

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Product	ACCPAC CRM	ACT! 2005 and ACT! 2005 Premium for Workgroups	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Vendor	Best Software, ACCPAC Division	Best Software	Epicor Software	Commence Corporation	E.piphany Inc.
Version	5.7	7	8.2	3	6.5
Release date (mmm-yy)	Dec-04 (planned; subject to change)	Aug-04	Mar-04	Dec-03	Nov-03
Contact					
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Website	www.accpac.com	www.act.com	www.epicor.com	www.commence.com	www.epiphany.com
Cost (Canadian dollars) for typical implementation					Average costs begin around \$315,000 (US\$250,000) including software and implementation
Licence based		ACT! 2005 (\$229.99 U.S. per user; ideal for 1 to 10 users). ACT! 2005 Premium for Workgroups (\$399.99 per user; for up to 50 users)		Licensed or hosted	
Average cost per user	\$1,495	\$275	\$2,950	\$495	
Average number of users	15	1	20		
Average cost	\$22,425	\$275	\$59,000		
Average Implementation costs / licence costs	1.00		0.25		
Average implementation costs	\$22,425		\$14,750		
Average infrastructure upgrade costs / licence costs			0.25		
Average infrastructure upgrade costs	\$0		\$3,688		
Total	\$44,850		\$77,438		
ASP (Application Service Provider) based					

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Average setup or fixed fees	\$0				
Average annual fee / user	\$800				
Average number of users	10				
Average fees - year one	\$8,000				
Average implementation costs / average fees - year one	0.50				
Average implementation costs	\$4,000				
Average infrastructure upgrade costs / average fees - year one	0.25				
Average infrastructure upgrade costs	\$1,000				
Total	\$13,000				
Applications (Yes/No/Partly/Third party/By next year/Customization)					
Contact management	Yes	Yes	Yes	Yes	Yes
Sales force automation	Yes	Yes	Yes	Yes	Yes
Marketing automation	Yes	Yes	Yes	Yes	Yes
Services management	Yes	Third party	Yes	Yes	No
Call centre	Yes	Third party	Yes	Yes	Yes
Knowledge management	Yes	Third party	Yes	Yes	Yes
Business intelligence	Yes	Third party	Yes	Partly	Yes
Profile					
World head office location	Pleasanton, CA	Best Software US headquarters: 56 Technology Drive Irvine, CA 92618-2301	Irvine, CA	New Jersey, USA	San Mateo, CA
Canadian head office location	Richmond, BC	2600 Skymark Avenue Mississauga, ON, L4W 5B2	Oalville		Mississauga, ON
No. of customers - worldwide - all products	500,000+	Sage Group plc (parent company) supports more than 4.3 million customers worldwide	20,000	12,000	475
No. of customers - worldwide - this product		More than 2M registered users on the previous platform	5,000	12,000	
No. of customers - Canada - all products			500	300	
No. of customers - Canada - this product			200	300	
Revenue 2003 - CAD - all products	\$106 M		\$210M		\$121.2M
Revenue 2003 - CAD - this product					
Revenue 2002 - CAD - all products			\$194M		\$105.7M
Revenue 2002 - CAD - this product					

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Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Target market					
Average revenue/customer (CAD)	\$10M to \$250M				
Average no. of employees/customer	50 to 2,000	1- 10 43% 11 – 100 36% 101 – 1000 14% 1001 + 7%		15-50	
Industry classification based on the North American Industry Classification System (NAICS) - See http://www.naics.com/info.htm#Structure for more about NAICS (Approximate % of implementations)					
11 Agriculture, forestry, fishing and hunting		2%	2%		
21 Mining	1%		2%		
22 Utilities	3%	2%	5%		
23 Construction	4%	10%	2%		
31-33 Manufacturing	12%	14%	2%		
42 Wholesale trade	11%	10%	2%		
44-45 Retail trade	8%	19%	5%		
48-49 Transportation and warehousing	10%	2%	5%		
51 Information	10%		20%		
52 Finance and insurance	11%	10%	15%		
53 Real estate and rental and leasing	3%	3%	5%		
54 Professional, scientific, and technical services	5%		15%		
55 Management of companies and enterprises	10%		10%		
56 Administrative and support and waste management and remediation services		10%	1%		
61 Education services	2%	3%	1%		
62 Health care and social assistance	4%	9%	5%		
71 Arts, entertainment, and recreation	1%	6%	1%		
72 Accommodation and food services	2%		1%		
81 Other services (except public administration)					
92 Public administration	3%		1%		
Total	100%	100%	100%		
Technology					
Database (approximate % of implementations)					

