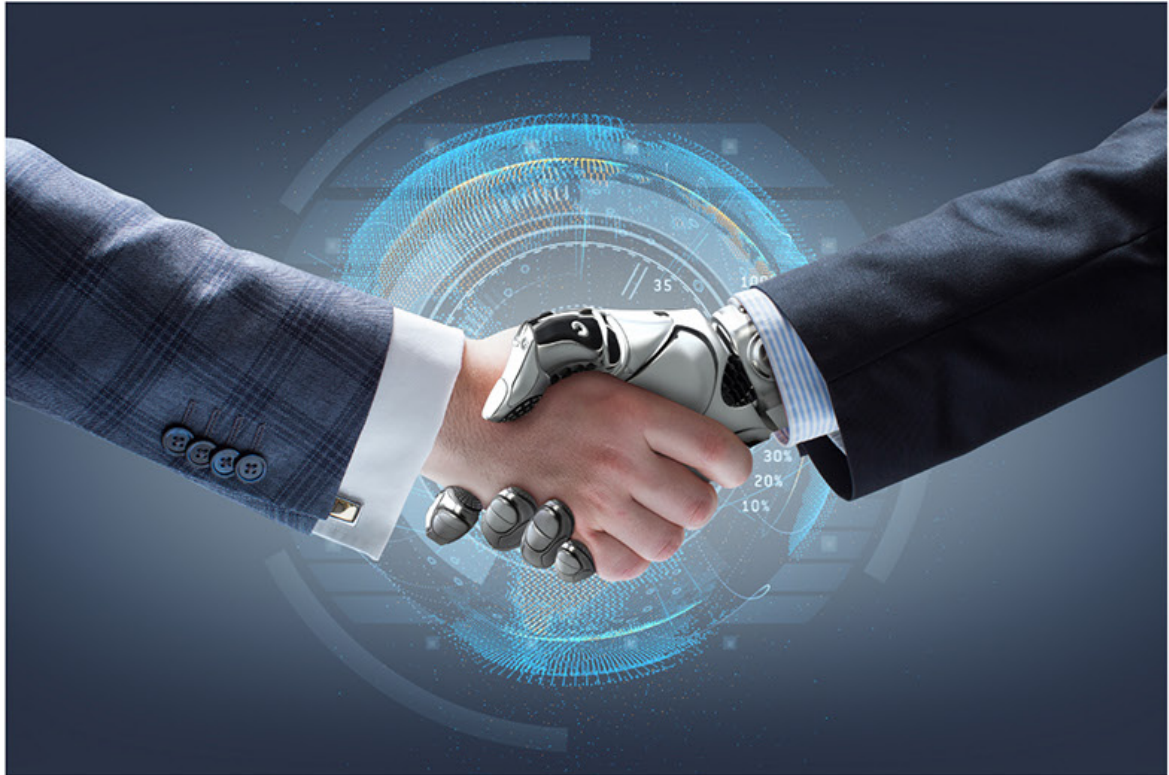# 2017 AI Enabled CRM Review

Introduction: Why use an AI-enabled CRM?

If the term Artificial Intelligence (AI) only makes you think of robots and science fiction – then it's time to delve a little deeper. AI is making its way into many aspects of our everyday lives – such as the spam filter on your email, Siri, Netflix and Facebook. Artificial Intelligence is not only changing the way we live, but also how we work.

AI-based CRM systems have been on the rise. If you work in marketing or sales, chances are you already use some form of Customer Relationship Management (CRM) system – be it an intricate, custom-built application or the address book feature in Outlook. Companies are looking for ways to engage more personally with customers, and increase operational efficiencies – and AI allows you to provide a more personalised experience.

Whatever system you're familiar with, the ability to access and manage leads and automate routine tasks determines how successfully and efficiently your marketing and sales teams manage those all-important client relationships. After all, it's these relationships that determine your brand's potential to grow sales.

While a CRM is used primarily as a database to store information on every interaction a lead or customer has with marketing and sales – from initial touch point on the company website and email, to phone conversations, social media interactions and face-to-face meetings – it actually goes above and beyond this by identifying sales opportunities that a sales team managing a spreadsheet would ordinarily miss.

