



SoftwareReviews

A Division of Info-Tech Research Group

Head-to-Head

Customer Relationship Management - Small Business

insightly

Insightly CRM

VS



essentials

Salesforce Starter

This report has been produced by SoftwareReviews on behalf of Insightly, Inc. based on select data from the January 2024 Emotional Footprint Award. For a full report please visit [SoftwareReviews.com](https://www.softwarereviews.com)

REPORT GENERATED JANUARY 2024

Vendor Capability Summary

SoftwareReviews examines 11 core vendor capabilities common across all Software Vendors. These capabilities represent table-stakes expectations for any software vendor, and are critical to driving a strong, long-term relationship between a vendor and a customer. This page provides definitions of the 11 core vendor capabilities that have been measured.

Quality of Features:

The ability of the software to perform at or above industry standards. Feature quality is just as important as quantity. Use this data to determine if this product will do what you are purchasing it to do, easily, intuitively, reliably, and effectively.

Product Strategy and Rate of Improvement:

Purchasing software can be a significant commitment, so it is important to know if your vendor is serious about the need for constant improvement and deliberate strategic direction. Vendors who do not stay on top of emerging needs and trends will not enable you to meet your business goals. Use the data in this section to separate innovators from imposters.

Vendor Support:

The ability to receive timely and sufficient support. The importance of vendor support will vary for each organization depending on internal capabilities, but there will always be issues that only the vendor can resolve. Use this data to identify which vendors will be there when you need them.

Ease of Data Integration:

The ability to seamlessly integrate the solution with your other applications. Use this data to determine whether the product will cause headaches or make data integration easy.

Ease of Administration:

Administrative interfaces shouldn't be clunky or unintuitive. Use the data in this section to determine which vendors make administration easy so that your IT personnel can resolve issues and perform configurations efficiently and effectively.

Ease of Customization:



Out-of-the-box functionality often isn't enough, especially for niche or industry-specific software, and the reason you're buying rather than building is to save time and money in the first place. Don't get bogged down in a difficult customization; use the data in this section to make sure you can easily achieve the functionality you need for your particular situation.

Ease of Implementation:

Choosing the right software is only the first step. Successfully implementing the new solution is necessary in order to realize its full value and promote end user adoption. Use the data in this section to determine which software is easy to implement, and which may jeopardize your goals by causing trouble in this stage.

Vendor Capability Summary

This page summarizes user satisfaction with a variety of vendor capabilities regarding their product offering(s). Look for strong and consistent performance across the board when assembling your shortlist, and follow up on areas of concern during the evaluation and negotiation processes.

NET SCORE	83%	 Insightly CRM	VS	 Salesforce Starter	82%	NET SCORE
86%	<div style="width: 86%; height: 15px; background-color: #008000;"></div>	✓	Ease of Data Integration		84%	<div style="width: 84%; height: 15px; background-color: #666;"></div>
86%	<div style="width: 86%; height: 15px; background-color: #008000;"></div>	✓	Ease of Customization		85%	<div style="width: 85%; height: 15px; background-color: #666;"></div>
85%	<div style="width: 85%; height: 15px; background-color: #008000;"></div>	✓	Quality of Features		81%	<div style="width: 81%; height: 15px; background-color: #666;"></div>
84%	<div style="width: 84%; height: 15px; background-color: #008000;"></div>	✓	Product Strategy and Rate of Improvement		80%	<div style="width: 80%; height: 15px; background-color: #666;"></div>
84%	<div style="width: 84%; height: 15px; background-color: #008000;"></div>	✓	Ease of Implementation		81%	<div style="width: 81%; height: 15px; background-color: #666;"></div>
83%	<div style="width: 83%; height: 15px; background-color: #008000;"></div>	✓	Ease of Administration		77%	<div style="width: 77%; height: 15px; background-color: #666;"></div>
77%	<div style="width: 77%; height: 15px; background-color: #008000;"></div>	✓	Vendor Support		75%	<div style="width: 75%; height: 15px; background-color: #666;"></div>
100 80 60 40 20 0		BEST SCORE		BEST SCORE		0 20 40 60 80 100

Product Feature Summary

SoftwareReviews examines product features specific to the Customer Relationship Management - Small Business software category. Features have been chosen based on market relevancy and typical use within the category. Use this data to compare against your primary use case and identify relative strengths and weaknesses across your shortlisted vendors.

Account and Contact Management:

Customizable records with customer demographic information, account history, and billing information.

Activity and Workflow Management:

Text or code-based and visual workflow designers.

Analytics and Reporting:

Includes historical & real-time dashboard visualizations, detailed & summary reporting and easy data extraction for data analysis.

Collaboration:

Includes ability to view, share and direct work between co-workers in real or near real-time.

Customer Service Management:

Includes case and ticket management, automatic escalation rules, advanced resolution tools, multi-channel integration, and in-band response capabilities.

Lead Management:

Track and optimize prospective customers through lead generation, customer inquiry and capture, filtering, grading distribution, and contact/lead nurturing.

Marketing Management:

Multi-channel campaign management and analytics, budget tracking, click-to-lead capabilities, and social property management, keyword mining, and analytics.

