



nio

DIGITAL TRANSFORMATION  
INSIGHTS

# Buyers Guide **CRM Solutions**

July 2022 | [www.niodigital.co](http://www.niodigital.co)

# Foreword

Thank you for downloading this report, which will help you better understand the various product offerings and key features from the leading vendors in the digital transformation space.

I have spent my entire career working with software known as ERP (Enterprise Resource Planning), CRM (Customer Relationship Management), SCM (Supply Chain Management), HRM (Human Resources Management) and MRP2 (Manufacturing Resource Planning) from brands such as Oracle, SAP and Microsoft. These business applications form the transactional and information backbone of all large companies worldwide, and are widely accepted to be a prerequisite to embarking on Digital Transformation.

These systems not only cost millions of dollars to implement, but need teams of highly skilled professionals to maintain and expensive annual upgrades. Therefore they have only been accessible to very large companies.

Due to advances in the world of open source and cloud technology, such systems are now available to a wider audience at a fraction of the cost. Instead of millions, the investment is in the tens or hundreds of thousands of TT dollars.

Odoo Inc. is a pioneer of this business model, and their product, aptly called “Odoo”, is the main component of our business plan - it's going to help us to achieve our mission to create a Digital Economy here in Trinidad and Tobago.

Of course, we all know that installing software is no magic bullet, to achieve Digital Transformation you will need the skills, capabilities and experiences of a partner. In my opinion, the right Odoo digital transformation vendor/partner:

- Provides experienced Digital Transformation Consulting support: A CIO service - a group of experienced professionals with access to a global network is vital to your company making the right strategic decisions. This will provide you with the best possible insights and direction for success in the future.
- Provides tailored staff training on an ongoing basis: One of the most important factors for success is educating your entire team - from the owner to the driver and everyone in between will need individualized intraining, with on-going support to help them navigate the changes digital transformation will herald.
- Has a full-time Odoo/Python development team: As Odoo is Open Source Software, managing it requires good technical knowledge at the source code level. Almost all projects require some degree of customization, and you will not realize the full value of Odoo without this development support. One-two developers aren't enough, a stable team complete with Business Analysts, Designers, Developers and Testers is needed.
- Provides 24/7 Support and Maintenance: You may not think that you need this now, but with accelerated technology, business today is 24/7 - consider remote working, online portals and many other customer, supplier and employee touch points.

Please keep these points in mind as you search for your Digital Transformation partner. In the next few pages, you will find additional information, which I hope will help you.

**Lorcan Camps**

Founder & CEO

July, 2022

# About Nio

## Our Mission

**“To help create and sustain a Digital Economy within Trinidad & Tobago.”**

To achieve this, we offer a Digital Business Platform comprising best-in-class open source software along with:

- **Digital Economy Accelerators** - Odoo Cloud ERP + industry solution accelerators to completely digitalize businesses.
- **Digital Transformation Services** - consulting, onboarding, mentoring, education & 24/7 support services to help companies along in their digitalization journey.
- **Digital Training Academy** - upskilling of professionals to operate a Digital Business Platform to improve business performance.
- **Digital Jobs** - creation of new roles to leverage the Digital Business Platform to increase revenues, reduce costs and improve service delivery.
- **Digital Business Network** - connect to a global digital ecosystem for mutual benefits.

## Nio Digital achieves Odoo Gold Partner status

[Port of Spain, Trinidad & Tobago. 1 April 2022]

Odoo Inc., a leading provider of all-in-one open source business software for companies worldwide has named Nio Digital Limited as its latest Gold Partner.

The award recognizes technical excellence and commitment to helping businesses succeed in their Digital Transformation journey. With over 3,500+ partners globally, Nio is now amongst the top 7.5% of partners globally, and the only Gold Partner in Trinidad and Tobago.

“Nio is the most experienced partner that we have in Trinidad & Tobago. Their focus and understanding of our clients’ problems and their track record of delivering high quality service is outstanding.”

**Alejandra Vela,**

Senior Account Manager for Latin America at Odoo Inc

# About Odoo

## Fits small and large companies alike

Odoo's mission is to provide a range of easy to use business applications that form a complete suite of tools to accompany any business need. Odoo gives millions of companies easy access to the software they need to run and expand their business.

Odoo has developed 30 key business applications which are regularly upgraded. In addition, a community of more than 1500 active members, has contributed another 16,000+ apps to cover a wide variety of business needs.

Odoo is the most installed business software in the world (source: Odoo.com). It is used by over 7,000,000 users worldwide ranging from startup companies (1 user) to large enterprises (300,000+ users).

## What makes Odoo different?

A smooth and friendly user experience built to ensure fast and seamless adoption.

Fluidity, full integration and customisation, meet the needs of even the most complex companies.

Odoo's flexibility means that apps can be added according to the growth of your company, adding one app at a time as your needs evolve and your customer base grows.

Thanks to the open source community, Odoo is actively maintained by a large base of developers to meet evolving customer needs and provide new, innovative applications.



# Odoo is positioned to disrupt the Market

## With a unique value proposition

Odoo provides everything a business needs to operate with a top-notch user experience.

- **CRM** apps for, Digital Marketing, Sales, Website, eCommerce, POS, Field Services and Helpdesk.
- **HRM** apps for Employees, Performance, Recruitment, Absence Management, Payroll & Productivity.
- **ERP** apps for Accounting, Purchasing, Inventory, Products, Service, Projects, Manufacturing and Warehousing.

Odoo apps work together seamlessly, giving you the ability to automate and track everything you do, centralized, online, and accessible from anywhere with any device.

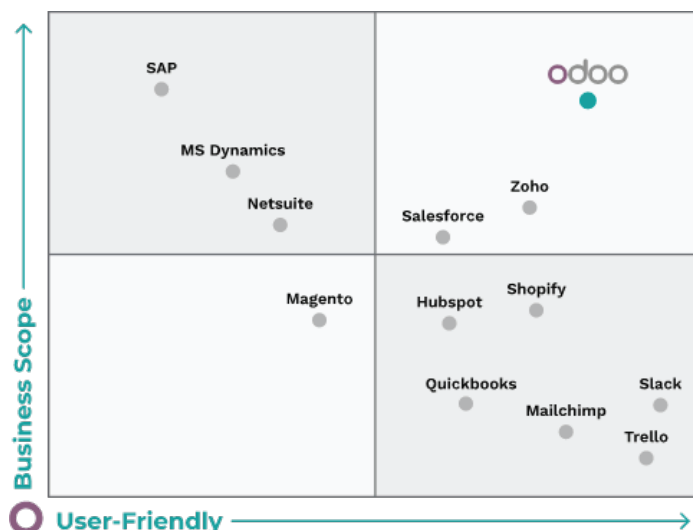
The open-source development model has allowed us to leverage thousands of developers and business experts to build the world's largest ecosystem of fully integrated business apps - all at the lowest possible cost.

With a modern and elegant technical design, Odoo's framework is unique. It allows Odoo and community developers to provide top-notch usability that scales across all apps.

Usability improvements made to Odoo are automatically applied to the entire suite of integrated apps.

Finally, with regular annual releases, Odoo evolves much faster than other solutions. When you put this all together, Odoo is positioned to disrupt the market with the broadest functionality comprising 30+ integrated apps with the best user experience at a significantly lower cost than the competition.

See below Odoo's positioning in the Business Applications Market



# Our Solutions



## Digital Commerce

Integrated eCommerce, digital marketing and sales with automation.