These platforms ensure that entire marketing and sales teams, regardless of size, are on the same page about every lead and customer. This allows teams to provide a consistent and seamless service to customers and improve their service offering – all factors that influence your team's ability to attract and retain business. AI technologies will not only arm your company with the intelligence to solve your business challenges, but also identify who is most likely to buy your product (based on demographics, past purchase history, etc.)

Since AI-enabled CRM is the way of the future, we've put together this review of six leading CRM systems that use AI technology to help you identify the best tools on the market for managing marketing and sales leads.

1. HUBSPOT

Overview of product

One of the most intuitive CRM systems we've tried, HubSpot CRM really is an out-the-box solution. There's minimal setup and configuration required, and its interface is attractive and easy to use. The system does everything a CRM should do – manage data, log calls, track social media – and there's even a call recording function. It might sound like the perfect solution for small startups, yet its functionality lends itself perfectly to very large organisations too.

HubSpot CRM displays every interaction you've had with a lead – pulled from multiple channels – in a timeline, which means you spend considerably less time and effort trying to keep track of leads in your head. And after adding a new contact or company, the platform allows you to access new data about each of them – data that is automatically enriched by the system. You can also use HubSpot CRM as a repository for all sales content.The downside of the system is that its analytics function can crash unexpectedly, and its reporting isn't as high-powered as other CRMs on the market.

HubSpot ★★★★☆ 4.2 / 5

How HubSpot uses AI

HubSpot uses machine learning to suggest useful topics and detailed metrics for your content strategy. They also make use of predictive lead scoring to ensure that your sales team can focus on the best leads, as well as data enrichment, and personalisation.

Business size & user base

HubSpot is used across the board, from small businesses of 50 employees or less, to enterprise organisations within the marketing and advertising sector, as well as within the IT and computer software sector.

★ Features

- · Quick to install
- · Customisable database
- · Intuitive, easy to use and has an attractive user interface
- · Track deals, schedule follow-ups, send emails and receive a notification when a lead opens an email using the Sidekick app
- · Call recording and tracking feature
- · Excellent customer support and tracking materials

$ Price

- · HubSpot's CRM is completely free
- · Marketing Software from £165/month to £1960/month
- · Sales Software priced at around £42/month per user

+ Pros
- Intuitive and easy to use
- Hubspot CRM is Free
- Automatic data enrichment

— Cons
- Additional features requires extra payment
- Fewer capabilities than other CRMs

2. SALESFORCE

Overview of product

Salesforce – by far the most popular and widely used CRM – brings together information on all lead and customer touch points, helping you gain an in-depth understanding of every customer. The software also includes in-depth analytic and reporting functions.

Salesforce products are broken down into the CRM, customer service, marketing, community, eCommerce and analytics cloud apps (among others), offering a 360o view of the sales and marketing process. The CRM is great for keeping on top of your customer information, spotting sales opportunities, getting more leads and tracking deals. They've recently updated their app and user interface to make them more user friendly. Salesforce integrates with HubSpot's marketing functions and Marketo, amongst other marketing platforms. Usage limits on their features and forced updates are the only drawbacks.

salesforce

★★★★½
4.2 / 5

How Salesforce uses AI

Salesforce uses a great deal of AI technologies. Their artificial intelligent platform, called Einstein, gives third-party developers the ability to add "Einstein intelligence" to applications they build on Salesforce's platform. These include sentiment and intent analysis and sophisticated image recognition tools that can recognise certain attributes and count objects. These features can take advantage of existing customer data in the Salesforce CRM and service databases.

Business size & user base

Salesforce is used predominantly by mid-sized companies of 50–1000 employees within the computer software and IT sectors.

