



CRM Service Providers

Table of Contents



1. About TresVista Financial Services
2. Popular CRM Service Providers
3. CRM Grid – Market Segmentation
4. Case Studies
5. Appendix

Disclaimer: This document is provided for information purposes only. The information is believed to be reliable, but TresVista does not warrant its completeness or accuracy. It should not be used, relied upon, or treated as a substitute for specific professional advice. Opinions, estimates, and assumptions constitute our judgment as of the date hereof and are subject to change without notice. This material is not intended as an offer or solicitation for the purchase or sale of any financial instrument. Additional information is available upon request. Images used in this document are for reference only and may not be reproduced, copied, transmitted or manipulated in any way.

About TresVista Financial Services



- High-end customized financial services and knowledge outsourcing provider
- Includes financial modeling, valuation analysis, portfolio management services, research, & analytics

- Global footprint, with clients across the US, Europe, Asia, and MENA region
- Offices in Mumbai, India and London, United Kingdom



- For Private Equity Funds, Asset Managers, Research Firms, Investment Banks, and Corporates
- By talented Associates & Analysts; managed by experienced Vice Presidents/Assistant Vice President

- Flexible staffing structure based on client requirements
- Project based assignments
- Annual contract option partners clients with dedicated resources
- Virtual Captive for clients requiring a large dedicated team



- Deliver best-in-class quality and financial expertise
- Enable clients to focus on their core competencies
- Enable cost savings



Popular CRM Service Providers

Popular CRM Service Providers

Summary

CRM Provider	Price ⁽¹⁾	User Rating (Out of 5)	Strengths ⁽²⁾	Weaknesses ⁽²⁾
 DealCloud	Freemium	Unrated	<ul style="list-style-type: none"> Designed specifically for investment firms Robust reporting and customized analytics Good integration with MS Office suite 	<ul style="list-style-type: none"> Requires a lot of processing power and memory of the server using the CRM
 insightly	\$0 - \$99 per user per month	3.8	<ul style="list-style-type: none"> One of the cheapest service providers Ideal for small businesses User friendly 	<ul style="list-style-type: none"> No information backup Rigid layout of CRM Weak report generation capability
 salesforce	\$25 - \$300 per user per month	4.1	<ul style="list-style-type: none"> Generation of customized reports and charts Ability to create multiple tracking points Ability to expand functionality 	<ul style="list-style-type: none"> Expensive Poor Outlook integration Complex customization tools for simple projects
 Microsoft Dynamics ^{CRM}	\$50 - \$85 per user per month	3.2	<ul style="list-style-type: none"> Integration available with other MS products (Especially Outlook) 	<ul style="list-style-type: none"> Difficult to integrate with third parties
 nimble	\$15 per user per month	4.6	<ul style="list-style-type: none"> Ability to integrate with various social platforms User friendly and smart features 	<ul style="list-style-type: none"> Poor integration with Gmail Less functionality in the mobile app

(1) Price is for the Sales CRM product

(2) User ratings, strengths and weaknesses are sourced from <https://www.g2crowd.com/>

Popular CRM Service Providers

Summary






CRM Provider	Price ⁽¹⁾	User Rating (Out of 5)	Strengths ⁽²⁾	Weaknesses ⁽²⁾
 Pipedrive	\$12 per user per month	4.5	<ul style="list-style-type: none"> • Timeline view helps in tracking progress at each stage of the sales process • Mail sync helps in keeping track of communication regarding each deal 	<ul style="list-style-type: none"> • Weak report generation capability • Outlook sync possible only via third party application
 Zoho Work · Online	\$12 - \$50 per user per month	3.6	<ul style="list-style-type: none"> • User friendly • Quick set up and cost effective • Good reporting features 	<ul style="list-style-type: none"> • Lack of integration with other products • Poor call center features
 PipelineDeals	\$24 - \$48 per user per month	4.4	<ul style="list-style-type: none"> • Easy-to-use interface • Good email tracking, templates, and deal tracking 	<ul style="list-style-type: none"> • Poor email marketing features and functionality • Limited scalability beyond a small business CRM
 Salesnet	\$25 - \$50 per user per month	4.4	<ul style="list-style-type: none"> • Ability to customize the process/workflow and report options • Good customer service 	<ul style="list-style-type: none"> • Poor email related functions • Poor compatibility with mobile app
 Contactually	\$35 - \$125 per user per month	4.6	<ul style="list-style-type: none"> • Ability to template replies and follow-ups • Integration with Gmail, Mailchimp, Bombbomb, and Zillow 	<ul style="list-style-type: none"> • Inferior search functionalities • Poor customer service