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Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Microsoft SQL Server	65%	100%	100%	100%	Yes
Oracle	20%		None		Yes
Pervasive SQL	0%		None		
IBM DB2	10%		None		Yes
Sybase	5%		None		
Informix	0%		None		
Access	0%		None		
Btrieve	0%		None		
Proprietary	0%		None	100%	
FoxPro	0%		None		
Progress	0%		None		
Other	0%				
Total	100%	100%	100%	200%	
Networks supported (approximate % of implementations)					
Microsoft	80%	100%	100%	100%	Yes
Linux	14%				In late 2004
Unix	5%				Yes
AIX	0%				Yes
Novell Netware	0%				
IBM AS/400 (OS/400)	1%				
Other	0%				HP-UX
Total	100%	100%	100%	100%	
Development tools used to build application	Java, Javascript, Delphi, C	Visual Studio .NET, using C#	VB / Visual Studio .Net		Mostly Java and J2EE; some pieces of the suite (for example Interaction Advisor and our outbound e- mail engine) are built in C++ for performance reasons but are accessed by the rest of the suite through Java interfaces
Integration to ERP or accounting systems - which?	ACCPAC Advantage Series, ACCPAC Pro Series	Accounting links to Peachtree, MAS 90 and Quickbooks are available	Epicor	various via ODBC	Any

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
% of application available from browser not including use of Citrix or Terminal Services	100%	ACT! for Web product available soon	100%		100%
Expected date for web-based version	winter/spring 2005	ACT! 2005 for Web available in 2005	Currently Released	Jun-05	Available today
Available from Application Service Provider	Yes		No	No	Yes
Approx. no. of implementations	600		Canada 100		3 dozen
Features					
Business Intelligence					
Analyse performance related to CRM	Yes	Third party	Yes	Yes	Yes
KPI's	Partly	Third party	Yes	Yes	Yes
Forecasts of customer behaviour	Yes	Third party	Yes	Partly	Yes
Contact management					
Multiple criteria used to create list for mail merge	Yes	Yes	Yes	Yes	Yes
Mass update noting all clients that were updated	Yes	Yes	Yes	Yes	Yes
Multiple addresses per contact	Yes	Yes	Yes	Yes	Yes
Identify potential duplicates for new contact	Yes	Yes	Yes	Yes	Customization
Duplicate merge process	Yes	Yes	Yes	Yes	Customization
Audit trail	Yes	Yes	Yes	Yes	Yes
Date and person making change	Yes	Yes	Yes	By next year	Yes
Full audit trail with what was changed	Yes	Yes	Yes	By next year	Yes
Unlimited follow-ups with contact	Yes	Yes	Yes		Yes
Unlimited notes per contact with date/time stamp	Yes	Yes	Yes	Yes	Yes
Search for embedded text in notes	Partly	Yes	Yes	Yes	Yes
Two steps to delete contact	Yes	Yes	Yes	Yes	Yes
Contact hierarchy	Yes	Yes	Yes	Yes	Yes
2 levels - organization and employees - EG might want to view all lawyers in a specified legal firm	Yes	Yes	Yes	Yes	Yes
Default address information from organization - but can override	Yes	Yes	Yes	Yes	Yes
3 levels - organization / location / employee	Yes	Yes	Yes	Yes	Yes
French version	Yes	By next year	Yes	Yes	Customization
Screens	Yes	By next year	Yes	Yes	Customization
Reports	Yes	By next year	Yes	Yes	Customization

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Documentation	No	By next year	Yes	No	No
Integration					
XML enabled	Yes	Partly	Yes	Yes	Yes
Import processor	Yes	Yes	Yes	Yes	Yes
API (Application Programming Interface)	Yes	Yes	Yes	Yes	Yes
Marketing automation	Yes	Yes	Yes	Yes	Yes
Record temporary contact information and later convert to prospect	Yes	Yes	Yes	Yes	Yes
Permission based	Yes	Yes	Yes	Yes	Yes
Scripts for direct marketing	Yes	No	Yes	Yes	Yes
Use Microsoft Exchange Server for e-mail blasts	Yes	Yes	Yes	Yes	
Use a SMTP Server for e-mail blasts	Yes	Yes	Yes	Yes	Yes
E-mail history stored in CRM database	Yes	Yes	Yes	Yes	Yes
Multiple relationships for each contact	Yes	Yes	Yes	Yes	Yes
Primary relationship	Yes	Yes	Yes	Yes	Yes
Four secondary relationships	Yes	Yes	Yes	Yes	Yes
Ten secondary relationships	Yes	Yes	Yes	Yes	Yes
Each relationship is a contact (set-up once)	Yes	Yes	Yes	Yes	Yes
Online					
E-commerce - orders, check status...	Partly	No	Yes	Partly	Third party
Self Serve - Access product support information...	Yes	No	Yes	Yes	Yes
Campaign management - prospects respond online	Yes	No	Yes	Yes	Yes
Register for seminars	Yes	No	Yes	Yes	Customization
Sales force automation	Yes	Yes	Yes	Yes	Yes
Track status of opportunity	Yes	Yes	Yes	Yes	Yes
Proposal generation	Partly	Yes	Yes	Partly	Yes
Security		Yes			
By employee	Yes	Yes	Yes	Yes	Yes
By role	Yes	Yes	Yes	Yes	Yes
Services management	Yes	No	Yes	Yes	No
Maintain contract	Yes	No	Yes	Yes	No
Scheduling	Yes	No	Yes	Yes	No
Dispatching	Third party	No	Yes	Yes	No
Synchronization					
Palm Pilot	Yes	Yes	Yes	Yes	Third party
Windows CE	Yes	Yes	Yes	No	Third party
Microsoft Outlook	Yes	Yes	Yes	Yes	Yes

