

TECH CHOICES



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On-Premise Sales Force Automation Scorecard Summary: SalesLogix

Key Findings From "The Forrester Wave™: On-Premise Sales Force Automation, Q4 2005"

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EXECUTIVE SUMMARY

While the SalesLogix product has some customer service and marketing functionality, its strength is in the sales force automation (SFA) functionality used by the majority of its 7,000-strong customer base. It emerged as a leader in our evaluation because it simplifies life for sales users and managers with best-in-class tools for managing contacts and accounts and strong reporting capabilities. On the downside, most customizations and custom reports require an administrator, meaning that business users typically have to wait on IT to get what they need.

SALESLOGIX: A LEADER IN SMALL BUSINESS AND MIDMARKET SFA

SalesLogix, part of the Sage Software family of products, serves the sales forces of more than 7,000 customers around the world, primarily in North America and Europe. It is backed by software giant Sage Software and its 7,000 channel partners.

Forrester evaluated SalesLogix's current offering and strategy for on-premise SFA against approximately 151 criteria (see Figure 1). The product is primarily geared toward sales reps with its intuitive user interface; fully functional offline client; and strong contact, account, and activity management features. This product is best suited for:

- **A distributed sales force working off laptops.** SalesLogix is particularly well suited for remote sales reps and field sales reps who spend the bulk of their time on the road and on airplanes. The product offers 100% of its functionality in disconnected mode and also provides strong support for real-time wireless access through mobile devices, including Pocket PC, BlackBerry, and Web-enabled phones. It also has strong Outlook integration, which saves reps the time and hassle of transferring emails into their SFA system — and also means more information makes it into the system.
- **Firms looking for standalone SFA.** Although SalesLogix provides some marketing and customer service automation, most of its customers use it for its core SFA functionality. The product works best in divisions of larger enterprises or small and medium-size businesses (SMBs) looking to improve sales effectiveness and gain insight into where deals stall and how reps are performing. The vendor has also improved its APIs in the past two years and has strong support for integrating with



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back-office systems, if firms need it. On the downside, the product wouldn't be a good fit for call center-centric organizations, and it has limited support for sales-related functionality, such as product hierarchies, quotes, and discounts.

To see how SalesLogix stacks up against seven other competitors, see the Forrester Wave™ evaluation of the on-premise SFA market.¹

Figure 1 SalesLogix Evaluation Overview


CURRENT OFFERING	
Product breadth	SalesLogix offers strong SFA functionality with some customer service and marketing capability. Parent Sage Software also has a range of ERP products in its portfolio, including Peachtree, Timberline, and MAS 90.
Deployment options	Supports hosted or on-premise but not on-demand.
Verticalization	Sage relies on partners to offer industry-specific editions. Partners offer a range of options, with a particularly heavy focus on real estate, financial services, and manufacturing.
Setup and configuration	SalesLogix allows firms to set up and configure the solution to meet most business needs, but the vendor has decided to restrict many of the features to administrators, including tasks like adding new content to the document library. The product has strong support for managing user groups with roles and access rights and for creating custom objects, tabs, and fields. Additionally, SalesLogix enables firms to automate sales processes and lead assignment through workflow. On the downside, many of these customizations require scripting rather than point-and-click, wizard-driven setup.
Sales management	SalesLogix scores well on sales management because of field-leading contact and account management capabilities, such as visual account hierarchies, merge records, built-in fuzzy matching for duplicate detection, and best-in-class record querying. The product also makes it easy to manage activities through group calendaring and color-coded to-do lists. On the downside, SalesLogix lacks product quotas and product-based forecasting and requires a third-party product for quoting, discounting, and approvals.
Sales analysis	SalesLogix ships with 70 Crystal reports and its own iReports tool and allows users with a report writer license to create additional custom reports, a feature typically reserved for administrators and power users. This means that reps and managers will usually have to rely on IT to generate new types of reports. Similarly, only administrators have the power to customize dashboards.
Usability	SalesLogix provides an intuitive user experience for sales reps and managers, but administrators must be able to write scripts since the product is thin on wizard-driven setup.
Access	SalesLogix has a field-leading offline client whose functionality matches that of the online client. Additionally, the vendor and its partner support real-time wireless access over Pocket PC, Web-enabled mobile phones, and BlackBerry.
Integration	SalesLogix customers benefit from integration options ranging from prebuilt integrations to Sage ERP products to APIs and developer tools that support custom one-off integrations.
Services	SalesLogix and its partners offer a range of online and custom on-site training options.
Cost	SalesLogix provides competitive pricing for the midmarket, including tiered offerings so that users only pay for what they need. Prices start at \$795 per user plus server license fees.

Source: Forrester Research, Inc.


Figure 1 SalesLogix Evaluation Overview (Cont.)

STRATEGY	
Product strategy and vision	SalesLogix's vision is to create a seamless migration path across its three CRM offerings: ACT!, Sage, and SalesLogix. Additionally, the vendor plans to enhance the SalesLogix architecture to improve analytics capabilities, scalability, and modularity.
Midmarket commitment	Sage focuses primarily on the SMB segment with many applications in its portfolio, including three CRM applications and several ERP applications.
Sales and implementation strategy	SalesLogix sells primarily through its worldwide channel partner network.
Technology partners	Approximately 40 technology partners, including eBRIDGE, Scribe, iAnywhere, QlikTech, and Vaultus. More than 75 add-on products available.
MARKET PRESENCE	
Installed base	SalesLogix boasts more than 7,000 customers across the globe. Its parent company, Sage Group, boasts millions of customers.
Financials	Sage Group boasts annual revenue of more than \$1.2 billion and one-year growth of 32.5%.
Number of employees	5,805 employees in 2003.
Global reach	SalesLogix has a customer base primarily in the Americas and Europe but has some customers in other geographies.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.



SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this vendor.

This detailed data and scores for this vendor are also available online through an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we narrow our final list to those presented here. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in this document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ SMBs continue to invest in SFA, and many seek an on-premise deployment rather than one of the increasingly popular software-as-a-service (SaaS) options. To assess the state of midmarket on-premise SFA applications and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top midmarket on-premise SFA vendors across 151 criteria. This evaluation complements the April 2005 Forrester Wave evaluation of the hosted SFA market. The result: Siebel, Onyx, and Pivotal are best suited for larger firms, while FrontRange and Maximizer fit the needs of small businesses. Included in this report is an interactive vendor comparison tool that provides detailed product evaluations and customizable rankings. See the November 18, 2005, Tech Choices "[The Forrester Wave™: On-Premise Sales Force Automation, Q4 2005](#)."

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