(1) Price is for the Sales CRM product

(2) User ratings, strengths and weaknesses are sourced from <https://www.g2crowd.com/>

Popular CRM Service Providers

Summary



CRM Provider	Price ⁽¹⁾	User Rating (Out of 5)	Strengths ⁽²⁾	Weaknesses ⁽²⁾
	\$25 - \$125 per user per month	4.1	<ul style="list-style-type: none"> Embedded directly into Microsoft outlook Simple interface, activity tracking, and import export functionality 	<ul style="list-style-type: none"> Customizing requires time and forethought Outlook Integration leads to performance slowdown
	\$149 - \$499 per month	4.3	<ul style="list-style-type: none"> Robust and versatile system Unlimited users 	<ul style="list-style-type: none"> Extensive training required Low storage memory Charges extra to train and set up
	\$10 - \$30 per user per month	4.4	<ul style="list-style-type: none"> Minimum training requirement User friendly 	<ul style="list-style-type: none"> Limited customizability Report generation is limited
	\$99 per user	4.9	<ul style="list-style-type: none"> Creating customizable reports Easier contact management Easy email integration 	<ul style="list-style-type: none"> No mobile app available Not compatible with Mac OS
	\$25 - \$50 per user per month	4.6	<ul style="list-style-type: none"> Customization capabilities using known languages like C# and JavaScript 	<ul style="list-style-type: none"> Marketing tools to create campaigns require some improvements

(1) Price is for the Sales CRM product

(2) User ratings, strengths and weaknesses are sourced from <https://www.g2crowd.com/>

Popular CRM Service Providers

Summary

CRM Provider	Price ⁽¹⁾	User Rating (Out of 5)	Strengths ⁽²⁾	Weaknesses ⁽²⁾
	Quote based differential pricing	Unrated	<ul style="list-style-type: none"> • Consolidating contact information • Integration capabilities with accounting provider • Specialized for financial institutions 	<ul style="list-style-type: none"> • Longer setup time as compared to other CRMs due to mass customization
	\$0 - \$75 per user per month	4.4	<ul style="list-style-type: none"> • Good search capabilities • Informative graphical representation of data • Automate frequently performed tasks 	<ul style="list-style-type: none"> • Limited customizability • Limited pre-set custom fields
	\$40 - \$150 per user per month	3.2	<ul style="list-style-type: none"> • Good customization capability • Good reporting capabilities 	<ul style="list-style-type: none"> • Poor user interface • Complicated processes for basic tasks
	\$200 per user per month	Unrated	<ul style="list-style-type: none"> • Specialized for financial institutions • User friendly and good reporting capabilities • Fully customizable 	<ul style="list-style-type: none"> • Initial set up takes a longer time compared to others
	\$100 - \$300 per user per month	3.3	<ul style="list-style-type: none"> • CRM On Demand's Reporting and Analytics 	<ul style="list-style-type: none"> • Poor integration facility • Inferior user interface as compared to other CRMs

(1) Price is for the Sales CRM product

(2) User ratings, strengths and weaknesses are sourced from <https://www.g2crowd.com/>

CRM Grid



Source: <https://www.g2crowd.com/>

Case Studies

TresVista has worked with Clients on various CRMs



Client Mandate:

Help a US based private equity client manage their deal flow providing customized templates and processes

Tasks Performed:

