to more than one contact.

Create and maintain team calendars.

Integrate with Microsoft Outlook Exchange.

Integrate with Microsoft Office 365 Live.

Integrate with Gmail and Google Calendar.

Optimize daily sales activities with automated functions like precall planning functions or call/meeting location and routing.

Opportunity Management

Functionality to manage sales deals. Includes the ability to customize the default application functionality to match specific sales processes or guided selling requirements.

The functions of opportunity management include the ability to:

Create and maintain custom opportunity process steps that match a company's selling process (such as stages, process steps and next-best actions).

Maintain opportunity record visibility/data security (such as maintaining private access or adding automated record sharing within specific teams).

Manage anticipated revenue and close dates.

Create and maintain selling teams for specific opportunities.

Create and maintain opportunity splits.

Create and view opportunity pipeline reports or views.

Manage guided selling opportunities (such as recommended next-best actions or playbooks).

Create and maintain price books and product hierarchies that match a product master.

Create and maintain opportunity revenue schedules.

Apply predictive analytic models to opportunities.

Create and maintain pipeline reports.

Measure the level of buyer engagement on a specific opportunity and/or propensity to buy.

Forecasting Management

Functionality that allows sales representatives to create and maintain periodic sales forecasts within proscribed forecast categories.

Also includes functions for managers to create and maintain forecasts for a sales team, using functions such as manual forecast category or manual close date overrides.

The functions of forecasting management include the ability to:

Create and maintain pipelines and forecasts (by sales representatives).

Maintain pipeline inspection functions (including monitoring changes to anticipated revenue, close dates, or stages to specific opportunities, and for aggregations of opportunities at the representative or region level).

Create and maintain forecasts for a sales teams, using functions such as manual forecast category or manual close date overrides (by managers).

Create forecasts by territory.

Split forecast opportunities by representative, by territory, or by product category.

Create and maintain quotas.

Reports and Dashboards

Functionality that allows end users to create access reports and dashboards that align with their key business metrics. Also includes advanced analytics, such as trend analysis or custom calculations.

The functions of reporting and dashboards include the ability to:

Offer overall usability of standard reporting and dashboard capabilities.

Create custom reports and dashboards.

Conduct advanced analysis with standard reporting capabilities (such as trend analysis or custom calculations).

Mobile

Includes native mobile apps provided by the SFA vendor that can execute sales processes on mobile smart devices and tablets. Also includes the ability to build custom mobile apps.

The functions of mobile capabilities include:

Native mobile apps that support core SFA functions.

The ability to build custom mobile apps.

Offline functionality.

The ability to use dedicated mobile apps to optimize daily sales activities (such as automated activity capture and prescriptive calendar management).

Partner Relationship Management

Includes functions for automating channel processes such as lead registration, lead distribution and opportunity management.

The functions of partner relationship management capabilities include the ability to:

Create and maintain partner selling models, where leads and opportunities are shared with partners via a web portal.

Manage master data for partners and maintain partner life cycle processes.

Maintain a channel marketing system.

Provide sales execution functions for deal registration, lead management and opportunity management.

Manage channel partner services (including pricing approval management, order management integration, returns management and warranty management).

Create, distribute and maintain reports and dashboards for partners.

Platform and Integration

Includes functions for connecting SFA solutions with master data sources, or with other sales applications via APIs. Includes functions for customizing the standard SFA solutions with custom user interfaces, data tables, process components, or business logic.

Use Cases

Long-Cycle B2B Sales

Deals that require more than two months to qualify and close. May include multiple products, and often requires selling to multiple stakeholders.

Gartner puts more weight upon forecast management in this use case because it is the primary reason why B2B sales organizations purchase and implement SFA systems. Opportunity management is increasingly managed with automated and guided selling functions, particularly prescriptive next-best actions, or AI "salesbots" that automate discrete sales functions. These B2B sales processes also often require near-core SFA capabilities, including PRM, CPQ, content management, and lead management.

Industries with long-cycle B2B sales use cases include:

Enterprise software

B2B2C health insurance

Outsourcing contracts

Engineering projects

Professional services selling enterprisewide service contracts

Short-Cycle B2B Sales

Very transactional sales where deals are expected to be qualified and closed in less than two months, and often involve a single product.

In this use case, Gartner puts the most weight upon account and contact management capabilities because account qualification — particularly identifying the right decision makers in a B2B account — is critical for good sales execution. Accurate capture of sales activities is also an important requirement in these use cases, as are near-core SFA functions like content management and CPQ.

Industries with short-cycle B2B sales use cases include:

Manufacturers selling to distributors or wholesalers

Business software vendors selling to SMBs or to individual business departments

SMB professional services, such as IT services

Short-haul logistics and shipping

Long-Cycle B2C Sales

Direct sales of highly considered products directly to individuals or consumers. The sales process often takes more than two months to close.

Because these processes are often staffed by field-based sales representatives, Gartner puts more weight upon mobile apps and activity management functions. As is the case with long-cycle B2B sales, guided selling and prescriptive recommendations are important requirements. Gartner does not evaluate digital commerce capabilities in this use case.

Industries with long-cycle B2C sales use cases include:

Wealth management

Personal banking

Life insurance

Short-Cycle B2C Sales

Very transactional sales to consumers and individuals for highly considered products or services, but most deals require limited input from sales representatives.