Mobile:

Ability to support multiple devices, OSes and platforms using mobile optimized, HTML-based web access and/or native applications.

Quote Contract and Proposal:

Includes web portals, quoting capabilities, order tracking and fulfillment, and rapid deployment templates for e-commerce sites.

Sales Management:

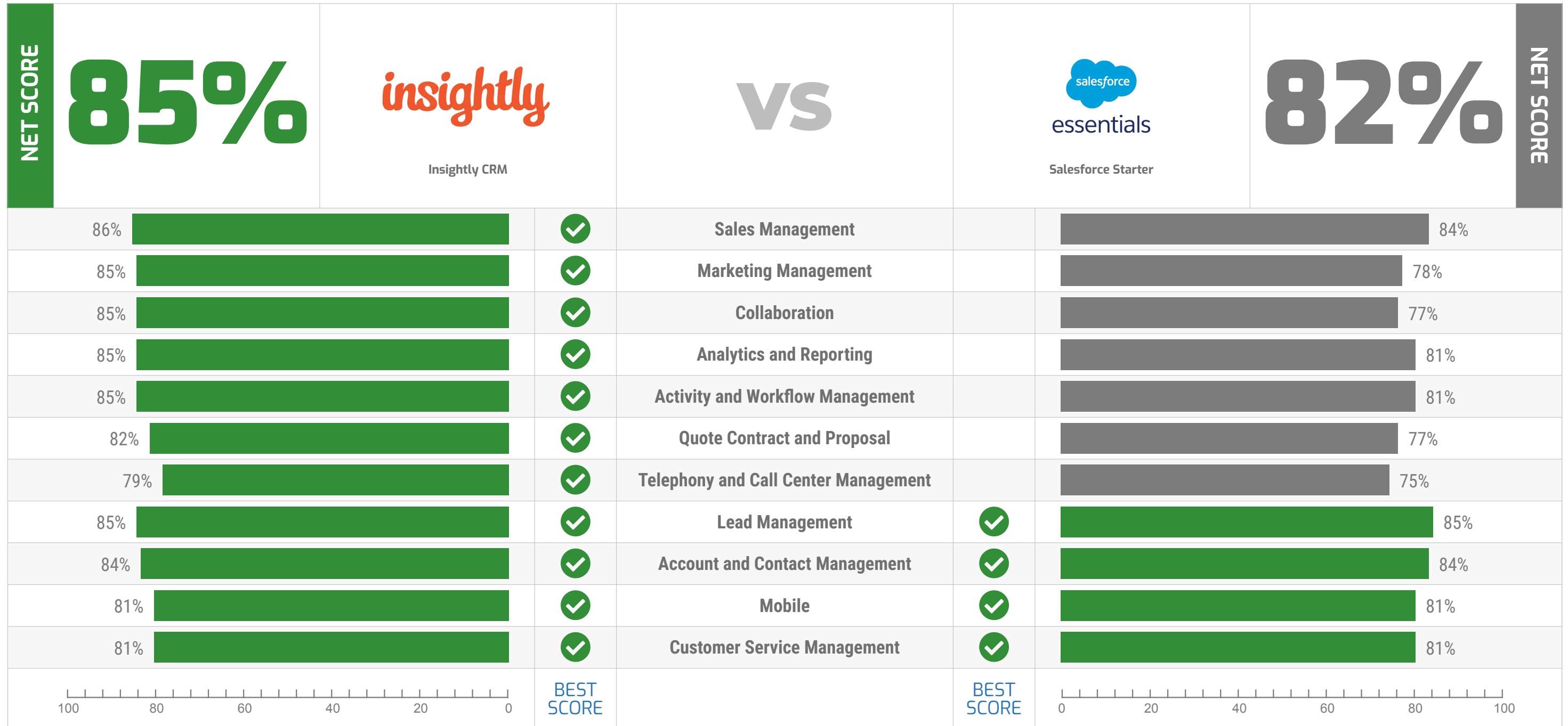
Lead gen, pipeline management, team & geography-based assignment. Compensation & contract management. Ability to pull customer data from the social cloud.

Telephony and Call Center Management:

Computer-telephony integration for bringing call info into the CRM suite. Advanced call recording, scripting, queuing, and Interactive Voice Response (IVR).