- Deal flow management
- Contact mapping
- Tracking meetings and events
- Weekly Calendar update
- Database management
- Contact management
- Creating custom email chains
- Uploading files and documents
- Managing contact/deal/organization information to client specifications

Client Mandate:

Maintain client's account by tracking deals, creating tasks, updating contacts information, mapping opportunities and organizations for a US based private equity firm

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking deal flow
- Tracking past/current/upcoming deals
- Exporting contact/deal/organizational information and sorting it to the client's need

Client Mandate:

Tracking of various deals, banks, limited partners, contacts, and tasks for a US based private equity firm

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking deal flow
- Tracking past/current/upcoming deals
- Monthly report generation

Client Mandate:

Send emails using outlook and maintain the database with updated tasks, contacts, emails, calendar entries and reminders for a Netherlands based corporate venture fund

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking events
- Creating custom email chain
- Uploading files and documents
- Exporting contact/deal/organization information and sorting to client's need



Appendix

Key Products / Services	Features	Pricing
Cloud Based CRM	Pipeline management, Document retention, Sponsor/intermediary coverage efforts, Portfolio management, Deal marketing, Firm calendars, Task assignment, Key performance indicator analytics, Cloud based CRM, Deal flow management	NA

Private Equity Cloud	Investment Banking	Corporate Development	Public Finance & Advisory	Leveraged Finance
<ul style="list-style-type: none"> • Gives control of investors, deals and investments • Finding and managing LPs, buyers, sellers, intermediaries and portfolio companies • Fundraising • Investor relations • Capital calls • Deal management • Intermediary management • Portfolio management 	<ul style="list-style-type: none"> • End-To-End Activity Tracking • Relationship Management • Sponsor Coverage • Deal Origination • Fee Estimation And Tracking • Industry Group Management • Targeted Buyers Lists 	<ul style="list-style-type: none"> • Deal Management • Project Management • Post-Merger Integration • Targeted Watchlist • Due Diligence 	<ul style="list-style-type: none"> • End-To-End Activity Tracking • Relationship Management • Sponsor Coverage • Deal Origination • Fee Estimation And Tracking • Industry Group Management • Targeted Investor Lists 	<ul style="list-style-type: none"> • Deal Sourcing • Sponsor And Intermediary Coverage • Portfolio Reporting • Fundraising • Investor Relations

DealCloud has various other products. For complete list please visit (<https://www.dealcloud.com>)



Key Products / Services	Features				Pricing
Sales	Contact management, lead management, reports and dashboards, sales forecasting, sales collaboration, email integration, workflow and approvals, territory management, files sync and share, inside sales console, sales performance management, mobile, partner management, opportunity management				\$25 - \$300 per user per month
Group \$25	Professional \$ 65	Enterprise \$125	Unlimited \$250	Performance \$300	
<ul style="list-style-type: none"> Account & contact management Opportunity tracking Lead scoring, routing, and assignment Task & event tracking Customisable reports & standard dashboards Mobile access, customisation, & administration Chatter — company social network Outlook side panel & sync Case management 	<p>All group features, plus</p> <ul style="list-style-type: none"> Campaigns Customisable dashboards Collaborative forecasts Products, quotes, & orders Mass email Role permissions Salesforce engage 	<p>All professional features, plus</p> <ul style="list-style-type: none"> Workflow & approval automation Report history tracking Enterprise territory management Profiles & page layouts Custom app development Integration via web service API Salesforce identity Salesforce private appexchange 	<p>All enterprise features, plus</p> <ul style="list-style-type: none"> Unlimited customisations Unlimited custom apps Multiple sandboxes Additional data storage 24/7 toll-free support Access to 100+ admin services Unlimited online training 	<p>Fully integrated sales and service platform, including all unlimited features, plus</p> <ul style="list-style-type: none"> Single console view for inside sales Access to new contacts & accounts Auto data cleansing Goals, coaching & rewards for teams Integrated knowledge base Live web chat Additional sandboxes Additional data storage 	