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Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Lotus Notes	Yes	No	Yes	Yes	Yes
Only business (not personal) contacts	Yes	Yes	Yes	Yes	Yes
Call centre automation	Yes	No	Yes	Yes	Yes
Computer telephony integration	Yes	No	Yes	Yes	Third party
Predictive dialers	Partly	No	Yes	Yes	Third party
Pop up name on incoming call with authorization from contact	Yes	No	Yes	Yes	Yes
Statistics including call duration	Yes	No	Yes	Yes	Yes
Technology					
Multi-user	Yes	Yes	Yes	Yes	Yes
XML enabled	Yes	Partly	Yes	Yes	Yes
Three-tier architecture	Yes	No	Yes	Yes	Yes
Customizable	Yes	Yes	Yes	Yes	Yes
Different view of screens by employee or role	Yes	Yes	Yes	Yes	Yes
Without changing source code	Yes	Yes	Yes	Yes	Yes
Add user-defined fields	Yes	Yes	Yes	Yes	Yes
Unlimited	Yes	Yes	Yes	No	Yes
Defaults	Yes	Yes	Yes	Yes	Yes
Validation	Yes	Yes	Yes	Yes	Yes
Move fields around screen	Yes	Yes	Yes	Yes	Yes
Change tab order of fields	Yes	Yes	Yes	Yes	Yes
Change fields to required, optional or invisible	Yes	Yes	Yes	Yes	Yes
Change field captions and headings	Yes	Yes	Yes	Yes	Yes
Add new sub-form and push buttons	Yes	Yes	Yes	Yes	Yes
Apply to all or selected users	Yes	Yes	Yes	Yes	Yes
Work flow	Yes	Yes	Yes	Yes	Yes
Alerts, e.g., if date for follow up is missed	Yes	Yes	Yes	Yes	Yes
Electronic routings if approval required	Yes	Yes	Yes	Yes	Yes
Name 1 to 5 unique or very important features of your product					

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Unique/important feature no. 1	Fully web deployed	Customizable list view to manage all contacts and opportunities in one place; also, set custom activities and priority types	WorkFlow automation included	Automated business processes via unique agent technology	E.piphany products are based on Java 2, Enterprise Edition, allowing the company to leverage services provided by companies such as IBM and BEA, and focus on developing high-quality CRM applications, not infrastructure
Unique/important feature no. 2	Wireless access (mobile phone, PDA)	Custom sales quote generation; create or import product lists with item numbers, cost and price to automate quote generation	Disconnected version available		E.piphany's Customer Relationship Backbone, provides a unified view of an enterprise's customer data and allows the delivery of dynamic business processes and actionable customer intelligence.
Unique/important feature no. 3	Complete "back end" integration with ERP	Create company records to see the entire business relationship; also, organize data into groups and 15 levels of subgroups for individual treatment. Add virtually unlimited secondary contacts	.Net version available	Ability to connect create one to many and many to many relationships	E.piphany is uniquely able to deliver intelligent decisioning capability at the point of customer interaction. Unlike classic rules-based approaches, E.piphany provides the ability to incorporate live contextual information into the decision that can affect customer behaviour

Question	ACCPAC CRM	ACT!	Clientele	CommenceRM	E.piphany E.6 CRM Suite
Unique/important feature no. 4	Remote user 'solo synchronization'	Built-in sales forecasting tools; track opportunities through the sales cycle with the Interactive Pipeline Graph	Easy to configure		Business solutions that uniquely blend marketing and operational CRM capabilities
Unique/Important Feature #5	Easily integrated to other enterprise applications and datastores	One-click export to Microsoft Excel for easy data analysis and reporting	Easy and cost-effective to implement	Complete customization without programmer intervention	E.piphany goes to market around with a "Plug-in, Augment, Transform" deployment strategy. Rather than selling more functionality than is required, E.piphany focuses on assessing the customer's CRM goals, then mapping solutions incrementally to meet those goals over time