★ Features

· iOS and Android Apps available – view real-time data and reports wherever you are
· Integrates with a range of marketing and other software
· Supported on all major browsers
· Easy to learn and manage – customisable dashboards and drag-and-drop functionality
· Extensive reporting capabilities
· Internal sales collaboration chat app, Chatter
· Access to new prospects and the right data with Data.com

$ Price

· Starts at £23 per month for their Salesforce IQ CRM for up to five users, up to unlimited CRM use and support for £276 per month per user

---

+ Pros
• In-depth analytic and reporting functions
• Upgraded user interface
• Mobile app

– Cons
• Usage limits on certain features
• Forced updates occur to the system

3. MICROSOFT DYNAMICS 365 FOR SALES

Microsoft Dynamics 365

★★★½ 3.4 / 5

Overview of product

A bit like Salesforce, Microsoft Dynamics is broken down into various apps that cover sales, customer service, financials, marketing and operations. You can choose to use an app in isolation or a combination of many, which allows for a great deal of customisation as your marketing and sales needs evolve. The platform makes it easy to manage pipelines, quotas by sales rep or region, customer contracts, marketing automation, forecasting and reporting. It's one of the faster, less cluttered systems out there.

The CRM conveniently integrates with all other Microsoft Office 365 applications, so you can carry out CRM or ERP activities in Outlook and Excel, respectively. It's also possible to tap into many other apps that work alongside the platform, and Microsoft lets you test run these before you commit to buying. That said, there's limited integration potential with non-Microsoft platforms and activities like lead nurturing and follow-ups can't be automated easily. During setup, Microsoft Dynamics expects you to have well-defined sales and marketing processes in place. If you're a smaller business, this might prevent you from making full use of the program.

How Microsoft Dynamics uses AI

Microsoft's solution comes out of the box with loads of built in AI, including lead scoring, demand forecasting and intent analysis. Additionally their cloud infrastructure upgrade allows Azure to run AI and cognitive computing. The system has two stand-alone AI apps: Customer Insights and Relationship Insights. This allows sales teams to effectively manage customer relationships by using predictive intelligence to bring new insights to data.

Business size & user base

Primarily used by mid-sized organisations of up to 1,000 employees within the IT sector. This is a popular platform for information technology and services industry.

★ Features

· Social listening and insights
· Cloud, on-premises or hybrid setup options
· Mobile CRM apps
· CRM online service for anywhere access
· Full integration with Microsoft Office 365

⑨ Price

· Starting at £8 to £87 per month per user for light use of a selection of the Dynamics apps, to $200 per user per month for their EnterPrise 360 Promo package.

+ Pros
- In-depth business intelligence and analytic capabilities
- Extensive customisation possible
- Try apps before you buy

— Cons
- Need a well-defined sales system in place for platform to work correctly
- Advanced search function requires report creation (time consuming)
- Minimal integration with other non-Microsoft platforms

4. SUGAR CRM

Overview of product

Sugar's simple UI makes this CRM extremely easy to learn and use, and everything you need appears on the home page. The reporting features and overall functionality are advanced considering its price point, and it offers a robust search function. The platform includes apps such as calendar, tasks, notes and meetings, so you don't need to incorporate those features from external programs. Sugar's features also help improve team selling and communication, and when it comes to tracking leads in the sales cycle, it's excellent. What's more, you can distinguish leads from opportunities, and assign probabilities to each.

Not so intuitive is the fact that leads remain in the system even after they've converted, and all conversions must be done individually. Its overall performance and automatic updates can be slow. While the software is highly customisable, it's not quite an out-the-box CRM and will require a bit of work to set up for your specific needs.

SUGARCRM ★★★☆ 3.6 / 5

How Sugar uses AI

Sugar's AI technologies help businesses spend less time entering data into their CRM software and more time learning from the data. Sugar uses an AI-powered agent named Candace to combine in-house data with external sources—which will assist users in business-decision making.

Business size & user base

Used predominantly by small to medium-sized companies within the computer software and the information technology and services sector.

★ Features

· Drag and drop functionality
· On-premise or cloud hosting options
· Advanced workflow tools
· Supports more than 26 languages and currencies

💲 Price

· Starts at £32 per user per month for its Sugar Professional package, £52 for the Enterprise package, and £120 for its largest package, Sugar Ultimate

➕ Pros
- Open source platform – high customisation potential without additional costs
- Great collaboration functionality
- Robust search function

➖ Cons
- Plug-ins and integrations not as advanced as larger CRM platforms on the market
- Slow and unreliable at times

5. SAGE

Overview of product

Sage's CRM is a brilliant value-for-money platform that allows for the easy automation of workflows across sales, marketing and support. The UI is intuitive and, when used alongside Sage ERP, allows for advanced functionality. Sage offers an out-the-box CRM that delivers value quickly.