Key Products / Services	Features				Pricing
CRM	Lead management, contact management, calendaring and events, custom fields and filters, file sharing, web to lead & web to contact and following, linking between contacts, organizations, opportunities & projects, mass email and email templates, sales opportunities, integration with email, integrated project management				\$0 - \$99 per user per month
Free \$0	Basic \$12	Plus \$29	Professional \$49	Enterprise \$99	
<ul style="list-style-type: none"> Free upto 2 users Advanced reports (max 10) Email templates (5) Mass email (max send 10/day) 10 custom fields (2 per record) 2,500 records up to 200 MB storage 500 rows file import limit Online knowledge base & community Q&A 	<ul style="list-style-type: none"> Advanced reports (unlimited) Scheduled reports & smart alerts (max 5) Mobile app business card scanner (5 cards per user per month) Email templates (50) Mass email (max send 500/day) 50 custom fields (10 per record) 25k records 1GB storage 5,000 rows import limit Email support On-boarding sessions 	<p>All basic features, plus</p> <ul style="list-style-type: none"> Scheduled reports & smart alerts (max 25) Mobile app business card scanner (15 cards per user per month) Email templates (100) Mass email (max send 2,500 per day) 250 custom fields (50 per record) 100k records 10GB storage 25,000 rows import limit Priority email support 	<p>All plus pack features, plus</p> <ul style="list-style-type: none"> Scheduled reports & smart alerts (max 100) Mobile app business card scanner (25 cards per user per month) Email templates (unlimited) Mass email (max send 5,000 per day) 500 custom fields (100 per record) 250k records 100GB storage 50,000 rows import limit 	<p>All professional features, plus</p> <ul style="list-style-type: none"> Scheduled reports & smart alerts (max 250) Mobile app business card scanner (50 cards per user per month) Mass email (max send 10,000 per day) 1000 custom fields (200 per record) 500k records 250GB storage 50,000 rows import limit 	

Microsoft Dynamics CRM



Key Products / Services	Features	Pricing
Sales	Opportunity management, social selling, planning and management, content collaboration, mobile sales, sales intelligence	\$50 - \$85 per user per month

Professional (existing office 365 user) \$50	Professional \$65	Sales Productivity \$85
<p>Includes sales force automation, unified service desk & microsoft social engagement</p> <ul style="list-style-type: none"> • Social listening • Social media analytics • Workflows and approvals • Sales automation • Customer service automation • Unified service desk • Sales campaigns • Reports and personal dashboards • Integration via web services • Mobile access • Access to customizations and extensions • Minimum 5 seat purchase requirement 	<p>Includes sales force automation, unified service desk & microsoft social engagement</p> <ul style="list-style-type: none"> • Social listening • Social media analytics • Workflows and approvals • Sales automation • Customer service automation • Unified service desk • Sales campaigns • Reports and personal dashboards • Integration via web services • Mobile access • Access to customizations and extensions • Minimum five-seat purchase requirement for listed CRM pricing 	<p>Includes microsoft dynamics crm professional & office 365 enterprise e5</p> <ul style="list-style-type: none"> • Sales productivity includes: • Microsoft dynamics CRM online professional • Office suite 2016 • Online conferencing • Instant messaging and skype connectivity • Cloud-based call management • PSTN conferencing (in select geographies) • Advanced email and calendars • Advanced security • Analytics tools • Mobility

Key Products / Services	Features	Pricing	
CRM	Visitor tracking, lead management, contact management, account management, sales collateral, web forms, workflow automation, marketing automation, opportunity management, role-based security, sales reports & dashboards, advanced CRM analytics, sales tracking, sales performance management, territory management, sales forecasting, custom functions, developer API	\$12 - \$50 per user per month	
Standard \$12	Professional \$20	Enterprise \$35	CRM Plus \$50
<ul style="list-style-type: none"> Sales forecasting Reports and dashboards Document library Roles and profiles Mass email Call center connectors 100,000 records 	All standard features, plus <ul style="list-style-type: none"> Email integration Social CRM Google adwords integration Workflow automation Inventory management Macros Unlimited records 	All professional features, plus <ul style="list-style-type: none"> Territory management Custom modules Custom applications Custom buttons Workflow approval processes Time-based actions Multiple currencies 	<ul style="list-style-type: none"> Email marketing Visitor tracking Proactive chat Social media marketing Sales force automation Sales tracking Social selling Sales presentations Customer service management Project management Integration with google adwords Advanced CRM analytics Key performance indicators Territory management