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Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Product	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Vendor	Interface Software	Atum Corporation	Maximizer Software Inc.	Microsoft	SAP
Version	5.1	6.3248	8	1.2	4
Release date (mmm-yy)	Sep-03	Sep-02	Feb-04	Jan-04	Aug-03
Contact					
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E-mail	jlipsey@interfacesoftware.com	lszczurowski@atum.com	rhilsen@maximizer.com	kglenn@microsoft.com	michael.davidson@sap.com
Website	www.interfacesoftware.com	www.luxorcrm.com	www.maximizer.com	http://www.microsoft.com/BusinessSolutions/crm	www.sap.com
Cost (Canadian dollars) for typical implementation					
Licence based					
Average cost per user	\$375		\$489	\$1,300	
Average number of users	250		20	20	
Average cost	\$93,750		\$9,780	\$26,000	
Average Implementation costs / licence costs				0.75	
Average implementation costs	\$0			\$19,500	
Average infrastructure upgrade costs / licence costs				0.50	
Average infrastructure upgrade costs	\$0			\$9,750	
Total	\$93,750			\$55,250	
ASP (Application Service Provider) based				Available through ISV solution provider	

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Average setup or fixed fees		\$2,000			
Average annual fee / user		\$720			
Average number of users		20			
Average fees - year one		\$16,400			
Average implementation costs / average fees - year one					
Average implementation costs		\$0			
Average infrastructure upgrade costs / average fees - year one					
Average infrastructure upgrade costs		\$0			
Total		\$16,400			
Applications (Yes/No/Partly/Third party/By next year/Customization)					
Contact management	Yes	Yes	Yes	Yes	Yes
Sales force automation	Yes	Yes	Yes	Yes	Yes
Marketing automation	Yes	Yes	Yes	Yes	Yes
Services management	Yes	Yes		Yes	Yes
Call centre	No	Partly		Third party	Yes
Knowledge management	Yes	Yes	Yes	Yes	Yes
Business intelligence	Third party	Yes	Yes	Yes	Yes
Profile					
World head office location	Oak Brook, IL	Concord Ontario Canada	Vancouver, BC	Redmond, Washington USA	Waldorf, Germany
Canadian head office location		Concord Ontario Canada	Vancouver, BC	Toronto, ON	Toronto, ON
No. of customers - worldwide - all products	421	500			23,400
No. of customers - worldwide - this product	421	200	6,000	2,500	2,500
No. of customers - Canada - all products	18	150			over 500
No. of customers - Canada - this product	18	50	1,200		
Revenue 2003 - CAD - all products	\$24,168,000			\$44 B	
Revenue 2003 - CAD - this product	\$24,168,000		\$9,779		
Revenue 2002 - CAD - all products	\$23,186,500				
Revenue 2002 - CAD - this product	\$23,186,500		\$8,070		

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Target market					
Average revenue/customer (CAD)			\$1 M - \$250M	\$5-500M	
Average no. of employees/customer		40	10 - 1,000	15-50	
Industry classification based on the North American Industry Classification System (NAICS) - See http://www.naics.com/info.htm#Structure for more about NAICS (Approximate % of implementations)					
11 Agriculture, forestry, fishing and hunting			1%	1%	
21 Mining		1%	1%	1%	
22 Utilities		1%	1%	1%	
23 Construction		3%	1%	2%	
31-33 Manufacturing		6%	20%	9%	
42 Wholesale trade		8%	10%	7%	
44-45 Retail trade			1%	2%	
48-49 Transportation and warehousing		10%	1%	2%	
51 Information		33%	20%	1%	
52 Finance and insurance	10%	15%	10%	4%	
53 Real estate and rental and leasing		3%	5%	1%	
54 Professional, scientific, and technical services	90%	3%	20%	5%	
55 Management of companies and enterprises		5%	1%	11%	
56 Administrative and support and waste management and remediation services		1%	1%	1%	
61 Education services		1%	2%	10%	
62 Health care and social assistance		5%	1%	5%	
71 Arts, entertainment, and recreation		2%	1%	5%	
72 Accommodation and food services		1%	1%	5%	
81 Other services (except public administration)		1%	1%	27%	
92 Public administration		1%	1%		
Total	100%	100%	100%	100%	
Technology					
Database (approximate % of implementations)					

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Microsoft SQL Server	95%	100%	30%	100%	Yes
Oracle	5%				Yes
Pervasive SQL			70%		
IBM DB2					Yes
Sybase					
Informix					Yes
Access					
Btrieve					
Proprietary					
FoxPro					
Progress					
Other					Maxdb
Total	100%	100%	100%	100%	
Networks supported (approximate % of implementations)					
Microsoft	100%	100%	95%	100%	yes
Linux					yes
Unix					yes
AIX					yes
Novell Netware			5%		no
IBM AS/400 (OS/400)					yes
Other					Z/OS(IBM)
Total	100%	100%	100%	100%	
Development tools used to build application		ASP, ASP.NET, Javascript,SQL Server	Microsoft Development Environment 2003 (Visual Studio .NET, Visual Basic .NET), Microsoft Windows Server 2003 Family, Microsoft Office 2003, MS SQL 2000, Microsoft Project 2003, Visual Source Safe, Windows Clients (98, 98SE, ME, XP), Windows Servers (NT4, 2000, 2003), and Visio	.Net Framework	
Integration to ERP or accounting systems - which?	Any Third party application	Any	QuickBooks	Out of the box Microsoft Great Plains through partners all ERP solutions	Predefined integration across the enterprise: ERP, accounting, HR, supply chain

