

In the May 2006 issue of *Customer Service Newsletter*, ISM Inc. offers advice on selecting CRM software for a small or medium-sized business. Here it offers a checklist for comparing business functionality when looking at various programs, and a functionality comparison for three of the leading CRM software programs available.

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CRM BUSINESS FUNCTIONS CHECKLIST

Product:			
Business Functions	Yes	No	Description
Contact Management			
<i>Contact profile</i>			
<i>Contact history</i>			
Account Management			
<i>Account information</i>			
<i>Activity management (e.g., outstanding, completed)</i>			
<i>Order history</i>			
Sales Management			
<i>Opportunity management</i>			
<i>Sales cycle analysis/sales metrics</i>			
<i>Territory alignment/assignment</i>			
<i>Activity reporting</i>			
Time Management Tools			
<i>Calendar (i.e., native or 3rd party such as MS-Outlook)</i>			
<i>Email</i>			
<i>Notes</i>			
<i>Transaction log/audit trail (e.g., time and date stamp)</i>			
Customer Service			
<i>Incident assignment</i>			
<i>Incident escalation</i>			
<i>Incident reporting</i>			
<i>Order management (e.g., status, delivery, location, tracking)</i>			

Business Functions	Yes	No	Description
Marketing			
<i>Campaign management (e.g., campaign creation & media tracking)</i>			
<i>Marketing (media) encyclopedia (e.g., document repository)</i>			
Lead Management			
<i>Qualification/Prioritization</i>			
<i>Routing</i>			
<i>Tracking</i>			
Business Analytics			
<i>Pre-defined reports</i>			
<i>User-defined reporting</i>			
<i>Pre-defined queries</i>			
<i>Ad hoc query generator (query by example)</i>			
<i>Automatic roll-up/drill down capabilities</i>			
<i>Forecasting/planning tools</i>			

CRM SOFTWARE FUNCTIONALITY COMPARISON

<u>Criteria</u>	<u>Siebel CRM OnDemand v. 9.0</u>	<u>Salesforce.com</u>	<u>StavinFront CRM v. 9.3</u>
Contact Management	●	●	●
Account Management	●	●	●
Sales Management	●	●	●
Time Management	●	●	●
Customer Contact Center	○	○	○
Customer Service	●	●	●
Field Service	N/A	○	●
Telemarketing/Telesales	●	○	●
Marketing	○	○	●
Lead Management	●	●	●
PRM - Partner Relationship Management	●	●	○
Knowledge Management	○	●	●
Business Analytics	●	●	●
e-Business	○	○	○
Supply Chain Management	N/A	N/A	N/A
Project Management	○	○	N/A
ERM - Employee Relationship Management	N/A	N/A	N/A
Configuration	●	●	●
Customization	●	●	●
Data Conversion	●	●	●
Real Time Features	●	●	●
User Friendliness/Support	●	●	●

Key:

● - Strong

● - Good

○ - Limited

N/A - Not Available