Key Products / Services	Features	Pricing
CRM	Sales acceleration, deal tracking, lead management, contact management, activity tracking, mobile CRM, data importing, custom list views, sales force management, sales goals, account customization, email integration, automations, integrations, sales pipeline management	\$24 - \$48 per user per month

Standard \$24

- Sales pipeline management
- Activity & sales reporting
- Google & outlook integrations
- Unlimited leads, contacts, deals & tasks
- Unlimited document storage
- Dynamic custom fields
- Saved searches
- Amazing customer support
- Bank-quality security
- Free iPhone and android apps
- Open api for developers
- Company management
- Integrations

Accelerator \$48

- All standard features, plus
- Integrated email inbox
 - Email automation & acceleration
 - Trackable email campaigns
 - Email templates & analytics
 - Unlimited customizable fields
 - Task & notification automation

Key Products / Services	Features	Pricing
CRM	Lead management, opportunity management, contact management, account management, dashboard management, reports, email marketing, mobile CRM, document library, Microsoft office integration, campaign management, social media integration, process builder, configurable web forms, integration links, user & data configuration, multi-tenant, data architecture, isolation options, session timeout & tracking	\$25 - \$50 per user per month
Express \$25	Professional \$50	Enterprise Customised Pricing
<ul style="list-style-type: none"> • Configurable nomenclature • Contacts & accounts management • Custom fields • Dashboards and reports • Data import wizard • Email marketing platform • Help desk • Leads and opportunity management • Mobile CRM • Process builder with smart forms • Real-time pipeline & accurate forecasting 	<p>All express features, plus</p> <ul style="list-style-type: none"> • Enhanced email marketing platform • Microsoft office add-ins (outlook, word and excel) • Web services API • Configurable HTML for web forms • Integration links • Help desk phone support 	<p>All professional features, plus</p> <ul style="list-style-type: none"> • Hosted applications • Dedicated support • Custom functionality • Enhanced security options including data isolation

Contactually



Key Products / Services	Features	Pricing
CRM	Database management, network management, contact management, mass messaging, customizable programs, automated business processes, content libraries, pipeline management, team management, assignment, filtering & bulk change controls, mobile CRM	\$35 - \$125 per month per user

Basic \$35	Professional \$59	Enterprise \$125
<ul style="list-style-type: none"> • Connect unlimited email accounts • Follow-up reminders • Social network integration • Bulk messaging (up to 50 per day) • Various app integrations 	<p>All basic features, plus</p> <ul style="list-style-type: none"> • Customizable email templates • Team contact sharing • Bulk messaging (up to 300 per day) • Article + content sharing • Programs for scheduled workflows • Pipelines for sales tracking • Introductions • Introduction templates 	<p>All professional features, plus</p> <ul style="list-style-type: none"> • Advanced permissions • Custom integrations • Audit logging

Key Products / Services	Features	Pricing
CRM	Tracking campaign metrics, sales reports, and dashboards from inside Microsoft Outlook, Sales pipeline management, sales automation, mobile CRM, reports and analytics, integrations and pre-packed templates for different industries	\$25 - \$125 per user per month

