



Workbooks vs. Competitors

Description

This document compares Workbooks with its main competitors highlighted on the CRM Grid®. Satisfaction and feature ratings for products are shown below. The highest score for each metric is in green. Satisfaction, feature and additional ratings are included.

Data in this document was pulled from reviews submitted up through May 31, 2022.

Satisfaction Ratings

	Satisfaction		Satisfaction by Category						Net Promoter Score (NPS)
	Likelihood to Recommend	Product Going in Right Direction?	Meets Requirements	Ease of Admin	Ease of Doing Business With	Quality of Support	Ease of Setup	Ease of Use	Net Promoter Score (NPS) (Range from -100 to +100)
Workbooks	85%	88%	86%	84%	88%	87%	82%	86%	43
HubSpot Sales Hub	87%	88%	88%	88%	89%	88%	86%	89%	56
Microsoft Dynamics 365 Sales	75%	68%	83%	79%	81%	79%	76%	78%	10
Sage CRM	73%	58%	77%	73%	70%	71%	69%	74%	1
Salesforce Sales Cloud	85%	83%	89%	80%	84%	82%	76%	82%	46
Sugar Sell (formerly SugarCRM)	75%	72%	82%	79%	80%	79%	75%	79%	15
Zendesk Sell	85%	88%	85%	89%	91%	87%	89%	89%	47
Zoho	80%	79%	85%	81%	82%	78%	80%	83%	28
Zoho CRM Plus	84%	82%	86%	81%	77%	86%	76%	85%	47
GoldMine	73%	49%	81%	77%	78%	77%	71%	78%	6
Average	87%	86%	88%	88%	90%	88%	85%	88%	56

*N/A is displayed when fewer than five responses were received for the question.

**Net Promoter Score ranges from -100 to +100

Workbooks vs. Competitors

Feature Comparison / Sales Force Automation

	Contact & Account Mgmt.	Partner Relationship Mgmt. (PRM)	Opportunity & Pipeline Mgmt.	Task / Activity Mgmt.	Territory & Quota Mgmt.	Desktop Integration	Product & Price List Mgmt.	Quote & Order Mgmt.	Customer Contract Mgmt.
Workbooks	87%	83%	84%	85%	82%	83%	81%	84%	84%
HubSpot Sales Hub	89%		87%	87%	81%	87%	81%	81%	85%
Microsoft Dynamics 365 Sales	84%	82%	82%	81%	79%	82%	80%	81%	83%
Sage CRM	76%		76%	78%	70%	70%	73%	73%	74%
Salesforce Sales Cloud	89%	85%	88%	85%	83%	85%	83%	83%	85%
Sugar Sell (formerly SugarCRM)	84%	81%	81%	80%	76%	77%	77%	78%	82%
Zendesk Sell	87%		88%	85%	79%	85%	81%	81%	83%
Zoho	86%	85%	83%	83%	80%	84%	81%	81%	84%
Zoho CRM Plus	84%	77%	73%	78%	88%	71%	80%	73%	78%
GoldMine	84%		74%	81%	69%	73%	69%	70%	80%
Average	88%	85%	86%	87%	83%	85%	83%	84%	86%

*N/A is displayed when fewer than five responses were received for the question.

**A blank box indicates that a seller has selected that they do not offer that feature.

Workbooks vs. Competitors

Feature Comparison / Marketing Automation

	Email Marketing	Campaign Management	Lead Management	Marketing ROI Analytics
Workbooks	81%	81%	83%	83%
HubSpot Sales Hub	89%	88%	89%	85%
Microsoft Dynamics 365 Sales	79%	79%	81%	79%
Sage CRM	69%	74%	74%	71%
Salesforce Sales Cloud	82%	83%	86%	82%
Sugar Sell (formerly SugarCRM)	76%	76%	81%	75%
Zendesk Sell	78%	79%	85%	78%
Zoho	82%	81%	85%	81%
Zoho CRM Plus	79%	73%	83%	76%
GoldMine	72%		76%	
Average	84%	85%	87%	84%