## HR Employee Portal

Quick and easy access to HR-related transactions and services.



## Wholesale Distribution

Specialised wholesale distribution industry solutions.



## Services

Professional and field service management solutions.



## Manufacturing

Flexible, integrated, and extensible manufacturing ERP software.



## Workspace

Email, office, conferencing and cloud solutions.

## Companies that trust us

**analogic solutions**



**AP Scott Trinidad Limited**  
"Sell You Today.....Serve You For Life"

**InterChem**

**CellMaster**



**Lange Trinidad Ltd.**

**Unipet**



# CRM Comparison White Paper:

Salesforce, Zoho CRM, SugarCRM, Pipedrive & Odoo

April 2016

# Introduction

## Introducing CRM offers available today

Today's CRM market offers a significant number of solutions and software alternatives. Some fit larger enterprises (which typically require on-premise hosting) while others apply more to the needs of SME's (commonly utilizing a cloud-hosted solution).

When it comes to CRM solutions, providers must adapt their product to fit a constantly changing business landscape. For example, more and more CRM solutions are now becoming available for mobile. This is a crucial advantage for modern companies and brings versatility to their CRM usage. Being able to maintain your customer relationships directly from your phone or tablet changes the way you operate and manage your sales activities.

Customer expectations are changing regarding CRM functionalities and best practices. Modern businesses need more than just the ability to manage their contacts; a CRM has to offer other features such as efficient communication tools, emailing, phone or chat integration, being social, and most importantly, having a great user interface for your salespeople to be productive.

## Features Comparison

In order to offer a fair comparison of the top CRM solutions, we have compiled a table of the most important features a CRM should offer. These are organized into five categories: Customer Relationship Management, Sales, Marketing, Reporting, and Productivity & Usability.

These categories encompass nearly everything a company might need in order to manage and further develop its customer relationships and sales pipeline. In this comparison, we have also included a comprehensive list of the pricing conditions for each solution.

# Introduction to CRM Software

## Salesforce

Founded in 1999 by a former Oracle Executive, Salesforce is the #1 selling CRM software and enterprise ecosystem. The Salesforce CRM platform, called Sales Cloud, is a SaaS offer which allows your sales teams multiple cloud-based solutions that will help them to locate leads and close more deals. There are 3 free major upgrades every year.

“ SELL SMARTER AND FASTER WITH  
THE WORLD’S #1 CRM. ”

The only free version of Salesforce is the “Developer Edition” which is limited in terms of data and number of users. Salesforce also provides 10 donated subscriptions and deep discounts to Nonprofit Organizations and higher education institutions.

Salesforce business solutions include Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Wave Analytics, App Cloud, and IoT Cloud. Four different pricing models and editions are available: SalesforceIQ CRM Starter, Professional, Enterprise and Unlimited (all are billed monthly). For this comparison, we will select Salesforce Enterprise.

150,000+  
customers

30+  
offices across  
the globe

founded in  
1999

19,000  
employees

## Zoho CRM

Founded in 1996, the company changed its name from AdventNet in 2009 and began focusing on SaaS services. Zoho is a business applications suite offering more than 30 apps to manage your company. Only available on the cloud, the apps are fully integrated and mobile friendly. This leader in cloud software focuses its budget mainly on R&D projects and insists on the fact that they remain private as no investors are involved.

“ THE OPERATING SYSTEM  
FOR BUSINESS ”

Zoho CRM exists in 4 versions: Standard, Professional, Enterprise, and CRM Plus. For instances of less than 10 users, you can use Zoho CRM for free. For this comparison we chose to compare the Professional edition.

15+  
million users

6  
offices

founded in  
1996

3,500  
employees



# SugarCRM

SugarCRM is a web-based CRM application available in open source or in a commercial version. Its modern interface helps both employees and customers to better engage and also includes a mobile application. Originally released as open source, SugarCRM no longer updates their community version since the release of version 7, but you can still find open source forks like vTiger.

“ CRM SOFTWARE TRUSTED BY  
MILLIONS WORLDWIDE ”

SugarCRM is divided into four editions: Community, Professional, Enterprise, and Ultimate. This solution is available online or on-premise, with the possibility of customization for both versions. For this comparison, we chose to include the Enterprise edition of SugarCRM.

1.5+  
million users

120  
countries

26  
languages

350+  
employees

## Pipedrive

New in the market, Pipedrive was founded in 2010. This solution is dedicated to managing leads and sales step-by-step. It was developed in conjunction with sales managers based on their direct sales experience. CRM is their unique product and only one version is available.

“ GREAT FOR SMALL TEAMS. ”

Very visual, Pipedrive can be installed quickly (in as little as 2 minutes) with no specific knowledge required. The application is cloud-based and you can work from anywhere via their mobile app.

10,000+  
customers

\$13.4  
million raised

founded in  
2010

156  
employees

## Odoo Online

Odoo is an open source software that is available in three editions, of which two are local and one is hosted in the cloud. More than 360 apps are available thanks to the multiple developments made by Odoo S.A. and its community. Some of these apps are officially validated by Odoo, whereas others are developed by the community and dedicated to specific versions for specific needs.

### “ GROW YOUR BUSINESS ”

For this comparison we'll choose the application Odoo CRM in the cloud-hosted version, Odoo Online. The unique feature of this offer is that it's completely customizable. There are more than 30 apps that cover the vast majority of business cases. These apps are all connected to the same database on Odoo's servers, linking your company's sales pipeline to the rest of your business operations.

2+  
million users

120+  
countries

730  
partners

1,500  
developers

# Features Comparison

CRM	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
<b>Leads Management</b>					
Leads Management	✓	✓	✓	✗	✓
Leads Scoring	✓	✗	✓	✗	✓
Deduplication	✓	✓	✓	✗	✓
Sales Quotas	✓	✗	✗	✗	✓
<b>Leads Acquisition</b>					
Emails Integration	✓	✓	✓	✗	✓
Contact Forms	✓	✓	✓	✗	✓
Website Call-To-Action	✗	✗	✗	✗	✓
Mass Import	✓	✓	✓	✓	✓
<b>Sales Pipeline</b>					
Opportunities Management	✓	✓	✓	✓	✓
In-Pipeline Management <sup>1</sup>	✓	✗	✗	✓	✓
Pipeline by Expected Closing Dates	✗	✗	✗	✓	✓
Log Calls	✓	✓	✓	✓	✓
Scripts/Automated Next Actions	✓	✗	✗	✗	✓
<b>Relationships</b>					
Companies	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Photos in Contacts	✗	✗	✗	✓	✓
Multiple Contacts per Company	✓	✓	✓	✓	✓
Multiple Companies per Contact	✓ <sup>2</sup>	✗	✓	✗	✗

<sup>1</sup> Opportunities are managed directly in the pipeline, rather than a list view

<sup>2</sup> Available in summer 2016

Sales	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
<b>Quotations</b>					
Quotations	✓	✓	✓	✗	✓
Pricelists	✗	✗	✗	✗	✓
Quotation Templates	✗	✗	✓	✗	✓
eSignature	✗	✗	✗	✗	✓
Online Payment	✗	✗	✗	✗	✓
Inline Negotiation	✓	✓	✗	✗	✓
Multiple UoM	✗	✗	✗	✗	✓
<b>Sales Order</b>					
Sales Orders	✓	✓	✓	✗	✓
Invoicing	✗	✓	✗	✗	✓
Customer Portal	✗	✗	✗	✗	✓
Shipper Integration (Cost+Tracking)	✗	✗	✓ <sup>1</sup>	✗	✓
Subscriptions Management	✗	✗	✗	✗	✓