Contact Manager \$25	Team \$55	Enterprise \$75	Ultimate \$125
<p>Licensing: 2+ users</p> <ul style="list-style-type: none"> • Company and contact manager • Outlook contact syncing • Email linking • Sales automation • Email tracking and sharing • Quick installation and implementation (2 hours) 	<p>Licensing: 4+ users</p> <p>All contact manager features, plus</p> <ul style="list-style-type: none"> • Sales pipeline management • Opportunity & company reporting • Sales automation • Sales activity tracking/reporting • CRM analytics: visual dashboard • Customizable dashboards • Mobile browser and iphone apps • 400+ integration options • Role & department based access control, management & data-sharing • Email tracking and sharing • Cloud and on-premise hosting 	<p>Licensing: 4+ users</p> <p>All team features, plus</p> <ul style="list-style-type: none"> • Unlimited departments • Department specific templates, fields, and forms • Data and record sharing access management across departments • Automated notifications with prophet instant 	<p>Licensing: 10+ users</p> <p>All ultimate features, plus</p> <ul style="list-style-type: none"> • API toolkit access • Up to 10 hours data integration services • Gold level technical support (includes priority response) • Premium implementation package (up to 20 hours professional services)

GreenRope



Key Products / Services	Features						Pricing
CRM	Marketing automation, email marketing, event management, calendar booking, websites and analytics, social network marketing, project management, SMS/MMS/Call Management, surveys, tracking and stats, templates, advanced marketing tools, social collaboration, CRM Mobile application, lead capture forms, lead scoring and predictive analytics						\$149-\$499 per month (plus account setup charges)
Starter \$149	Pro \$169	Premium \$199	Powerhouse \$249	Magnificent \$299	Supreme \$449	Ultimate \$499	
<ul style="list-style-type: none"> • 1,000 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 3,000 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 5,000 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 7,500 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 10,000 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 25,000 contacts • Unlimited users • Unlimited emails 	<ul style="list-style-type: none"> • 50,000 contacts • Unlimited users • Unlimited emails 	
Standard Account Setup \$399				Premium Account Setup \$499			
<ul style="list-style-type: none"> • Implementation/training form and calendar to schedule sessions within 30 days at customer specified time • Three (3) hours of dedicated one-on-one training with a greenrope on-boarding manager • A custom implementation guide custom designed specifically for the customers business • Data analysis and import assistance • Special continued training pricing at \$149/2 hrs once the initial training is completed 				<ul style="list-style-type: none"> • Implementation/training form and calendar to schedule sessions within 30 days at customer specified time • Three (3) hours of dedicated one-on-one training with a greenrope on-boarding manager • A custom implementation guide custom designed specifically for the customers business • Data analysis and import assistance • Special continued training at \$149/2 hrs once initial training is completed • One (1) hour with a marketing consultant • One (1) hour of strategic implementation with an on-boarding manager 			

<https://www.greenrope.com/>

All prices are for per month (Except one time account setup charges)

BIGContacts



Key Products / Services	Features	Pricing
CRM	Revenue opportunities, pipeline management, email marketing, sales tracking , marketing automation, sales reports, sales opportunities, notes, calls, meetings, tasks, files, photos, along with all email communication, PC, Mobile, tablet support	\$10 - \$30 per user per month

Big \$10	Bigger \$20	Biggest \$30
<ul style="list-style-type: none"> • Optional annual subscription - \$5 • Total contacts – 1,000 • Total file storage – 2GB • Contact management module 	<ul style="list-style-type: none"> • Optional annual subscription - \$15 • Total contacts – 10,000 • Total file storage – 10GB • Contact management module • Email integration • Sales tracking module • Auto reminders & alerts • Quickbooks online sync – contact sync only 	<ul style="list-style-type: none"> • Optional annual subscription - \$25 • Total contacts – 50,000 • Total file storage – 50GB • Contact management module • Email integration • Sales tracking module • Auto reminders & alerts • Quickbooks online sync – contact & transaction sync • Bigbox (email inbox) • Teamchat (instant messaging) • Google calendar sync • Outlook synchronization • Social media tracking • API access

Key Products / Services	Features	Pricing
Sales	360° customer view, collaboration tools, business process management, lead management, opportunity management, orders and invoices, field sales management, sales forecasting, contract management, product management, document flow automation, project management, mobile sales, knowledge management, synchronization and integration, system designer	\$25 - \$50 per user per month

