



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for OnContact 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 OnContact CRM or any of 30 other major CRM applications.

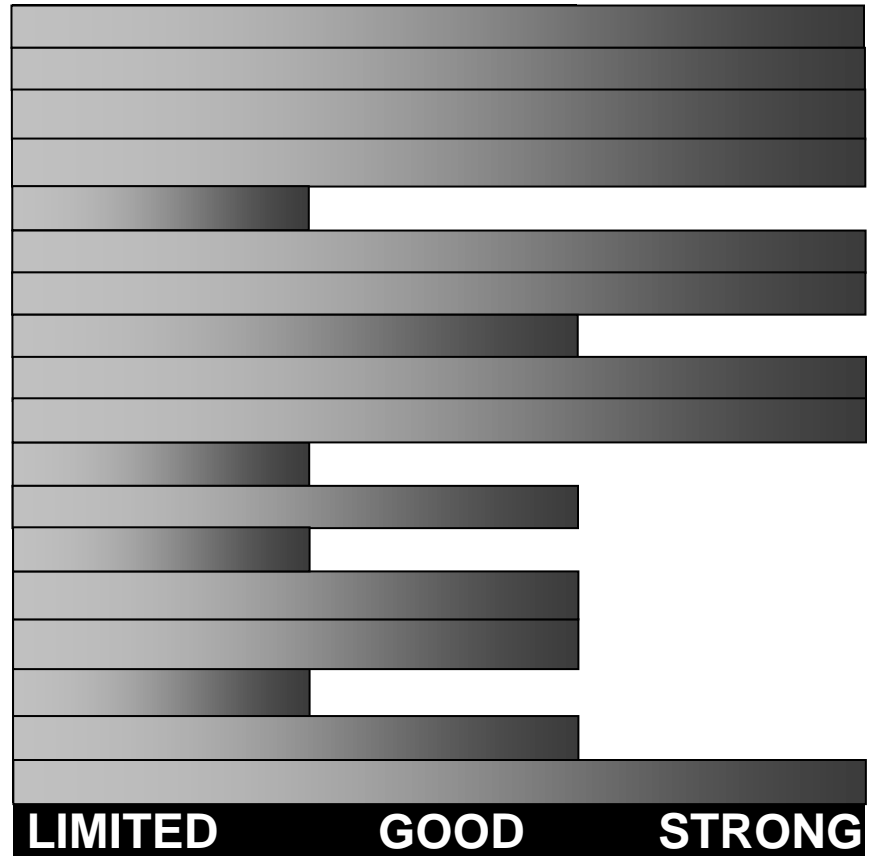
David Badner
301-656-8448
dbadner@ismguide.com

OnContact 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 management
- Account management
- Sales management
- Telemarketing/Telesales
- Time management
- Lead management
- Business analytics
- Customer service
- De-duplication function
- Customizable features
- Configuration
- Customization
- Data Conversion

Weaknesses:

- Limited customer contact center
- Limited e-Business
- Limited employee relationship management
- Lack of interactive calendar

Executive Summary

Oncontact CRM is a Web-enabled enterprise-wide customer relationship management software package that includes strong functionality in the areas of contact, account, sales, time, customer service and lead management, as well as telemarketing/telesales and business analytics. Also, Oncontact CRM offers the user good features in field service, project management, real time features and marketing. Oncontact CRM is an intuitive program and is easy to navigate via tabs, list views with moveable columns and drill down for more detail on line items. Oncontact CRM allows quick and easy access to user-defined screens relating to accounts, contacts or purchase history by using a tab, an icon on the toolbar or a right-mouse click. A Wizards tutorial provides step-by-step process for adding a new contact, account or opportunity to the Oncontact CRM database. In addition, a de-duplication function is available to prevent double entry of contact information. A Merge Document feature is also available to merge documents within the Oncontact CRM database.

Contact management, Account management

All contact and account profiles are enhanced by having a tree-like view available for a hierarchical display of all related contacts within a company, including the title, role and position within an organization. This feature facilitates tracking teams and persons related to an account. Activity Manager allows a user to slice and dice activity information for analysis purposes. Ability to select a time period and view actions (call, Email, etc.) in list format as well as graphic (pie chart) which can be drilled down on. Orders can be entered into a quote feature with pre-defined fields for product, product code, manufacturer, quantity, price, discount and total amount. The vendor claims that quotes can be turned into orders and that orders can be tracked within the back office via integration with third party packages such as MS-Great Plains and SAP R/3. Sales contract generation can be accomplished via merging quote information from the Contract Screen into a sales contract template configured using Crystal Reports.