1 Available through third-party modules

Marketing	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
Leads Generation					
Mass Mailing	✓	✓	✓	✗	✓
Web to Leads Capture	✓	✓	✓	✗	✓
Leads Tracking (Visited Pages)	✗	✗	✗	✗	✓
Leads Nurturing					
Events	✗	✗	✗	✗	✓
Surveys	✓	✓	✗	✗	✓
Blogs	✗	✗	✗	✗	✓

Reporting	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
Reports					
Activities Analysis	✓	✓	✓	✓	✓
Pipeline Analysis	✓	✓	✓	✓	✓
Sales Analysis	✓	✓	✓	✓	✓
Invoice Analysis	✗	✓	✗	✗	✓
Sales Forecasts	✓	✓	✓	✗	✓
Commissions & Targets	✓	✓	✓ <sup>1</sup>	✗	✗
Recurring Business <sup>2</sup>	✗	✗	✗	✗	✓
Report Engine					
Dynamic Graphs	✓	✓	✓	✓	✓
Dynamic Pivot Table	✗	✗	✗	✗	✓
Customizable Dashboard	✓	✓	✓	✓	✓

<sup>1</sup> Available through a third-party app

<sup>2</sup> KPIs, MRR, Churn, CLTV, CAC Ratio, etc.



Productivity & Usability	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
<b>Productivity</b>					
VOIP Integration	✓	✓	✓	✓	✓
Calendar Integration	✓	✓	✓	✓	✓
Realtime Chat	✓	✗	✗	✗	✓
Ability to Add Fields	✓	✓	✓	✓	✓
Drag and Drop Fields	✓	✗	✓	✓	✗
Social Network Integration	✗	✗	✗	✗	✗
<b>Emails</b>					
Email Integration	✓	✓	✓	✗	✓
Email Templates	✓	✗	✓	✗	✓
<b>Users Satisfaction</b>					
Brand Visibility <sup>1</sup>	★★★★☆	★★★★☆☆	★★☆☆☆☆	★★☆☆☆☆	★★★★☆☆
<b>Usability</b>					
Full Web Interface	✓	✓	✓	✓	✓
Mobile App	✓	✓	✓	✓	✓ <sup>2</sup>
Android Offline App	✓	✓	✓	✗	✓
iPhone Offline App	✓	✓	✓	✗	✗
Multi-language	✓	✓	✓	✓	✓
<b>Interfaces</b>					
API	✓	✓	✓		✓
Apps Store	1,000 Apps	✗	179 Apps	✗	7,300 Apps <sup>3</sup>

1 The brand visibility is measured by Google Trends, measuring the number of searches on brand keywords

2 Scheduled for release with v10

3 Since Odoo covers lots of business needs, not all the 7,300 apps are related to CRM

# User Interface

When it comes to efficiency and end-user satisfaction, fine-tuned usability is one of the most important factors in any software platform. In order to provide a strong value proposition, a CRM solution must take into account the needs and goals of its users in order to actively help them achieve their objectives. The user interface supports the overall product design in deciphering human factors such as preferences, habits, and learned skills in order to effectively serve the intended purpose of the software as it relates to the businesses that utilize it. A strongly functional design is critical in providing a positive user experience.

Usability is qualitatively measured as a software's ability to anticipate what a user might need to do. This includes ensuring that all of the elements in the interface are easy to access, understand, and use. Well designed software will provide usability that helps the users feel comfortable with the system and obtaining their unique desired results. It will help users perform actions quickly and become more efficient in their day to day tasks. Best practices also suggest having a simple interface with consistency (common elements) and a page layout based on hierarchical importance and flow.

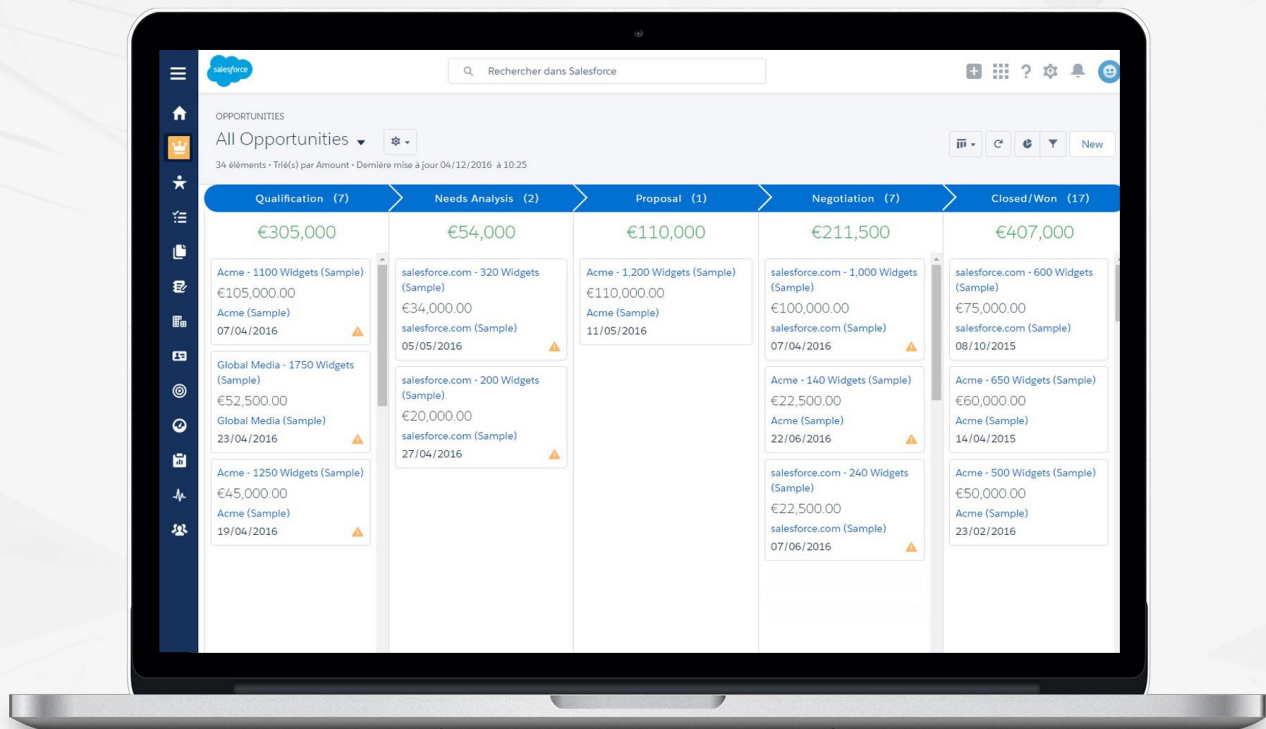
Usability	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
Subjective Ratings					
Navigation and Search	★★★★☆	★★★★☆	★★★★☆	★★★★★	★★★★☆
Opportunities Pipeline	★★★★☆	★☆☆☆☆	★☆☆☆☆	★★★★★	★★★★★
Mobile App	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆
Reports Flexibility	★★★★☆	★★☆☆☆	★★★★☆	★★★★☆ <sup>2</sup>	★★★★☆
Speed/Page Reloads <sup>1</sup>	★★★★☆	★★☆☆☆	★★☆☆☆	★★★★☆	★★★★★
User Satisfaction					
Ratings on g2Crowd	4.1 / 5	3.6 / 5	3.2 / 5	4.5 / 5	4.6 / 5
Ratings on GetApp	3.9 / 5	4 / 5	4 / 5	5 / 5	5.0 / 5
Ratings on Capterra	4.5 / 5	4 / 5	4.5 / 5	4.5 / 5	5.0 / 5

The next section includes screenshots to help you compare the user interface, both in the list and form view, for each software in the comparison.