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
% of application available from browser not including use of Citrix or Terminal Services	100%	100%	75%	100%	100%
Expected date for web-based version			Available now	Today	Available today
Available from Application Service Provider	No	Yes		Yes	Yes
Approx. no. of implementations		200			
Features					
Business Intelligence					
Analyse performance related to CRM	No	Yes	Yes	Yes	Yes
KPI's	No	Yes	Yes	Yes	Yes
Forecasts of customer behaviour	No	Yes	Third party	Yes	Yes
Contact management					
Multiple criteria used to create list for mail merge	Yes	Yes	Yes	Yes	Yes
Mass update noting all clients that were updated	Yes	Yes	Yes	Yes	Yes
Multiple addresses per contact	Yes	Yes	Yes	Yes	Yes
Identify potential duplicates for new contact	Yes	Yes	Yes	Partly	Yes
Duplicate merge process	Yes	Yes	Yes	Yes	Yes
Audit trail	Yes	Yes	Yes	Yes	Yes
Date and person making change	Yes	Yes	Yes	Yes	Yes
Full audit trail with what was changed	Yes	Yes	No	Partly	Yes
Unlimited follow-ups with contact	Yes	Yes	Yes	Yes	Yes
Unlimited notes per contact with date/time stamp	Yes	Yes	Yes	Yes	Yes
Search for embedded text in notes	Yes	Yes	Yes	Yes	Yes
Two steps to delete contact	Yes	Yes	Yes	Yes	Yes
Contact hierarchy	Yes	Yes	Yes	Third party	Yes
2 levels - organization and employees - EG might want to view all lawyers in a specified legal firm	Yes	Yes	Yes	Third party	Yes
Default address information from organization - but can override	Yes	Yes	Yes	Yes	Yes
3 levels - organization / location / employee	Yes	Yes	Yes	Third party	Yes
French version	No	Partly	Third party	Yes	Yes
Screens	No	Partly	Yes	Yes	Yes
Reports	No	Yes	Yes	Yes	Yes

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Documentation	No	Partly	Yes	Yes	Yes
Integration					
XML enabled	Yes	Partly	Yes	Yes	Yes
Import processor	Yes	Yes	Yes	Yes	Yes
API (Application Programming Interface)	Yes	Partly	Yes	Yes	Yes
Marketing automation	Yes	Yes	Yes	Yes	Yes
Record temporary contact information and later convert to prospect	Yes	Yes	Yes	Yes	Yes
Permission based	Yes	Yes	Yes	Yes	Yes
Scripts for direct marketing	No	Yes	Yes	Yes	Yes
Use Microsoft Exchange Server for e-mail blasts	Yes	No	Yes	Yes	Yes
Use a SMTP Server for e-mail blasts	Yes	Yes	Yes	No	Yes
E-mail history stored in CRM database	Yes	Yes	Yes	Yes	No
Multiple relationships for each contact	Yes	Yes	Yes	Yes	Yes
Primary relationship	Yes	Yes	Yes	Yes	Yes
Four secondary relationships	Yes	Yes	Yes	Third party	Yes
Ten secondary relationships	Yes	Yes	Yes	Third party	Yes
Each relationship is a contact (set-up once)	Yes	Yes		Yes	No
Online					
E-commerce - orders, check status...	No	Third party	Yes	Third party	Yes
Self Serve - Access product support information...	Yes	Yes	Yes	Third party	Yes
Campaign management - prospects respond online	Third party	Yes	Yes	Third party	Yes
Register for seminars	Yes	Yes	Customization	Third party	Yes
Sales force automation	Yes	Yes	Yes	Yes	Yes
Track status of opportunity	Yes	Yes	Yes	Yes	Yes
Proposal generation	Third party	Yes	No	Yes	Yes
Security					
By employee	Yes	Yes	Yes	Yes	Yes
By role	Yes	Yes	Yes	Yes	Yes
Services management	No	Yes	Yes	Yes	Yes
Maintain contract	No	Yes	Yes	Yes	Yes
Scheduling	No	Yes	Yes	Third party	Yes
Dispatching	No	Partly	Yes	Third party	Yes
Synchronization					
Palm Pilot	Yes	Yes	Yes	Third party	Yes
Windows CE	No	Yes	Yes	Yes	Yes
Microsoft Outlook	Yes	Yes	Yes	Yes	Yes

