



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for KANA Enterprise CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for KANA Enterprise CRM or any of 30 other major CRM applications.

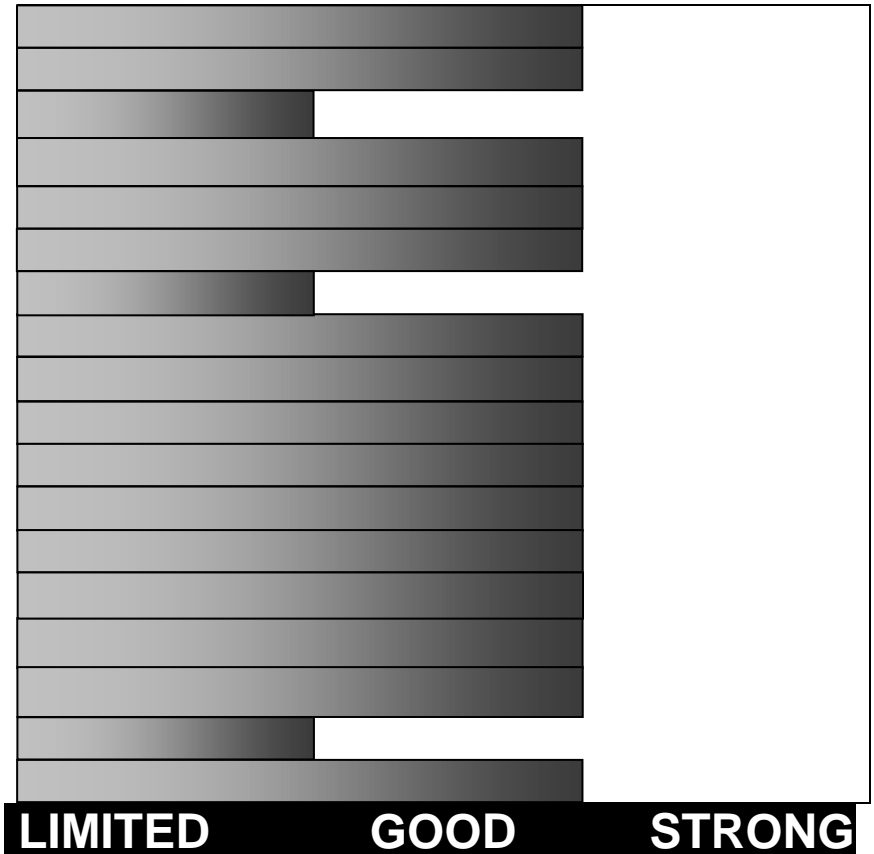
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KANA Enterprise CRM at a Glance:

Business Functions

| | |
|---------------------------|---|
| Contact Management | ✓ |
| Account Management | ✓ |
| Sales Management | ✓ |
| Time Management | ✓ |
| Customer Contact Center | ✓ |
| Customer Service | ✓ |
| Telemarketing/Telesales | ✓ |
| Marketing | ✓ |
| Lead Management | ✓ |
| Business Analytics | ✓ |
| e-Business | ✓ |
| Project Management | ✓ |
| ERM | ✓ |
| Field Service | ✓ |
| Mobile CRM | ✓ |
| Social CRM Functionality | ✓ |
| Real Time Features | ✓ |
| User Friendliness/Support | ✓ |

Evaluation of Business Functions



Strengths:

- Contact profile
- Sales cycle analysis
- Native calendar
- Customer self-service
- Automated email response
- Incident assignment
- iPhone integration
- Product catalogue

Weaknesses:

- Limited sales management
- Limited telemarketing
- Limited real time features

Executive Summary

KANA Enterprise is an on-premise, partner-hosted and SaaS CRM solution targeted to large enterprise organizations. The CRM application has good functionality in contact, account, time, lead, project and employee relationship management, along with good functionality in customer contact center, customer service, field service, marketing, business analytics, e-Business and Social CRM features.

Contact & Account management

Contact management provides for access to a customer profile with predefined fields for customer information. The user can create cases and send emails to customers and contacts. The system administrator can set up security questions to restrict access to customer profiles. For each customer profile, agents can set up and access a Frequently Asked Questions (FAQs) section concerning the particular customer. Account management features include the ability to configure account profiles with user-defined fields for account information. Users can additionally view an account's propensity to buy certain products.

Time management, Customer self-service, Marketing

Time management offers a native KANA CRM calendar with daily and monthly views. Customer self-service enables customers to view and change their relevant contact and account information via User ID and password access over the Internet. Automated standard email templates can be sent to contacts based on the subject of their email messages. The System Administrator can set up default and specific email responses for particular case types. Case profiles with predefined fields and tabs for incident-related information can be accessed by users. The System Administrator can set up the automatic assignment of cases, along with an escalation time period for case types. Field service functionality is available via iPhone integration. Marketing functionality includes the ability to access a product catalog in which users can view product pictures, product descriptions and prices, along with a shopping cart feature and fields for order information.

Lead management, Business analytics, Project management, Social CRM

Lead management includes the ability to assign a lead status to an account or contact and the ability for the System Administrator to customize lead questions for lead qualification. Business analytics features provide for 10 built-in report templates in Crystal Reports format and dashboards. Project and employee relationship management can be easily customized by the customization of fields for this area of functionality. KANA's Social CRM functionality provides for a direct Weblink to the KANA Website for a Developer Network forum for the posting and viewing of topics related to KANA. Users can access mashups of maps from external Websites such as Google Maps on a contact, account or opportunity record. Access to an external wiki database can be embedded on a customer/agent desktop.

Limitations

KANA Enterprise is limited in sales management, telemarketing, knowledge management and real time features.

Contact

| | | | |
|------------------|----------------|----------------|---|
| COMPANY | KANA | ADDRESS | 2550 Walsh Ave, Suite 100 |
| CONTACT | Ryan Zuk | | Santa Clara, CA 95051 |
| TOLL FREE | (800) 737-8738 | EMAIL | Ryan.zuk@verint.com |
| PHONE | (800) 737-8738 | WEBSITE | http://www.kana.com |
| FAX | (408) 830-5411 | | |

Company Profile

| | | | |
|--|--|---------------------------|---------------------|
| YEARS IN BUSINESS | 22 | PRICE – MULTI-USER | See Pricing Section |
| NUMBER OF EMPLOYEES | Vendor Disclosed | SERVER | Vendor Disclosed |
| LICENSED SEAT/USERS SOLD – LAST 12 MONTHS | 7,500+ | | |
| TOTAL NUMBER OF CUSTOMERS | 10,000+ companies | | |
| LANGUAGES AVAILABLE | Arabic, Greek, Portuguese, Chinese (simplified and Traditional), Hebrew, Romanian, Czech, Hungarian, Russian, Danish, Indonesian, Slovak, Dutch, Italian, Spanish, English, Japanese, Swedish, Finnish, Korean, Thai, French, Norwegian, Turkish, German, Polish, Vietnamese | | |
| LIST OF RESELLERS | Wipro, IBM Global Services, Infosys, TATA, Capita, Serco, Sabio, PWC, Resolute and Telestra | | |

Pricing

KANA's price point ranges from \$1500 - \$3000 per agent which reflects the many factors that affect this figure ranging from number of users, concurrency of users and depth of functionality delivered.