For this use case, mobile capabilities and activity management functions — like Microsoft Outlook calendar integration, and automated synchronization between an email client and the SFA system — are essential. Near-core SFA functions like content management and CPQ are also relevant in this use case.

Industries with short-cycle B2C sales use cases include:

Staffing and recruiting agencies

Personal services (such as gym memberships)

Telecommunications (such as mobile or broadband services)

Utilities

Indirect/Relationship Sales

Indirect/relationship sales use cases are B2B processes where sales resources interact with influencers to pull through demand with direct sales channels.

In life sciences, for example, sales representatives use SFA tools to track their interactions with practitioners, but they do not manage a sales pipeline or a sales forecast, as is common in B2B selling. Consequently, Gartner weights activity management and mobile apps most heavily in this use case.

Industries with indirect/relationship sales use cases include:

Life sciences

Automotive

Property

Casualty insurance

Consumer goods

Vendors Added and Dropped

Added

Copper

Freshworks

PipelineDeals

Pipeliner

Vtiger

X2Engine

Inclusion Criteria

To qualify for this Critical Capabilities study, vendors must meet the same criteria as in the corresponding Magic Quadrant. Each vendor must meet at least five of the following criteria:

Have a technology solution that automates the following SFA critical capabilities:

Account and contact management

Activity management

Opportunity management

Forecasting management

Reports and dashboards

Mobile

Partner relationship management

Platform and integration

Have least 25 customers with live SFA implementations as of March 2019, spanning at least three industries (in accordance with industry definitions established by Gartner).

Have an average number of SFA users per customer (not org/instance) of at least 25 users as of March 2019.

Revenue from SFA software and services of at least $11 million during calendar 2018.

Customers with live SFA implementations in at least three of the five use cases for SFA critical capabilities:

Long-cycle B2B sales

Short-cycle B2B sales

Long-cycle B2C sales

Short-cycle B2C sales

Indirect sales

Made at least one major release with significant functional improvements during the 12 months from April 2018 to March 2019. A new or acquired offering from an established vendor in this market was also considered, if Gartner established that that offering was being sold to customers.

Closed SFA contracts with at least six new, named logos (not new contracts sold to an existing client) during the 12 months from April 2018 to March 2019.

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities	Long-Cycle B2B Sales	Short-Cycle B2B Sales	Long-Cycle B2C Sales	Short-Cycle B2C Sales	Indirect/Relationship Sales
Account and Contact Management	10%	14%	20%	15%	5%
Activity Management	7%	20%	20%	30%	15%
Opportunity Management	25%	15%	12%	5%	10%
Forecasting Management	17%	11%	3%	3%	5%
Reports and Dashboards	5%	10%	10%	15%	5%
Mobile	8%	16%	18%	12%	16%
Partner Relationship Management	13%	1%	5%	0%	28%
Platform and Integration	15%	13%	12%	20%	16%
Total	100%	100%	100%	100%	100%

As of May 2019

Source: Gartner (June 2019)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighed in terms of its relative importance for specific product/service use cases.

Critical Capabilities Rating

Each of the products/services has been evaluated on the critical capabilities on a scale of 1 to 5; a score of 1 = Poor (most or all defined requirements are not achieved), while 5 = Outstanding (significantly exceeds requirements)

Table 2: Product/Service Rating on Critical Capabilities

Critical Capabilities	Bpmonline	Copper	CRMNEXT	Freshworks	Insightly	Microsoft	Oracle
Account and Contact Management	3.5	3.0	3.6	2.3	2.9	3.9	4.0
Activity Management	4.3	4.0	3.3	2.4	3.3	4.0	3.7
Opportunity Management	4.1	2.3	3.6	2.3	3.1	3.6	4.1
Forecasting Management	4.3	1.5	3.3	1.6	2.2	2.5	3.9
Reports and Dashboards	4.2	2.7	4.3	3.2	3.3	4.3	4.5
Mobile	4.2	2.5	3.2	1.3	2.8	3.2	4.0
Partner Relationship Management	4.0	1.0	3.8	1.5	2.0	3.2	4.1
Platform and Integration	4.2	2.9	3.5	2.5	3.1	4.2	4.2

Source: Gartner (June 2019)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

Use Cases	Bpmonline	Copper	CRMNEXT	Freshworks	Insightly	Microsoft	Oracle	Peg
Long-Cycle B2B Sales	4.10	2.31	3.54	2.08	2.78	3.51	4.06	
Short-Cycle B2B Sales	4.12	2.79	3.50	2.19	2.97	3.68	4.02	
Long-Cycle B2C Sales	4.06	2.84	3.53	2.19	2.98	3.76	4.03	
Short-Cycle B2C Sales	4.12	3.10	3.54	2.36	3.10	3.91	4.03	
Indirect/Relationship Sales	4.12	2.33	3.55	1.97	2.73	3.58	4.05	

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Use Cases	Bpmonline	Copper	CRMNEXT	Freshworks	Insightly	Microsoft	Oracle	Peg

Source: Gartner (June 2019)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Evidence

This Critical Capabilities report is based on the same Gartner primary and secondary research that underpins the "Magic Quadrant for Sales Force Automation." See the Evidence section of the companion Magic Quadrant for further details.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.