Team \$25	Commerce \$30	Enterprise \$50
<ul style="list-style-type: none"> • Opportunity management • Out-of-the-box process for large sales • Product and services 	<ul style="list-style-type: none"> • Orders and invoices • Products and services • Product catalogue management 	<ul style="list-style-type: none"> • Opportunity management • Out-of-the-box process for large sales • Orders and invoices • Sales forecasting • Contract management • Products and services • Product catalogue management • Project management

Oracle Cloud



Key Products / Services	Features	Pricing
Sales	Sales force automation, sales performance management, sales analytics and forecasting, integration and extensibility, social collaboration, partner relationship management	\$100 - \$300 per user per month

Standard \$100	Enterprise \$200	Premium \$300
<ul style="list-style-type: none"> • Core sales force automation¹ • Oracle sales cloud mobile app • Oracle sales cloud call report app • Sales analytics² • Sales forecasting • Oracle social network • Oracle sales cloud for outlook • Sales catalog • Territory management • Customer data management³ • Configuration and customization toolset⁴ • One test environment 	<p>All standard features, plus</p> <ul style="list-style-type: none"> • Oracle mobilitytics • Mobile app designer • Campaigns • Quota management • Incentive compensation⁵ • Oracle sales cloud for IBM notes • Sales predictor • Presentation sharing with sales lightbox 	<p>All enterprise features, plus</p> <ul style="list-style-type: none"> • Whitespace analysis • Oracle voice • Enterprise contracts

https://cloud.oracle.com/en_US/customer-experience-cloud

All prices are for per user per month (unless stated otherwise)

Key Products / Services	Features	Pricing	
CRM	Contact management, opportunities, deals, cases, projects, tags & segmentation, email campaigns, custom logo, client portal, calendar, tasks, automated tasks reporting, special permissions, enhanced security, social feeds, custom fields, native mobile app, alerts, product catalog, social advertising, billing/ invoicing, lead management and lead tracking	\$0 - \$74.99 per user per month	
Free \$0	Awesome \$14.99	Pro \$39.99	Max \$74.99
<ul style="list-style-type: none"> • Unlimited users • Unlimited contacts • 750 records • Up to 10 custom fields • Unlimited published products • Support- tickets • Storage 250MB 	<ul style="list-style-type: none"> • Unlimited users • Unlimited contacts • 10,000 records • Up to 30 custom fields • Unlimited published products • Support- tickets + chat • Quotes • Payments • Premium integrations • Data export • Email integrations • Storage 2GB 	<p>All awesome features, plus</p> <ul style="list-style-type: none"> • 30,000 records • Up to 60 custom fields • Unlimited published products • Support- tickets + chat • Mass email • Tasks automation • Analytics • Promoted products • Limited permissions users • Web forms • Storage 6GB 	<ul style="list-style-type: none"> • Unlimited users • Unlimited contacts • Unlimited records • Up to 60 custom fields • Unlimited published products • Support- tickets + chat • Mass email • Tasks automation • Analytics • Promoted products • Limited permissions users • Web forms • Storage 12GB • Additional storage \$5/GB/month

Sugar CRM



Key Products / Services	Features	Pricing
SugarUX (CRM)	Sales automation and forecasting, marketing lead management, support automation, call center automation, reporting & dashboards, sugarcrm mobile, unlimited online support, revenue line item level opportunity tracking forecasting, product level quotes, advanced workflow, role-based views, 100 concurrent customer self-service portal users, sql-based reporting access, support for oracle and DB2 (on-site)	\$40 - \$150 per user per month
Professional \$40	Enterprise \$65	Ultimate \$150
<p>Minimum 10 user license</p> <ul style="list-style-type: none"> • Sales automation and forecasting • Marketing lead management • Support automation • Call center automation • Reporting & dashboards • Sugarcrm mobile • Cloud or on-premise deployment • 15GB storage • Unlimited studio customizations • Unlimited online support • Support for mysql and SQL server (on-site) 	<p>Minimum 10 user license</p> <p>All professional features, plus</p> <ul style="list-style-type: none"> • Revenue line item level opportunity tracking forecasting • Product level quotes • Advanced workflow • Role-based views • 100 concurrent customer self-service portal users • Sql-based reporting access • Support for oracle and DB2 (on-site) • 12x5 (hours/days) email and phone support • 60GB storage 	<p>Minimum 10 user license</p> <p>All enterprise features, plus</p> <ul style="list-style-type: none"> • 24x7 support • Assigned technical account manager • 250GB storage • Up to 5 sandbox instances (on-demand)