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Workbooks vs. Competitors

Feature Comparison / Customer Support

	Case Management	Customer Support Portal	Knowledge Base	Call Center Features	Support Analytics
Workbooks	86%	83%	84%	84%	85%
HubSpot Sales Hub	86%	86%	87%	85%	86%
Microsoft Dynamics 365 Sales	83%	81%	82%	81%	82%
Sage CRM	73%	71%	73%	72%	67%
Salesforce Sales Cloud	85%	84%	84%	83%	84%
Sugar Sell (formerly SugarCRM)	82%	81%	81%	79%	81%
Zendesk Sell	83%	83%	84%	82%	83%
Zoho	82%	80%	81%	79%	82%
Zoho CRM Plus	80%	79%	86%	74%	84%
GoldMine	73%	73%	74%	65%	68%
Average	86%	85%	85%	84%	85%

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Workbooks vs. Competitors

Feature Comparison / Reporting & Analytics

	Reporting	Dashboards	Forecasting
Workbooks	84%	83%	83%
HubSpot Sales Hub	84%	86%	82%
Microsoft Dynamics 365 Sales	82%	82%	80%
Sage CRM	76%	78%	70%
Salesforce Sales Cloud	87%	87%	84%
Sugar Sell (formerly SugarCRM)	80%	82%	78%
Zendesk Sell	84%	84%	82%
Zoho	83%	83%	83%
Zoho CRM Plus	84%	83%	82%
GoldMine	73%	75%	69%
Average	85%	86%	83%

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Workbooks vs. Competitors

Feature Comparison / Mobile & Social

	Social Collaboration Features	Social Network Integration	Mobile User Support
Workbooks	82%	81%	79%
HubSpot Sales Hub	83%	86%	80%
Microsoft Dynamics 365 Sales	79%	79%	78%
Sage CRM			63%
Salesforce Sales Cloud	82%	81%	80%
Sugar Sell (formerly SugarCRM)	78%	77%	79%
Zendesk Sell			85%
Zoho	82%	82%	82%
Zoho CRM Plus	82%	80%	81%
GoldMine			59%
Average	83%	83%	83%

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Workbooks vs. Competitors

Feature Comparison / Platform

	Customisation	User, Role, and Access Management	Performance and Reliability
Workbooks	87%	87%	87%
HubSpot Sales Hub	82%	88%	88%
Microsoft Dynamics 365 Sales	84%	84%	80%
Sage CRM	74%	76%	73%
Salesforce Sales Cloud	87%	87%	89%
Sugar Sell (formerly SugarCRM)	86%	83%	80%
Zendesk Sell	83%	88%	90%
Zoho	82%	85%	85%
Zoho CRM Plus	N/A	N/A	N/A
GoldMine	77%	78%	78%
Average	85%	88%	88%

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Workbooks vs. Competitors

Feature Comparison / Integration

	Data Import & Export Tools
Workbooks	85%
HubSpot Sales Hub	87%
Microsoft Dynamics 365 Sales	81%
Sage CRM	73%
Salesforce Sales Cloud	86%
Sugar Sell (formerly SugarCRM)	79%
Zendesk Sell	89%
Zoho	85%
Zoho CRM Plus	N/A
GoldMine	74%
Average	85%

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Workbooks vs. Competitors

Additional Data / User Adoption and Return on Investment (ROI)

	User Adoption	Payback Period
	Average User Adoption	Estimated ROI (payback period in months)
Workbooks	76%	13
HubSpot Sales Hub	71%	13
Microsoft Dynamics 365 Sales	58%	18
Sage CRM	67%	24
Salesforce Sales Cloud	73%	19
Sugar Sell (formerly SugarCRM)	69%	18
Zendesk Sell	85%	10
Zoho	71%	11
Zoho CRM Plus	86%	15
GoldMine	80%	16
Average	72%	13

*N/A is displayed when data is not publicly available.

Grid® Methodology

Grid® Rating Methodology

The Grid® represents the democratic voice of real software users, rather than the subjective opinion of one analyst. G2 rates products from the CRM category algorithmically based on data sourced from product reviews shared by G2 users and data aggregated from online sources and social networks.

Technology buyers can use the Grid® to help them quickly select the best products for their businesses and to find peers with similar experiences. For sellers, media, investors, and analysts, the Grid® provides benchmarks for product comparison and market trend analysis.