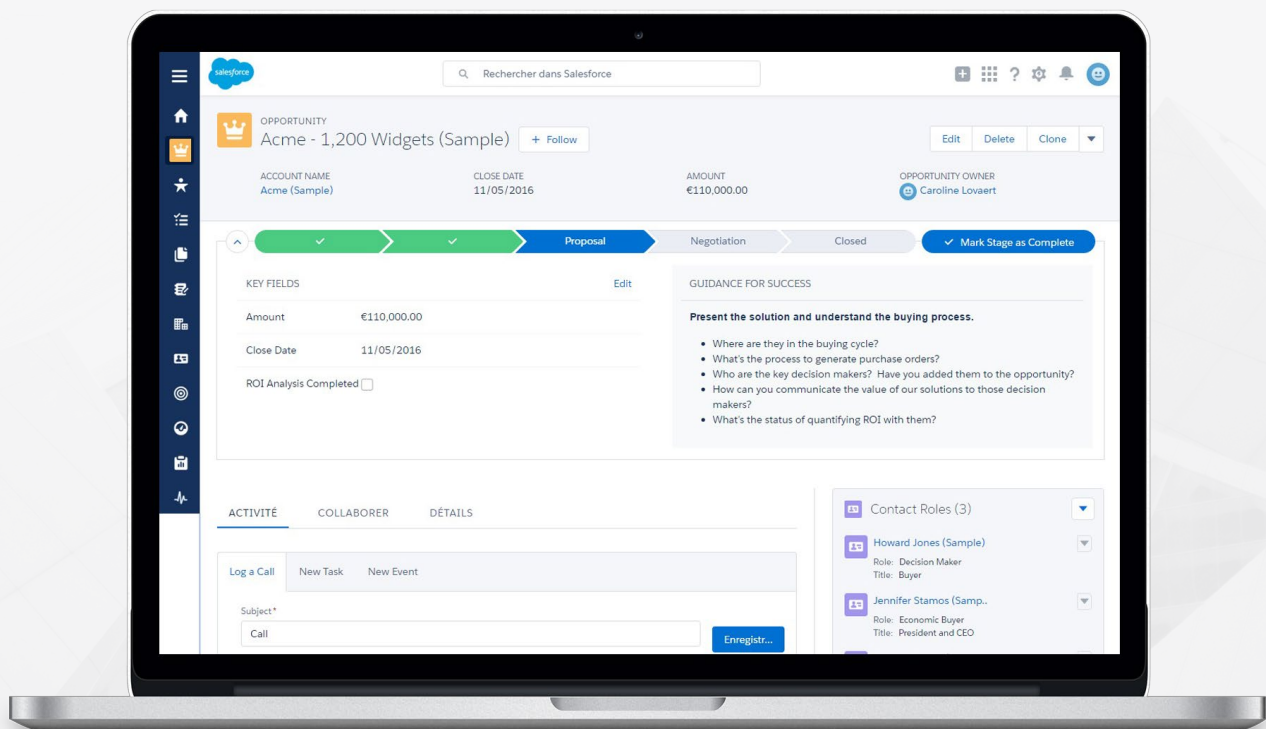
<sup>1</sup> The speed of the applications was measured by the impact of page loads on performance during standard operations

<sup>2</sup> Pipedrive provides great usability in reports, however those reports are limited. On the opposite end of the spectrum, Salesforce has robust reporting features and poor usability. In both cases, each software was given 3 stars for overall quality in reports flexibility.