<https://www.sugarcrm.com/>

All prices are for per user per month (unless stated otherwise)

Key Products / Services	Features	Pricing		
CRM	Company profiles, deal tracking, intermediary tracking, deal management, intermediary metrics, deal funnel, debt financing, portfolio management, business unit reporting, data access & permissions, compliance, buyer/seller matching, create fund profile, buyer/seller matching, search deals, download contacts, LP portal for fund marketing and investor relations, combining a virtual data room with a CRM for investor relations	~\$200 per user per month		
Private Equity	M&A Cloud	Asset Management Cloud	Corporate Development Cloud	Venture Capital Cloud
<ul style="list-style-type: none"> • End-To-End Activity Tracking • Relationship Management • Institutional Knowledge • Real-Time Intermediary Coverage • Configurable Deal Execution • Aggregate Deal Management • Fundraising And IR • Portfolio Monitoring And Reporting 	<ul style="list-style-type: none"> • Specially built for deal origination and execution processes • Manage all activities and records associated with prospects and buyers • Manage marketing and communications initiatives • Manage all aspects of business development 	<ul style="list-style-type: none"> • Detailed workflows needed to manage client holdings across different asset classes such as mutual funds, private equity, credit and real estate funds, as well as custodians • Manage sales and distribution through various channels • Provides powerful analytical tools to clients and management • Automating the capture of information needed for regulatory compliance 	<ul style="list-style-type: none"> • Full control of deals and investments • Find and manage buyers, sellers, intermediaries and portfolio companies • Company profiles • Deal tracking • Intermediary tracking • Deal management • Intermediary metrics • Deal funnel & debt financing • Portfolio management • Business unit reporting • Data access & permissions • Buyer/seller matching 	<ul style="list-style-type: none"> • Full control of investors, deals and investments • Manage LP's, investments, intermediaries and portfolio companies • Fundraising • Investor relations • Capital calls • Deal management • Intermediary management • Portfolio management

Navatar has different CRM platforms catering to different segments, for complete list of products visit <http://www.navatargroup.com/>

Single Price Package CRMs

				
Freemium	\$15 per user per month	\$12 per user per month	\$99 per user	Quote based differential pricing
<ul style="list-style-type: none"> • Pipeline management • Document retention • Sponsor/intermediary coverage efforts • Portfolio management • Deal marketing • Firm calendars • Task assignment • Key performance indicator analytics • Cloud based CRM • Deal flow management 	<ul style="list-style-type: none"> • Contact management • Social channel management • Integrated message management • Sales automation tools • Activity management 	<ul style="list-style-type: none"> • Pipeline view • Lead management • Contact management • Calendaring and events • Automatic address book • Notes and comments • Lightning fast search • Custom fields and filters • File sharing • Notification • Linking between contacts, organizations & deals • Integration with email (including BCC) • Integrated project management • Mobile app • Multi-language, sales statistics 	<ul style="list-style-type: none"> • Contact management • Custom fields • Relationship management • Sharing & collaboration • Leads & opportunities • Search functionality • Document archiving • Task management • Email management • Dashboard management • Outlook import • Calendar management • CSV import • Sip softphone • Recording management • Email & calendar editor • Social media integration 	<ul style="list-style-type: none"> • Investor relations • Deal tracking • Contact management • Investor portal • Integrated fund-raising platform • Deal pipeline management • Outlook integration