Grid® Scoring Methodology

G2 rates products and sellers based on reviews gathered from our user community, as well as data aggregated from online sources and social networks. We apply a unique algorithm (v3.0) to this data to calculate the Satisfaction and Market Presence scores in real time. The Grid® Report for CRM | Summer 2022 is based on scores calculated using the G2 algorithm v3.0 from reviews collected through May 31, 2022. To view the CRM Grid® with the most recent data, please visit the [CRM](#) page.

Satisfaction

The Satisfaction rating is affected by the following (in order of importance):

- ▶ Customer satisfaction with end user-focused product attributes based on user reviews
- ▶ Popularity and statistical significance based on the number of reviews received by G2
- ▶ Quality of reviews received (reviews that are more thoroughly completed will be weighted more heavily)
- ▶ Age of reviews (more-recent reviews provide relevant and up-to-date information that is reflective of the current state of a product)
- ▶ Customers' satisfaction with administration-specific product attributes based on user reviews
- ▶ Overall customer satisfaction and Net Promoter Score® (NPS) based on ratings by G2 users

Note: The customer satisfaction score is normalized for each Grid®, meaning the scores are relative.

Market Presence

The Market Presence score is affected by the following (in order of importance):

- ▶ Market presence is a combination of 15 metrics from G2's reviews, publicly available information, and third-party sources
- ▶ Both the software sellers and the individual products are measured on various criteria. The criteria are listed in order of importance. Products metric receive greater weight than seller metrics

Criteria	Measured For		Metrics
	Product	Seller	
Number of Employees	✓	✓	Employee Count (based on social networks and public sources)
Reviews	✓		Review Count (weighted by recency)
Web Presence	✓	✓	
Social Presence	✓	✓	
Growth	✓	✓	Employee Growth, Web Presence Growth
Seller Age		✓	
Employee Satisfaction and Engagement		✓	

Grid® Methodology

- ▶ Each input is normalized by category and segment. This means that scores are relative to other products in the category/segment and may change from segment to segment
- ▶ The scores are then scaled from 0-100

Grid® Categorisation Methodology

Making G2 research relevant and easy for people to use as they evaluate and select business software products is one of our most important goals. In support of that goal, organizing products and software companies in a well-defined structure that makes capturing, evaluating, and displaying reviews and other research in an orderly manner is a critical part of the research process.

To manage the process of categorizing the software products and the related reviews in the G2 community, G2 follows a publicly available [categorization methodology](#). All products appearing on the Grid® have passed through G2's categorization methodology and meet G2's category standards.

Many terms that appear regularly across G2 and are used to aid in product categorization warrant a definition to facilitate buyer understanding. These terms may be included within reviews from the G2 community or in executive summaries for products included on the Grid®. A [list of standard definitions](#) is available to G2 users to eliminate confusion and ease the buying process.

Rating Changes and Dynamics

The ratings in this report are based on a snapshot of the user reviews and social data collected by G2 up through May 31, 2022. The ratings may change as the products are further developed, the sellers grow, and as additional opinions are shared by users. G2 updates the ratings on its website in real time as additional data is received, and this report will be updated as significant data is received. By improving their products and support and/or by having more satisfied customer voices heard, Contenders may become Leaders and Niche sellers may become High Performers.

Trust

Keeping our ratings unbiased is our top priority. We require the use of a LinkedIn account or verified business email address to validate a G2 user's identity and employer. We also validate users by partnering with sellers and organizations to securely authenticate users through select platforms. We do not allow users to review their current or former employers' products, or those of their employers' competitors. Additionally, all reviews are manually checked by our team after our algorithm filters out reviews that don't meet our submission requirements. All reviews must pass our moderation process before they are published.

Our G2 staff does not add any subjective input to the ratings, which are determined algorithmically based on data aggregated from publicly available online sources and social networks. Sellers cannot influence their ratings by spending time or money with us. Only the opinion of real users and data from public sources factor into the ratings.

Grid® Inclusion Criteria

All products in a G2 category that have at least 10 reviews from real users of the product are included on the Grid®. Inviting other users, such as colleagues and peers, to join G2 and share authentic product reviews will accelerate this process.

If a product is not yet listed on G2 and it fits the market definition above, then users are encouraged to [suggest its addition](#) to our [CRM category](#).

Product Profiles

Product profiles and detailed charts are included for products with 10 or more reviews.