Sales management

Sales management is enhanced by excellent opportunity management functionality. It is possible to embed a specific sales methodology to qualify an opportunity (e.g., Miller - Heiman, Spin Selling, etc.) and access that methodology from the Method field in an opportunity profile. As each step/milestone for an opportunity is completed, the probability of closing the opportunity is automatically updated. Incomplete action steps can be tracked and Email notification of the incomplete steps can be sent to the appropriate team members.

Time management

Time management tools include a calendar with day/week/month/year views. Group scheduling functionality is provided through bi-directional integration with MS-Outlook. Icons on the calendar indicate if a task is incomplete or closed. The user has the ability to request a notification when an assigned task has been completed. The Email Blast function permits the user to send out a large quantity of personalized Email messages to a list of customers/prospects.

Customer service

The ClientNet portal enables an external user to view relevant contact, account and opportunity profiles via User ID and password access over the Internet. The user has the ability to download literature, search the Knowledge Base, check order status, and track/submit service requests.

Customer service functionality permits a user to search the database for an appropriate method of solving a customer service issue. Product issues can be tracked via the problem tab. The Returned Merchandise Authorization feature permits the user to track any returned merchandise. A power-dialing feature in the Call Management Center can be used in telemarketing efforts to automatically dial the first available number in a calling queue. If there is no answer or the call is completed, the next available number in the queue is then dialed. Call results are also recorded using the Call Management Center. The dynamic branch-scripting feature is also available to assist in the telemarketing efforts. Users can assign calls and attach related files based on pre-defined workflow or triggers.

Marketing management

Marketing features include the ability to create a marketing campaign and track the project size, status and the effectiveness of the campaign through built-in sales metrics (e.g., total cost, total inquiries, cost/opportunity, cost/sales, etc.).

Lead management

The Navigator feature can be used to define a lead management workflow and set up activity agents or triggers to schedule follow-up actions upon the completion of a step in the lead management process. New leads can be generated via a search of various criteria via integration with the Dun & Bradstreet database or any database in ASCII format. Forecasts and other reports are available via Crystal Reports templates, which ship with the package. These tools allow users to create charts (e.g., 2-D, 3-D, bar, pie etc.) to graphically display projected values of opportunities, total expected values, etc.

Customization

Oncontact CRM also offers the user the ability, via the Oncontact CRM Customizer and Oncontact CRM Navigator, to customize the program. These toolkits allow the administrator to make on-line changes that are transferred to the users via synchronization. The Oncontact CRM Customizer permits the user to customize the screen via drag and drop actions. The Oncontact CRM Navigator permits the user to customize the workflow of the program. The addition of a new field can be performed by selecting from an entire database of fields from various applications such as Oracle Financials and SAP R/3.

Limitations

Oncontact CRM is limited in the areas of customer contact center, e-Business, and employee relationship management.



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Contact

COMPANY	Workwise LLC	ADDRESS	N80 W12878 Fond du Lac Ave Menomonee Falls, WI 53051
CONTACT	Jon Zimmerman	EMAIL	Jzimmerman@workwisellc.com
TOLL FREE	(800) 886-0866	WEBSITE	http://www.oncontact.com
PHONE	(262) 345-3671		
FAX	(262) 649-5469		

Company Profile

YEARS IN BUSINESS	23	PRICE – MULTI-USER	See Pricing Section
NUMBER OF EMPLOYEES	100	SERVER	No Charge
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed		
TOTAL NUMBER OF CUSTOMERS	800+ companies		
LANGUAGES AVAILABLE	English, Hebrew, Arabic, Czech, Turkish, Russian, Italian		
LIST OF RESELLERS	Oncontact Software has Certified Business Partner resellers that market, sell, and implement Oncontact CRM in over 30 countries in North America, South America, Europe, Asia, and Australia. A complete list of Certified Business Partners is available from Oncontact Software.		

Pricing

\$59.95 per user per month for hosted or \$1,195 per user for on-premise.