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Lotus Notes	Yes	Third party	Third party	No	Yes
Only business (not personal) contacts	Yes	Yes	Yes	Yes	Yes
Call centre automation	No	Partly	Yes	Third party	Yes
Computer telephony integration	Third party	No	Third party	Third party	Yes
Predictive dialers		No	No	Third party	Yes
Pop up name on incoming call with authorization from contact	Third party	No	Third party	Third party	Yes
Statistics including call duration	Third party	Partly	Yes	Yes	Yes
Technology					
Multi-user	Yes	Yes	Yes	Yes	Yes
XML enabled	Yes	Yes	Yes	Yes	Yes
Three-tier architecture	Yes	Yes	Yes	Yes	Yes
Customizable	Yes	Yes	Yes	Yes	Yes
Different view of screens by employee or role	Yes	Yes	Yes	Yes	Yes
Without changing source code	Yes	Yes	Yes	Yes	Yes
Add user-defined fields	Yes	Yes	Yes	Yes	Yes
Unlimited	Yes	Yes	Yes	Yes	Yes
Defaults	Yes	Yes	Yes	Yes	Yes
Validation	Yes	Yes		Yes	Yes
Move fields around screen	Yes	Yes	Customization	Yes	Yes
Change tab order of fields	Yes	Yes	Customization	Yes	Yes
Change fields to required, optional or invisible	Yes	Yes	Yes	Yes	Yes
Change field captions and headings	Yes	Yes	Yes	Yes	Yes
Add new sub-form and push buttons	Yes	Yes	Customization	Yes	Yes
Apply to all or selected users	Yes	Partly	Yes	Yes	Yes
Work flow		Partly	Yes	Yes	Yes
Alerts, e.g., if date for follow up is missed	Yes	Yes	Yes	Yes	Yes
Electronic routings if approval required	No	Yes	Yes	Yes	Yes
Name 1 to 5 unique or very important features of your product					

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Unique/important feature no. 1	Who Knows Whom - View who else in the organization knows a contact	Reminder notification to cellular phones and other mobile devices	New accounting links for QuickBooks - An accounting link provides users with a complete customer view from a single interface	Strong integration to the Microsoft Outlook	Full integrated to ERP, supply chain management, HR, and financials supporting CRM functions throughout the entire enterprise
Unique/important feature no. 2	Relationship Map - View what other contacts known to the organization have a relationship with a contact	Quota Management	New Crystal Reports - Every Maximizer Enterprise 8 user gets Crystal Reports (by Business Objects) for free, a product that would otherwise cost the customer \$199 to purchase. 150+ pre formatted reports	Easy of use wish drives high user adoption	Specific functionality for 23 vertical industries
Unique/important feature no. 3	My Watch List - Automated alerts when important changes occur to contacts you are watching	Expense management	Advanced Integration with Microsoft Outlook - Users can read Outlook messages inside Maximizer Enterprise 8 and can save messages directly to customer records in Maximizer Enterprise 8; customer lists can be synchronized with the Outlook address book (no reformatting or re-typing is required)	Enablement of business processes through a powerful workflow engine	Complete enterprise services architecture (Netweaver) that supports heterogeneous IT environments

Question	InterAction	Luxor CRM	Maximizer Enterprise	Microsoft Business Solution CRM	mySAP CRM
Unique/important feature no. 4	Engagement management - Ability to associate people and companies with engagements; identify internal experience and expertise	Multiple sales methodology support at one time	Palm synchronization - The Employee Portal for Wireless PDAs enables users to securely access their critical customer details and appointments and carry out tasks without having to synchronize or install extra software on the PDA device - all in real time	Ease of customization and integration	
Unique/Important Feature #5	Opportunity management - Ability to manage prospective engagements through the business development cycle	Calendar sharing	Customizable user defined fields (UDFs)	.Net architecture	

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Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Product	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Vendor	NetSuite, Inc.	Oracle Corporation	Intuit Canada	Best Software
Version	9.5	Oracle E-Business Suite 11i	2005	6.2
Release date (mmm-yy)	Spring 04	Available now	Sep-04	Aug-04
Contact				
Name	Michael Kellner	Patricia Vernon	Stuart De Vries	Michael Rich
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Website	www.netsuite.com	www.oracle.com	www.quickbooks.ca	http://www.saleslogix.com
Cost (Canadian dollars) for typical implementation		Oracle's Canadian pricing is available at http://oraclestore.oracle.com/OA_HTML/ibeCtpSctDsP RTE.jsp?a=b .		
Licence based				
Average cost per user	\$99			\$895
Average number of users	20		1	30
Average cost	\$1,980			\$26,850
Average Implementation costs / licence costs	2.00			1.50
Average implementation costs	\$3,960			\$40,275
Average infrastructure upgrade costs / licence costs	2.00			1.25
Average infrastructure upgrade costs	\$7,920			\$50,344
Total	\$13,860			\$117,469
ASP (Application Service Provider) based				Not offered directly, but can be purchased via several Business Partners

Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Average setup or fixed fees	\$20,000			
Average annual fee / user	\$99			
Average number of users	20			
Average fees - year one	\$21,980			
Average implementation costs / average fees - year one	1.25			
Average implementation costs	\$27,475			
Average infrastructure upgrade costs / average fees - year one	0.25			
Average infrastructure upgrade costs	\$6,869			
Total	\$56,324			
Applications (Yes/No/Partly/Third party/By next year/Customization)				
Contact management	Yes	Yes	Yes	Yes
Sales force automation	Yes	Yes	Third party	Yes
Marketing automation	Yes	Yes	Partly	Yes
Services management	Yes	Yes	Yes	Third party
Call centre	Yes	Yes	No	Yes
Knowledge management	Yes	Yes	Yes	Yes
Business intelligence	Yes	Yes	Yes	Yes
Profile				
World head office location	San Mateo, CA	Redwood Shores, CA	Mountain View, CA	Scottsdale, Arizona
Canadian head office location	Toronto, ON	Mississauga, ON	Edmonton, AB	Markham, ON
No. of customers - worldwide - all products	8,000		>10M	4.3M
No. of customers - worldwide - this product	5,000		First year	6,500
No. of customers - Canada - all products	1,000			
No. of customers - Canada - this product	500		First year	
Revenue 2003 - CAD - all products				\$899M
Revenue 2003 - CAD - this product			First year	
Revenue 2002 - CAD - all products				
Revenue 2002 - CAD - this product			First year	

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Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Target market				
Average revenue/customer (CAD)	Under \$150M			
Average no. of employees/customer	1-500		10	250
Industry classification based on the North American Industry Classification System (NAICS) - See http://www.naics.com/info.htm#Structure for more about NAICS (Approximate % of implementations)				
11 Agriculture, forestry, fishing and hunting				less than 1%
21 Mining				less than 1%
22 Utilities				
23 Construction				1%
31-33 Manufacturing				17%
42 Wholesale trade				9%
44-45 Retail trade				2%
48-49 Transportation and warehousing				4%
51 Information				
52 Finance and insurance				10%
53 Real estate and rental and leasing				1%
54 Professional, scientific, and technical services				
55 Management of companies and enterprises				
56 Administrative and support and waste management and remediation services				
61 Education services				
62 Health care and social assistance				
71 Arts, entertainment, and recreation				
72 Accommodation and food services				
81 Other services (except public administration)				32%
92 Public administration				less than 1%
Total				
Technology				
Database (approximate % of implementations)				

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Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Microsoft SQL Server				90%
Oracle		100%		10%
Pervasive SQL				
IBM DB2				
Sybase				
Informix				
Access				
Btrieve				
Proprietary			100%	
FoxPro				
Progress				
Other				
Total		100%	100%	100%
Networks supported (approximate % of implementations)				
Microsoft	Yes	20%		100%
Linux	Yes	10%		0%
Unix	Yes	70%		0%
AIX		Yes		0%
Novell Netware				0%
IBM AS/400 (OS/400)				0%
Other	MAC			0%
Total		100%		100%
Development tools used to build application			Proprietary	Microsoft .NET; Delphi
Integration to ERP or accounting systems - which?			QuickBooks	Best Software Products (MAS, ACCPAC, etc.); Great Plains; JD Edwards; others (see website for full listing)

Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
% of application available from browser not including use of Citrix or Terminal Services	100%	100%	0%	95%
Expected date for web-based version	NetSuite is web-based	Oracle has provided fully Web-enabled versions of its applications software since April 1998		
Available from Application Service Provider	Yes	Yes	Yes	Yes
Approx. no. of implementations	8,000		First year	
Features				
Business Intelligence				
Analyse performance related to CRM	Yes	Yes	Yes	Yes
KPI's	Yes	Yes		Yes
Forecasts of customer behaviour	Yes	Yes	Yes	Third party
Contact management				
Multiple criteria used to create list for mail merge	Yes	Yes	No	Yes
Mass update noting all clients that were updated	Yes	Yes	Yes	Yes
Multiple addresses per contact	Yes	Yes	Yes	Yes
Identify potential duplicates for new contact	Yes	Yes	Yes	Yes
Duplicate merge process	Yes	Yes	Yes	Yes
Audit trail	Yes	Yes	Yes	Yes
Date and person making change	Yes	Yes	Yes	Yes
Full audit trail with what was changed	Yes	Yes	Yes	Yes
Unlimited follow-ups with contact	Yes	Yes	Yes	Yes
Unlimited notes per contact with date/time stamp	Yes	Yes	Yes	Yes
Search for embedded text in notes	Yes	Yes	Partly	Yes
Two steps to delete contact	No	Yes	Yes	Yes
Contact hierarchy	Yes	Yes	Yes	Yes
2 levels - organization and employees - EG might want to view all lawyers in a specified legal firm	Yes	Yes	Yes	Yes
Default address information from organization - but can override	Yes	Yes	Yes	Yes
3 levels - organization / location / employee	Yes	Yes	Yes	Yes
French version	Yes	Yes	No	Yes
Screens	Yes	Yes	No	Yes
Reports	Yes	Yes	No	Yes