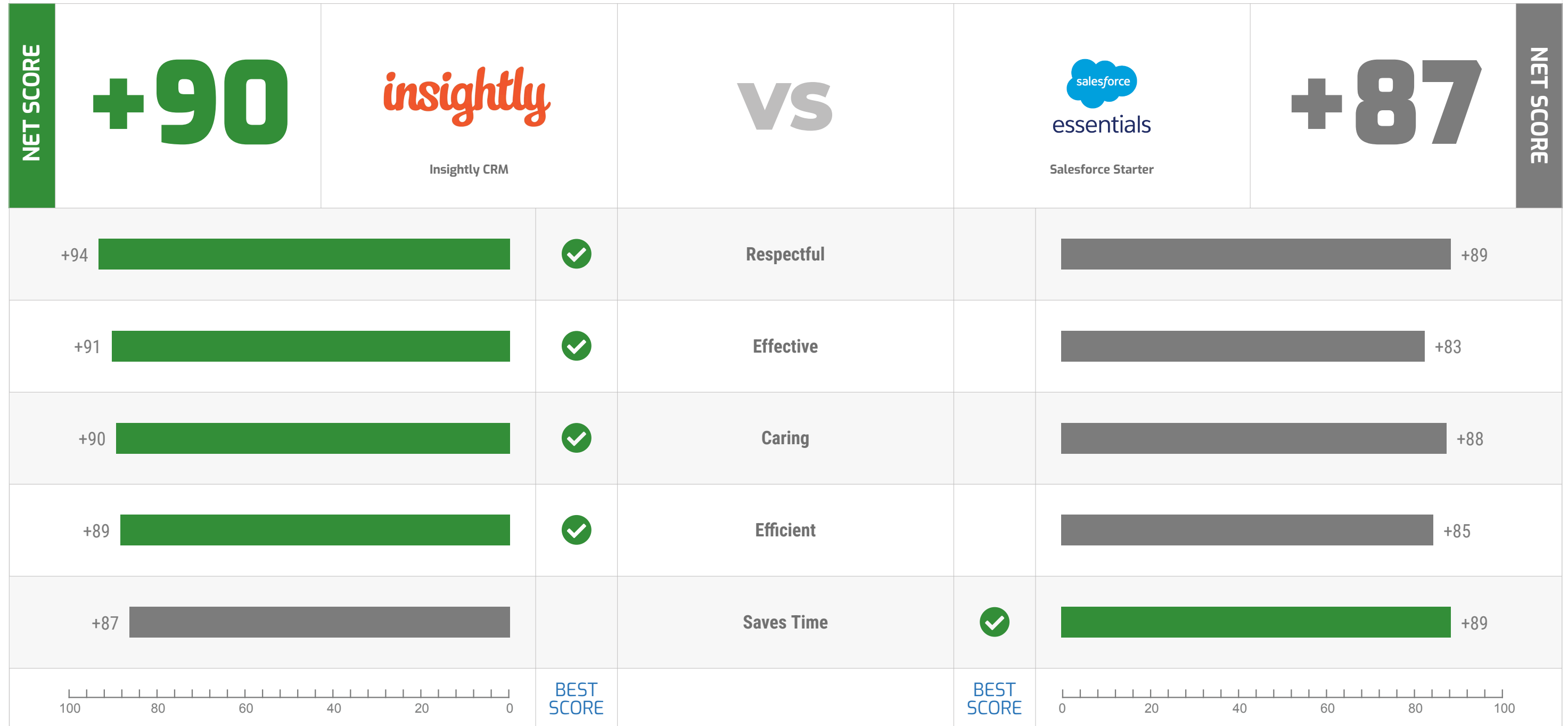
Product Feature Summary

This page summarizes user satisfaction with a variety of product features. While strong and consistent performance across the feature set is preferable, you may be willing to tolerate low scores on features that don't impact your primary use case or core objectives. Use this high-level data to help plan and structure your product evaluation.



Service Experience

Good service matters. The last thing you need is to be disrespected by your software vendor or to get bogged down by their ineptitude or neglect. This section displays data related to quality and effectiveness of service, so you can know whether you'll be treated well before and after you've made the purchase.



About SoftwareReviews

With practical advisory services and a data-driven approach, SoftwareReviews' mission is to improve the B2B software experience for all software buyers and providers.

Our pragmatic tools and detailed customer insights help software buyers maximize success with their technology decisions. We collect the most in-depth customer review data from both business and IT professionals to shorten the time to decision and action for software purchasers and improve overall buyer satisfaction.

Combining deep buyer knowledge and experience, SoftwareReviews' go-to-market practice helps technology providers better understand customer needs and accelerates planning and execution of go-to-market and product strategy.

SoftwareReviews is a division of Info-Tech Research Group with over two decades of research-based IT advice and technology implementation.

SoftwareReviews Methodology

SoftwareReviews collects in-depth, first-party feedback from verified end users about their customer experience with their top enterprise software providers. Quantitative and qualitative feedback data is collected via SoftwareReviews' proprietary online survey platform. The survey gathers over 130 data points on each product, allowing the end user to thoroughly evaluate their experiences over their full lifecycle using the software - from their selection experience through their purchase and service experience.

Every review is meticulously checked through a robust quality assurance process to ensure it is submitted by a real person with valid credentials for using the software. End user experience and sentiment measures revealing product feature fit, perceived vendor capabilities, business value drivers, and the quality of the vendor relationship are accessible at both a high level roll up and a more detailed drill down.

SoftwareReviews reports are available to download at [SoftwareReviews.com/categories](https://www.softwarereviews.com/categories).

This report is available free of charge for internal use only to assist with software evaluation and selection. Sharing, republishing, distributing, or otherwise copying any portion of this report without the express written consent of SoftwareReviews.com is strictly prohibited.

© 2024 SoftwareReviews.com. All rights reserved.