



# CRM Software Review



## About this Review

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

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



Integrated Customer-Centric Strategies

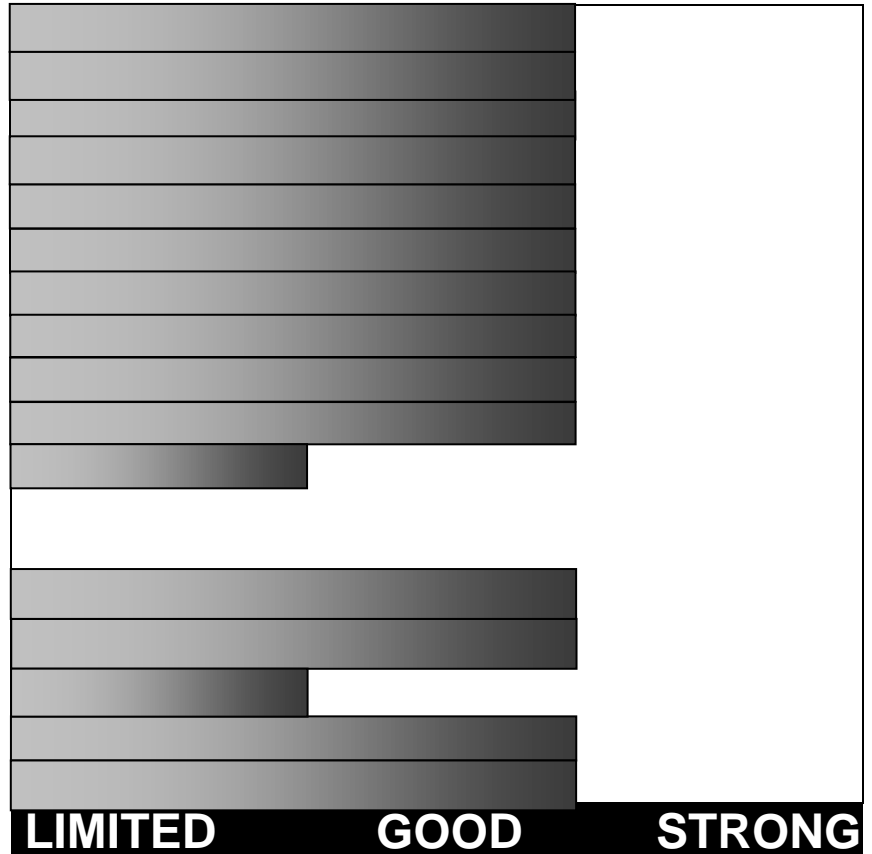
6900 Wisconsin Avenue, Suite 505 Bethesda, MD 20815  
(301) 656.8448 [contact@ismguide.com](mailto:contact@ismguide.com) [www.ismguide.com](http://www.ismguide.com)

## Pega 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:

- Opportunity management
- Sales coaching tips
- Customer self-service
- Incident escalation
- Call profile
- Campaign management
- Predictive modeling tools
- Dashboard/portal interface

### Weaknesses:

- Lack of project management
- Lack of ERM
- Limited knowledge management
- Limited e-Business
- Limited social CRM functionality
- Lack of automated email response

## **Executive Summary**

Pega CRM is an on-premise and Web-based CRM targeted to large enterprise organizations. The CRM application provides for good functionality in the areas of contact management, account management, sales management, time management, customer contact center, customer service, field service, telemarketing, marketing, lead management and business analytics.

## **Contact management, Account management, Opportunity management**

Contact management provides for access to a contact profile with predefined fields for contact information and links to three key social media Websites: Facebook, LinkedIn and Twitter. Account management additionally provides for access to an account profile with predefined fields for account information. Opportunity management provides for access to an opportunity profile with predefined fields for opportunity information. Workflow for an opportunity can be set in a graphical flowchart-type diagram. Specific tactics for an opportunity can be set up. An offer portal can be accessed to view all potential sales offers to a client, view product information, view offer costs/benefits to a prospect and track the progress of the negotiations with a prospect. Sales coaching tips for an opportunity are available and can be set up specifically for an opportunity. Users can collaborate with an expert who serves as a sales coach for an opportunity.

## **Time management, Customer service, Field service, Telemarketing**

Time management offers a native calendar with daily, weekly and monthly views. Customer self-service enables customers to view and change their relevant contact information via User ID and password access over the Internet. Customer service provides for incident profiles and incident escalation functionality. The Expert Assist feature provides expert assistance from the appropriate expert for resolving an incident. Field service is available via mobile device integration. Telemarketing functionality is provided with call profiles for call information. Suggested sales offers for a contact are also available. Skype integration can be accessed for Skype sessions with contacts.

## **Marketing**

Marketing campaign functionality provides for marketing strategies and segmentation. Users can access marketing campaign offers/treatments and personalize the market offer Webpage for a Web marketing campaign. Relevant RSS information feeds concerning a particular marketing campaign/program can also be accessed. Predictive modeling tools to analyze the market effectiveness of tactics and promotions for a marketing campaign are available. Users can run a simulation of 'what if' scenarios and change marketing tactics/variables to determine its effect on a marketing campaign. A visual model to display possible marketing outcomes can additionally be viewed by users.

## **Reporting**

A built-in Pega CRM reporting package offers numerous report templates to customize and use to analyze/display relevant information. Dashboards and portals with lists, charts and links to internal and external information can be customized for users.

## **Limitations**

Pega CRM lacks project and employee relationship management and is limited in e-Business and social CRM functionality.

## Contact

<b>COMPANY</b>	Pegasystems, Inc.	<b>ADDRESS</b>	1 Rogers Street Cambridge, MA 02142
<b>CONTACT</b>	Sean Audet	<b>EMAIL</b>	<a href="mailto:Sean.Audet@pega.com">Sean.Audet@pega.com</a>
<b>TOLL FREE</b>	(800) 414-8064	<b>WEBSITE</b>	<a href="http://www.pega.com">www.pega.com</a>
<b>PHONE</b>	(617) 374 9600		
<b>FAX</b>	(617) 374-9620		

## Company Profile

<b>YEARS IN BUSINESS</b>	32	<b>PRICE – MULTI-USER</b>	Vendor Disclosed
<b>NUMBER OF EMPLOYEES</b>	Vendor Disclosed	<b>SERVER</b>	Vendor Disclosed
<b>LICENSED SEAT/USERS SOLD – LAST 12 MONTHS</b>	100K+		
<b>TOTAL NUMBER OF CUSTOMERS</b>	300 companies		
<b>LANGUAGES AVAILABLE</b>	English (US, UK), Spanish, German, Dutch, Italian, French		
<b>LIST OF RESELLERS</b>	Many resellers are available.		