The CRM has a good alignment with social and tells you which leads to work on and when, which is great if your sales teams need a productivity boost. You can also track the performance of sales activities with its Sales KPIs. The CRM is great for marketers, as you can manage campaigns across multiple channels. You can also integrate MailChimp with the CRM, making it easy to send out drip campaigns and track click and open rates.

3.4 / 5

How Sage uses AI

Sage CRM provides deeper insights into each customer and helps businesses become smarter and more predictive about their customers.

Business size & user base:

Used by small to medium sized businesses in the information technology and services sector.

★ Features

· Operates in 24 countries
· Integration with Outlook, SharePoint and MailChimp
· Out-the-box sales reporting
· Mobile apps for Android, iOS and Windows 8
· Export to Excel function for sales forecasts

ⓢ Price

· Sage offers two price tiers – the Cloud CRM package and the more expensive on-premise package. For the latter, you pay per server and then an additional licence fee per user. However, prices can vary according to region. For an accurate price, contact Sage.

+ Pros
- Strong sales force automation
- Quick time-to-value
- Value for money

− Cons
- Reporting limited to 5,000 results without upgrading
- Hard to delete obsolete contacts
- Delays to tracking sales in real time

6. ORACLE SIEBEL

Overview of product

Oracle Siebel is a comprehensive CRM that covers every aspect of the sales and marketing process and customer lifecycle. You can access business intelligence based on role and with solutions tailored to 20 industries. The CRM apps are broken down into sales, marketing, service, commerce, social and CRM technology. In the marketing app, you can track and manage email and web marketing, events, campaigns, resources, and access analytics.

Oracle's sales platform is equally thorough, as it lets you manage partners and channels, access analytics and the CRM on the go with its mobile sales platform, which can be accessed online and offline. With the customer order management tool in the commerce function, you can track thousands of product orders and identify up-selling opportunities.

Oracle Siebel supports the deployment, automation and best practice (to name a few) of all of its other CRM apps, which can't be said for most other CRM options on the market. With such an extensive number of functions in this CRM, this is definitely needed. But with such an array of functions comes a complex pricing structure, and using the entire suite of tools is extremely costly. The UI isn't as attractive as other CRMs either, and with so many different functions, the platform can be tricky to use.

★★★☆☆
3.3 / 5

How Oracle Siebel uses AI

Oracle has AI-driven capabilities across its Customer Experience Cloud Suite. Their AI algorithms work with machine learning to improve product outcomes when taking advantage of the Adaptive Intelligence Tools.

Business size & user base:

Siebel is used mostly by enterprise-size organisations of 1,000 employees or more, across multiple industries by any customer-facing department.

★ Features

· Social Relationship Management (SRM) cloud services
· CRM technology function to support all Siebel CRM apps
· Out-the-box and customisable features
· On-premise or cloud options

⑤ Price

· Siebel's pricing structure is quite different to that of other CRMs. One must first licence a Siebel CRM base per user, and then pay a licence fee for each additional tool or function. The cost of a CRM base per user starts at around £2925.35. Make sure you know exactly what you need before investing in this CRM, as there are many additional add ons that can go with the base platform. For a more detailed breakdown of prices, refer to Siebel's price list.

+ Pros
- Complete CRM system
- Industry-specific offerings
- Strong workflow engine
- Open architecture and multiple OS options

— Cons
- Expensive
- 24/7 customer support and updates available for Premium users only
- Complex and prone to crashes

AI for CRM is designed to help organisations become smarter and more predictive about their customers. With an effective AI-enabled CRM that helps implement a solid lead generation and lead management strategy, your marketing and sales teams stand the best chance of growing your brand and maximising sales.

Resources and reference sites

User data research carried out by G2 Crowd:

- https://www.g2crowd.com
- https://www.hubspot.com
- https://www.salesforce.com
- https://reviews.financesonline.com/p/salesforce-sales-cloud/
- https://www.microsoft.com
- http://www.sugarcrm.com
- http://www.sagecrm.com
- http://www.oracle.com