# User Interface - Salesforce

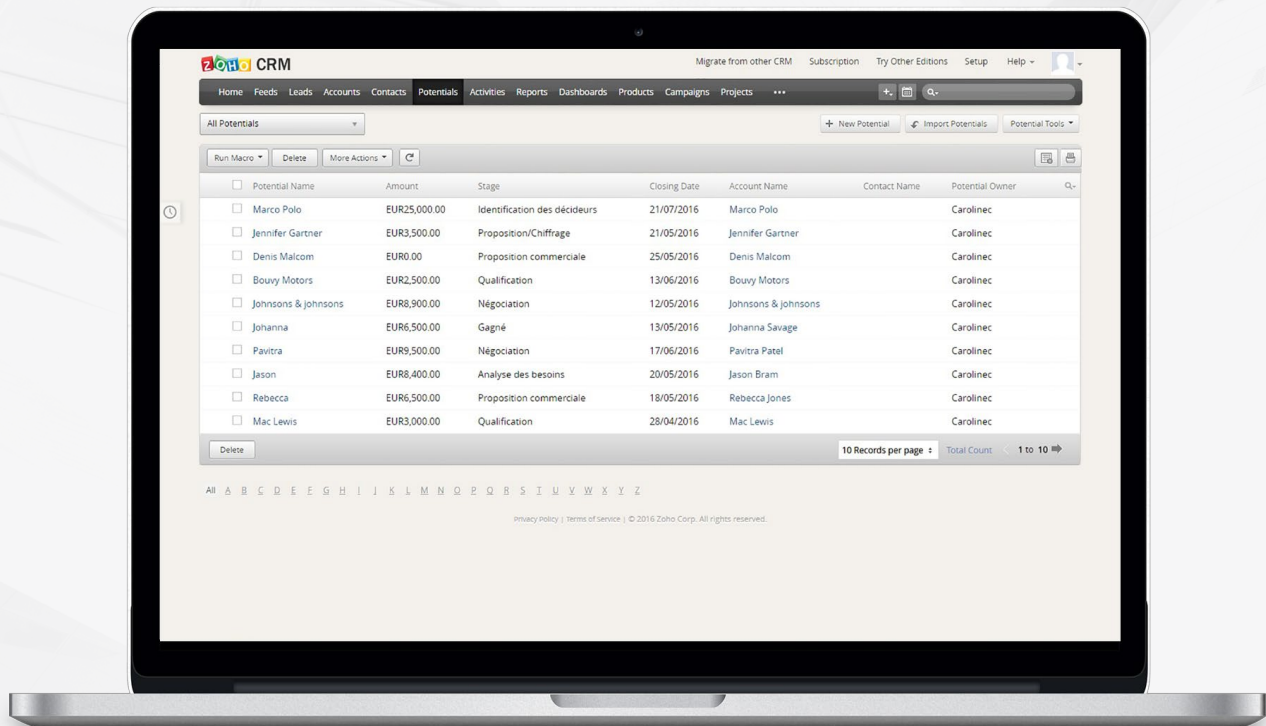


Opportunities - Kanban View

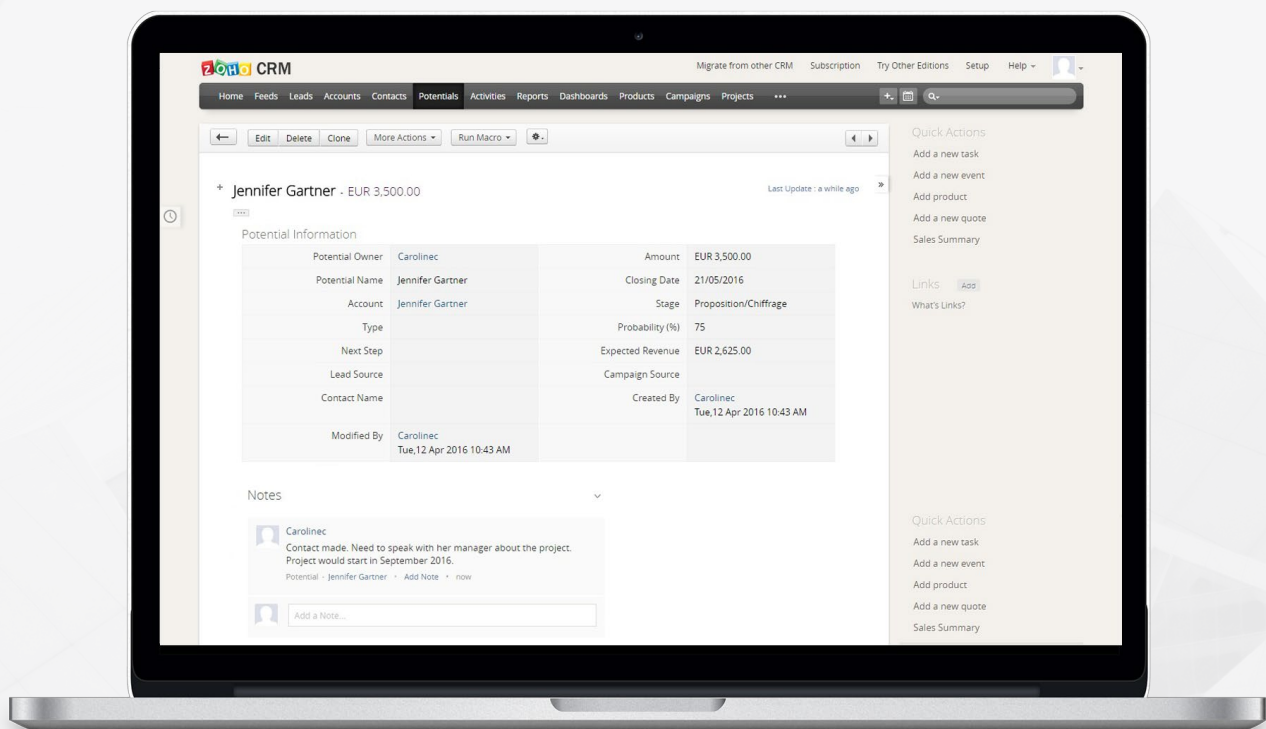


Opportunities - Form View

# User Interface - Zoho CRM



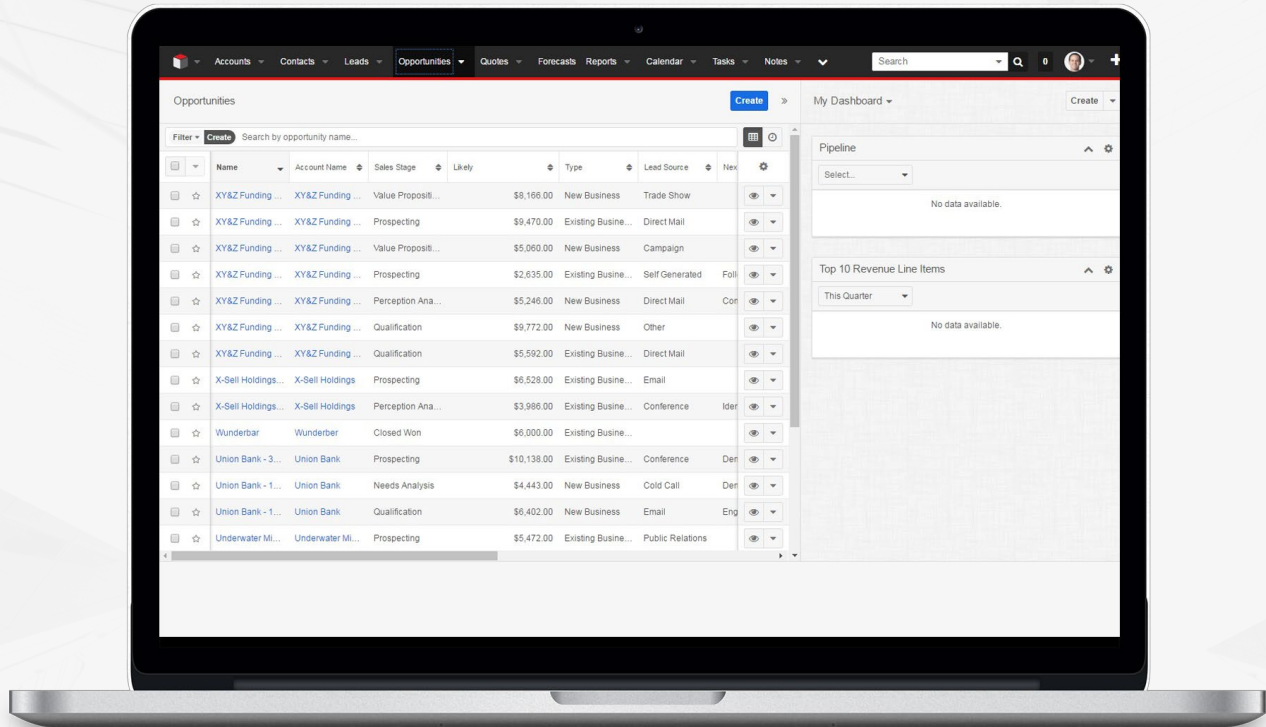
## Opportunities - List View



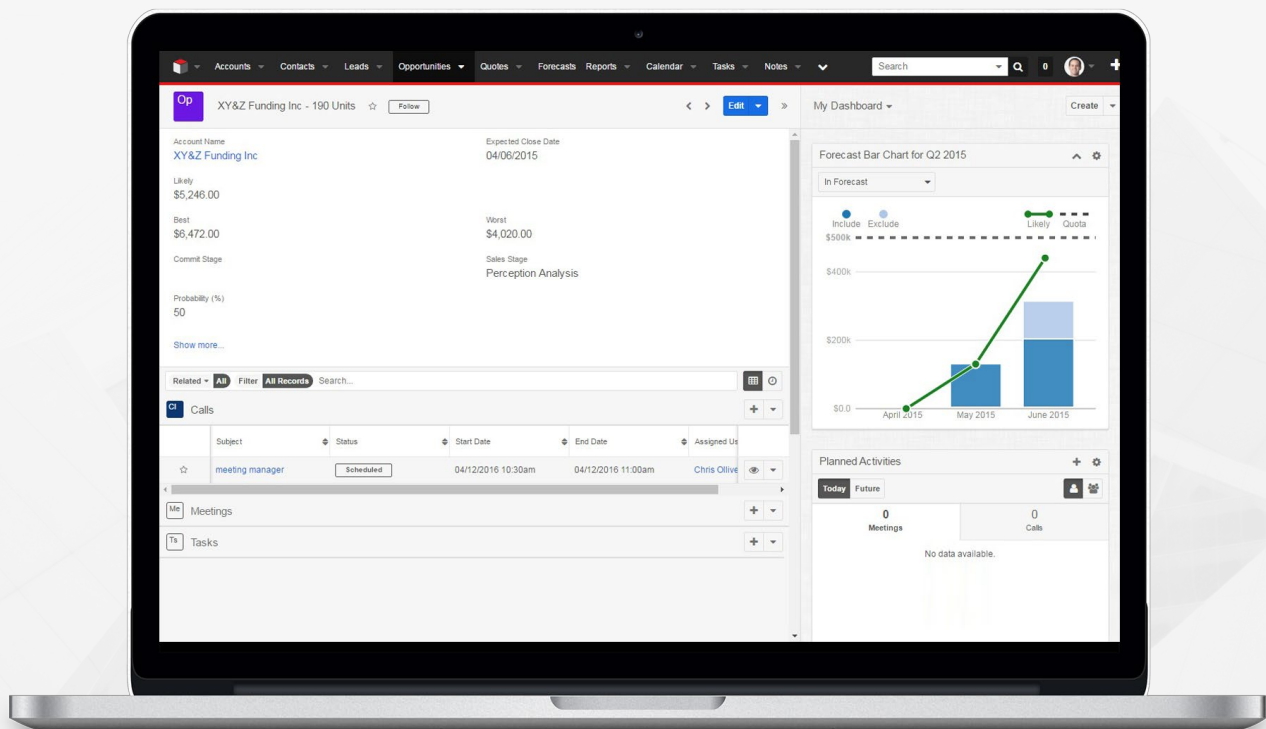
## Opportunities - Form View



# User Interface - SugarCRM

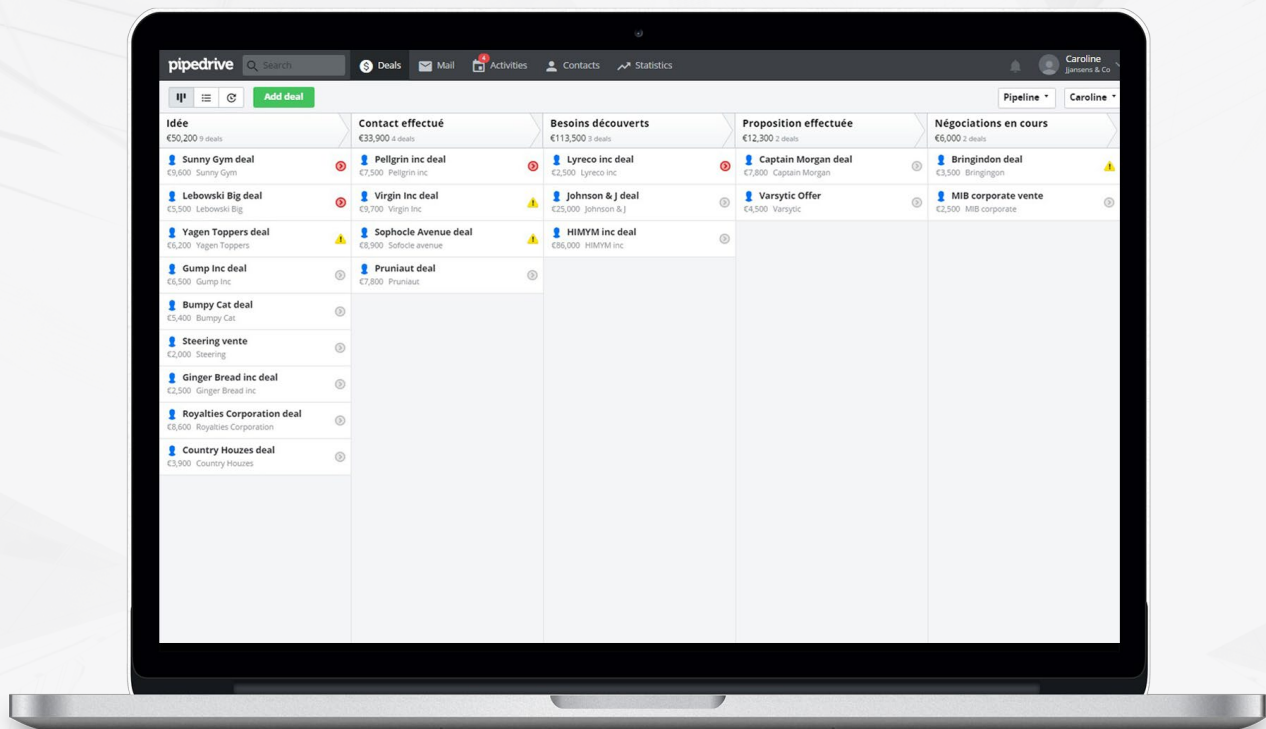