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Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Documentation	Yes	Yes		Yes
Integration				
XML enabled	Yes	Yes		Yes
Import processor	Yes	Yes	Yes	Yes
API (Application Programming Interface)	Yes	Yes		Yes
Marketing automation	Yes	Yes	Yes	Yes
Record temporary contact information and later convert to prospect	Yes	Yes	Yes	Yes
Permission based	Yes	Yes	Yes	Yes
Scripts for direct marketing	Yes	Yes	No	Yes
Use Microsoft Exchange Server for e-mail blasts	Yes	Yes	No	Yes
Use a SMTP Server for e-mail blasts	No	Yes	No	Yes
E-mail history stored in CRM database	Yes	Yes	Yes	Yes
Multiple relationships for each contact	Yes	Yes	Yes	Yes
Primary relationship	Yes	Yes	Yes	Yes
Four secondary relationships	Yes	Yes		Yes
Ten secondary relationships	Yes	Yes		Yes
Each relationship is a contact (set-up once)	Yes	Yes	Yes	Yes
Online				
E-commerce - orders, check status...	Yes	Yes	No	Third party
Self Serve - Access product support information...	Yes	Yes	Yes	Yes
Campaign management - prospects respond online	Yes	Yes	No	Yes
Register for seminars	Yes	Yes	No	Third party
Sales force automation	Yes	Yes	No	Yes
Track status of opportunity	Yes	Yes	No	Yes
Proposal generation	Yes	Yes	No	Yes
Security				
By employee	Yes	Yes		Yes
By role	Yes	Yes		Yes
Services management	Yes	Yes		Yes
Maintain contract	Yes	Yes		Yes
Scheduling	Yes	Yes		Yes
Dispatching	Yes	Yes		Yes
Synchronization				
Palm Pilot	Yes	Yes	No	Yes
Windows CE	Yes	Yes	No	Yes
Microsoft Outlook	Yes	Yes	Yes	Yes

Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Lotus Notes	No	Yes	No	Yes
Only business (not personal) contacts	No	Yes		Yes
Call centre automation	Yes	Yes	No	Third party
Computer telephony integration	No	Yes	No	Third party
Predictive dialers	Yes	Yes	No	No
Pop up name on incoming call with authorization from contact	Yes	Yes	No	Third party
Statistics including call duration	Yes	Yes	No	Third party
Technology				
Multi-user	Yes	Yes	No	Yes
XML enabled	Yes	Yes	No	Yes
Three-tier architecture	Yes	Yes		Yes
Customizable	Yes	Yes		Yes
Different view of screens by employee or role	Yes	Yes	Yes	Yes
Without changing source code	Yes	Yes	Yes	Yes
Add user-defined fields	Yes	Yes	Yes	Yes
Unlimited	Yes	Yes	No	Yes
Defaults	Yes	Yes	Yes	Yes
Validation	Yes	Yes	Yes	Yes
Move fields around screen	Yes	Yes	No	Yes
Change tab order of fields	Yes	Yes	No	Yes
Change fields to required, optional or invisible	Yes	Yes	Yes	Yes
Change field captions and headings	Yes	Yes	No	Yes
Add new sub-form and push buttons	Yes	Yes	No	Yes
Apply to all or selected users	Yes	Yes	Yes	Yes
Work flow	Yes	Yes		Yes
Alerts, e.g., if date for follow up is missed	Yes	Yes		Yes
Electronic routings if approval required	Yes	Yes		Yes
Name 1 to 5 unique or very important features of your product				

Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Unique/important feature no. 1	Customer Mining and Segmentation Tools	Oracle's integrated CRM applications give users information-driven sales, service and marketing because they're built on an open, standards-based architecture that streamlines business processes, improves data quality, and allows all key divisions to draw from the same source of data	Synchronizes with QuickBooks	Ease of use - Based on usability features learned with ACT!; Maximize return on investment by maximizing software use
Unique/important feature no. 2	Advanced Expression Builder	Oracle has more than 50 CRM-specific applications that help users address every phase of the sales, service, and marketing cycles	Tracks all calls, notes, letters, appointments and e-mails	Flexibility - Ease of Customization and Configuration
Unique/important feature no. 3	Target group creation tools	Complete business flows streamline business processes	Integrates Outlook Calendar	Synchronization - Rock-solid and flexible synchronization for deployment over networks, WANs, offline, and Web

Question	NetSuite	Oracle E-Business Suite	QuickBooks Customer/Client Manager	SalesLogix
Unique/important feature no. 4	Analytics via search	Open integration from front to back office and with third- party vendors	Quickly access customer transactions	Integration - Integration with other back-office systems as well as front office applications like Microsoft Outlook and Microsoft Office
Unique/Important Feature #5	Patent pending, no-click e-mail integration	Fast implementation options for rapid ROI	Drag and drop e-mail from outlook into CRM	TCO - Affordable CRM that maximizes your investment by increasing usability, and decreasing management and deployment costs