Opportunities - List View

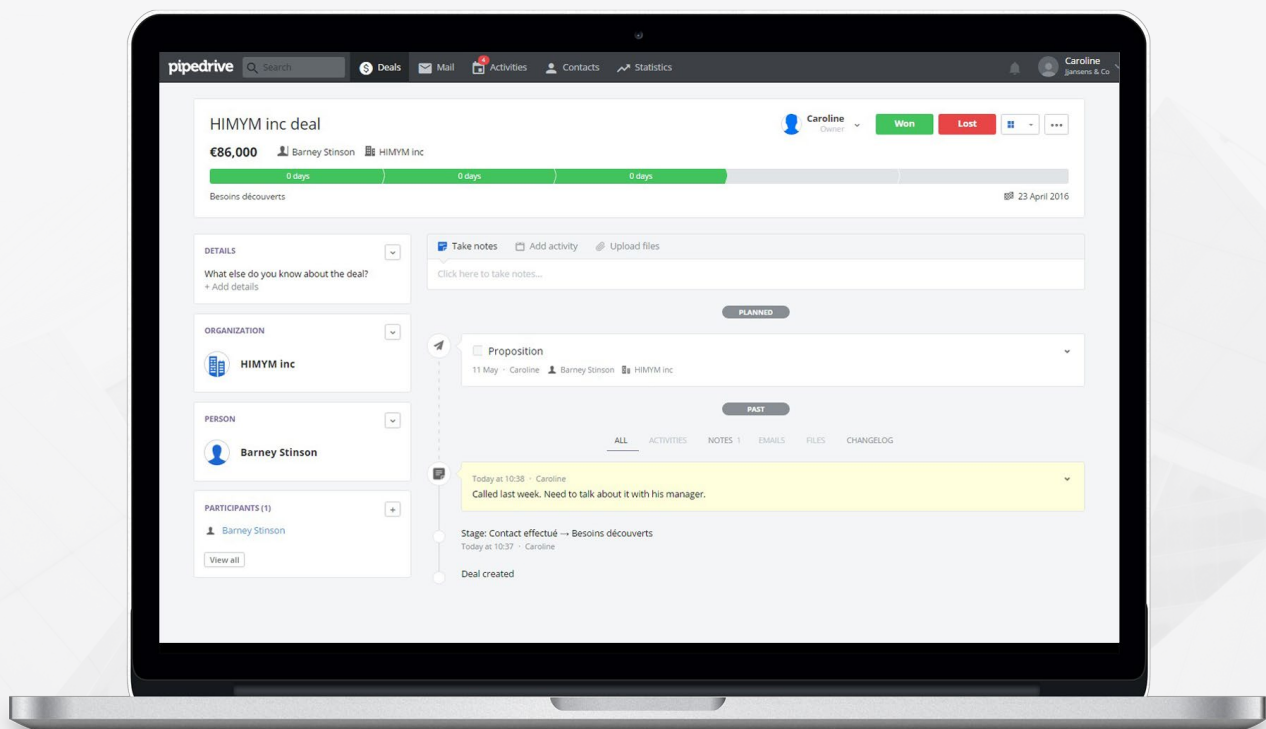


Opportunities - Form View

# User Interface - Pipedrive



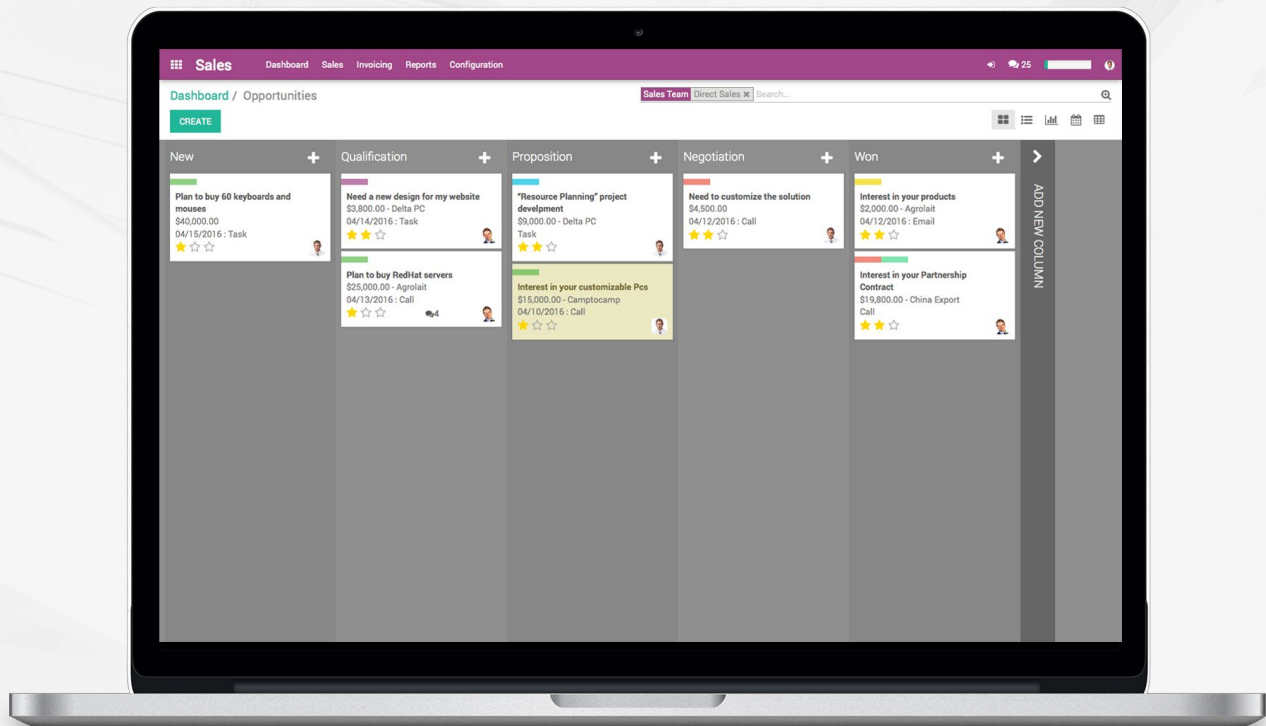
## Opportunities - Kanban View



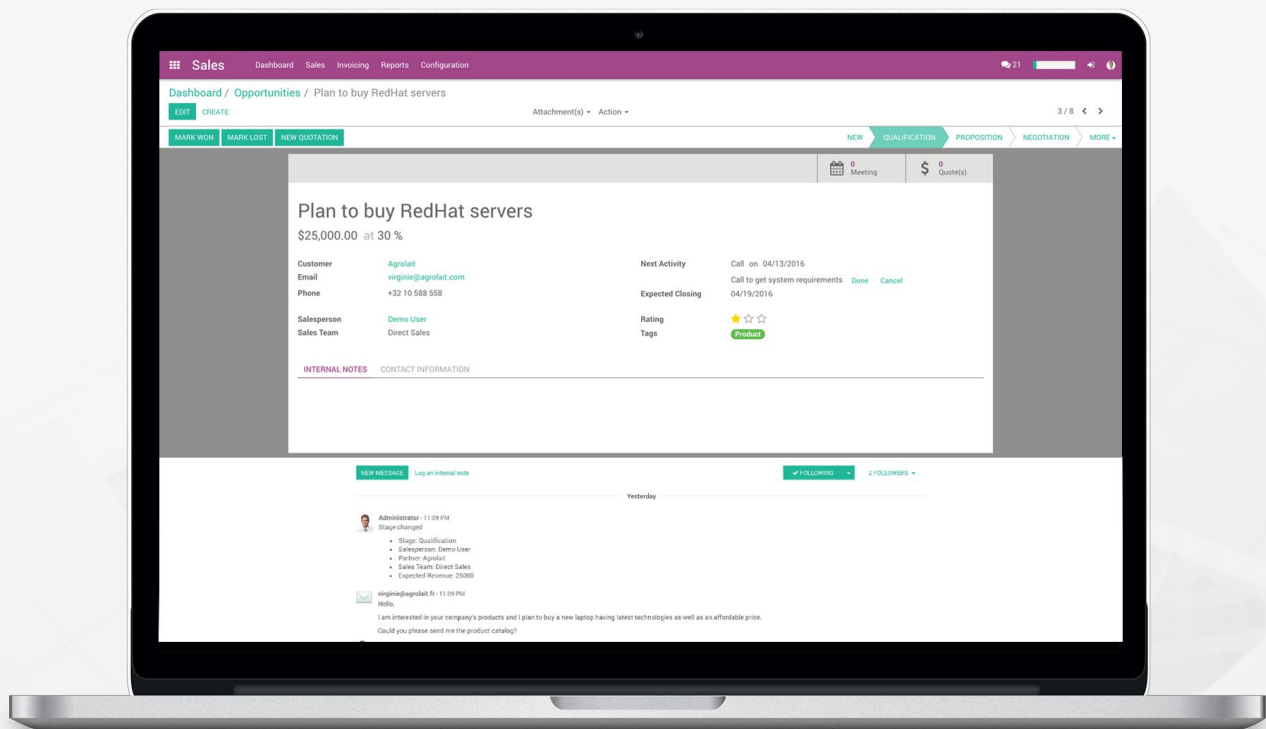
## Opportunities - Form View



# User Interface - Odoo Online



## Opportunities - Kanban View



## Opportunities - Form View

# Pricing & Conditions

Pricing & Conditions	Salesforce CRM Enterprise	Zoho CRM	SugarCRM	Pipedrive	Odoo CRM Online
MONTHLY PRICING	\$125 / User	\$20 / User	\$65 / User <sup>1</sup>	\$12 / User	Free <sup>2</sup>
Contract Duration	Yearly	Monthly or Yearly	Yearly	Monthly	n/a
Free Cloud Version	✓	✗	✗	✗	✓
Free Trial	✓	✓	✓	✓	✓
Free Updates	✓	✓	✓	✓	✓
Upgrades to Future Versions	✓	✓	✗	✓	✓
Hosting & Maintenance	✓	✓	✗	✓	✓
Support	✗ <sup>3</sup>	✗	✓	✓	✓

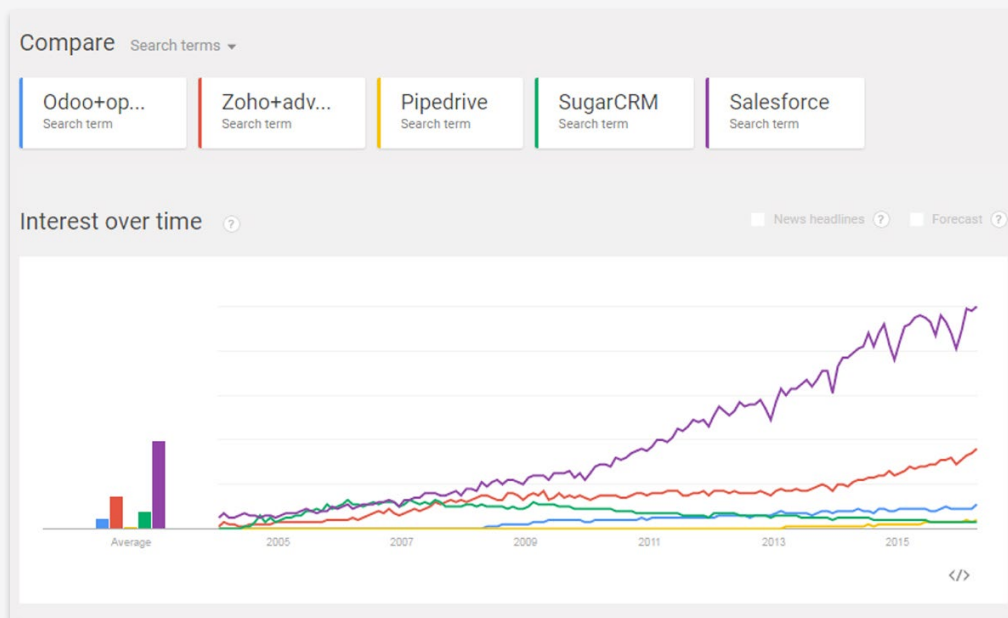
<sup>1</sup> With a minimum of 10 users

<sup>2</sup> Odoo CRM is free for unlimited users, as long as you use solely the CRM app; when other apps are added (ex. Sales, eCommerce, Inventory), the cost is \$25/user

<sup>3</sup> Support is not included in the Enterprise plan, however this is offered in the Unlimited plan at \$250/user

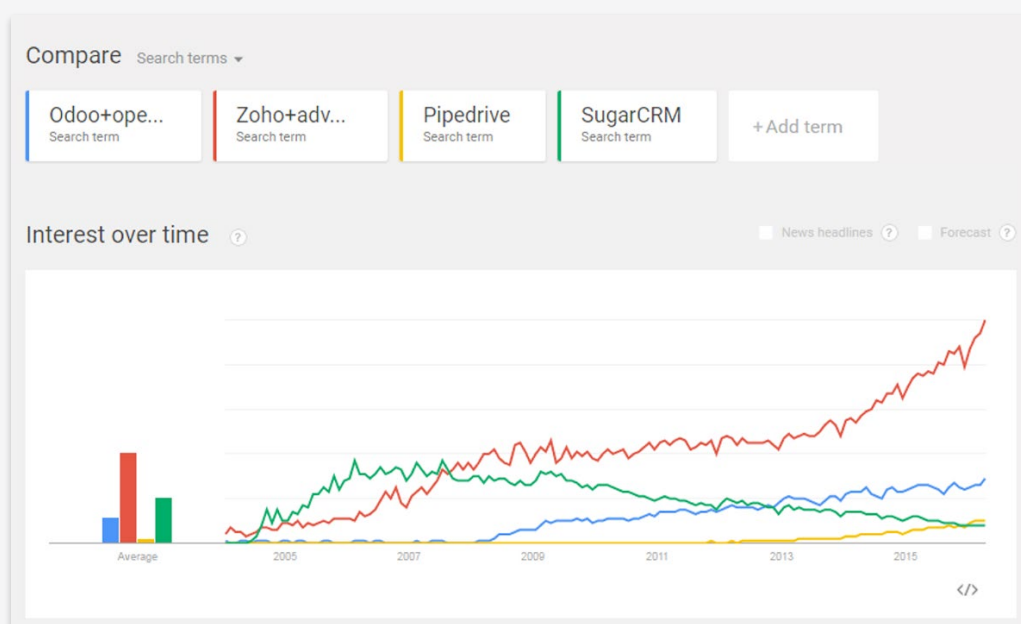
# Market Trends

The following graph was created with the Explore Tool on Google Trends. The color curves show the number of Google searches for the associated keywords<sup>1</sup>. This metric shows the relative consumer interest in each software platform.



Odoo and Zoho are not exclusively CRM-dedicated softwares. Both are business application suites where their CRM app is integrated with the other apps they offer. Search volume on this graph might include non-CRM searches in this regard.

An additional search excluding Salesforce displays a more defined close-up view of the other software platforms in this comparison.



<sup>1</sup> Odoo was formerly known as OpenERP before 2014. Zoho was formerly known as AdventNet before 2009. So both keywords were used for each company to reflect the growth since their initial stages respectively.

# Conclusions

Choosing and implementing a CRM solution is an important decision as well as a significant investment. It should be carefully considered with regards to your unique business needs and operations. If you are in the process of choosing a CRM solution, here are some points to consider before making your decision.

First, be sure to define your objectives. Examples of such objectives could be to get more leads, improve conversion rates, manage your sales teams, upsell to existing customers, etc. Secondly, what type of technology or support does your company prefer to work with? Do you prefer to maintain your software yourself via an on-premise server or utilize a cloud-hosted solution maintained by the software vendor? Additionally, what is your budget and internal competencies? On-premise solutions are preferred by large companies because they provide increased control of the platform and can assist in overcoming security concerns. Alternatively, online solutions are advisable for SME's as the customization and costs (hosting, maintenance, implementation service, etc.) are usually minimal or even included in the base rate.

Once you have weighed the costs and benefits associated with these factors, your business can better analyze the potential solutions available on the market. When comparing the features of each solution, remember to consider the functional needs of the employees using the system in their daily operational tasks. Also, consider the business needs of decision makers in the organization; an optimal solution will support the efforts of all users.

Be sure to pay close attention to the usability of the system you choose. Simplicity contributes to a faster adoption of the software for users, and ultimately allows the salespeople in your organization to be more productive. In terms of usability, Pipedrive and Odoo allow for more advanced features to be learned and adopted quickly compared to the rest of the solutions on the market. Most CRM solutions offer a free trial, so it's easy for businesses to test independently in just a few minutes.

As many CRM experts have mentioned, the future is mobile with integrated solutions supporting multi-channel sales and efficient communication. A mobile tool allows your employees to react quickly to customer requests while an integrated tool can seriously save time, empower users to operate more efficiently, and help maintain a clean, unified database.

Lastly, don't forget to look at the big picture. If a company's long-term goal is to grow its sales volume, the best approach to choosing a CRM solution is to start with a solution that can follow that growth over time. To accomplish this, a flexible solution with robust features that can offer tools which work in tandem with the CRM to manage the business would be the ideal choice for a scalable and cost-effective solution.

# Our Solutions



## Digital Commerce

Integrated eCommerce, digital marketing and sales with automation.



## HR Employee Portal

Quick and easy access to HR-related transactions and services.



## Wholesale Distribution

Specialised wholesale distribution industry solutions.



## Services

Professional and field service management solutions.



## Manufacturing

Flexible, integrated, and extensible manufacturing ERP software.



## Workspace

Email, office, conferencing and cloud solutions.

# Contact information



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