

Customer Relationship Management Buyers Guide

Software Provider and Product Assessment

**SOFTWARE
PROVIDER
REPORT**

***ISG** Research

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Key Takeaways – Customer Relationship Management

Customer Relationship Management (CRM) provides the operational foundation for managing customer and prospect data across marketing, sales and service. As buying journeys expand across digital channels and subscription models, enterprises require a consistent, real-time view of engagement to coordinate revenue execution and lifecycle management. Today's CRM platforms extend beyond recordkeeping to embed workflow, analytics and AI into daily operations, aligning revenue teams around shared processes and data.

Software Provider Summary

The ISG Buyers Guide™ for Customer Relationship Management evaluates seven software providers offering products that support marketing automation, sales force automation, customer service, AI and analytics, workflow automation and configure, price, quote capabilities. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. HubSpot, Oracle and Salesforce were rated Exemplary, while Microsoft was rated Innovative. Oracle NetSuite, SAP and Zoho were rated Merit.

Product Experience

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), including adaptability, manageability, reliability and usability. Salesforce, Oracle and Microsoft achieved the highest performance as Leaders in this category, supported by comprehensive lifecycle coverage across onboarding, configuration and operations and by robust platform architecture that enables governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, showing strong customer advocacy and a clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should position CRM as a unified architectural foundation for data, workflow and AI across revenue functions. Evaluation should prioritize platform robustness, integration flexibility and governance to reduce technical debt and support evolving business models. Executive alignment across revenue leadership and IT is essential to drive standardized processes, adoption and disciplined revenue management.



Customer Relationship Management

Customer Relationship Management is a foundational layer of enterprise technology that supports the structured management of customer and prospect information across increasingly complex buying and service journeys. As organizations expand across digital channels, subscription models and global markets, the ability to maintain a consistent, real-time view of customer interactions has become critical to revenue execution and long-term value creation.



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CRM provides the operational backbone for coordinating marketing campaigns, managing sales pipelines and delivering post-sale service, while also serving as a shared source of truth that aligns revenue teams around common data and processes. In today's enterprises, CRM is no longer confined to sales force automation; it underpins revenue operations, customer experience strategy and performance management, enabling leaders to connect engagement activity directly to growth, profitability and retention objectives.

ISG Research defines CRM as enterprise software that centralizes and operationalizes customer and prospect data across marketing, sales and service functions to coordinate engagement, manage revenue processes and optimize customer lifecycle outcomes. In today's market, CRM platforms serve as the system of record for customer interactions while increasingly functioning as a system of execution, embedding workflow, analytics and automation into daily operations. Enterprises rely on CRM to align revenue teams, standardize processes and create a shared, trusted

view of the customer that informs strategy and execution across the organization.

Historically, CRM capabilities have centered around three primary domains: marketing, sales and service. Early systems were largely transactional, focused on structured data capture for accounts, contacts and opportunities. Marketing organizations used CRM to support segmentation, campaign management and lead tracking, while sales teams relied on it for pipeline visibility and forecasting. Service teams employed CRM to manage cases and inquiries, contributing to retention and customer satisfaction. Over time, as digital commerce and omnichannel engagement increased, integration requirements grew, prompting CRM providers to expand into workflow automation, low-code configuration and ecosystem connectivity. The addition of artificial intelligence introduced predictive scoring, segmentation optimization and service routing, though these capabilities primarily augmented human



decision-making rather than executing autonomously. The recent emergence of agentic AI marks a further evolution, enabling systems to plan and execute actions within defined parameters, shifting CRM from passive recordkeeping toward active orchestration of revenue and customer engagement processes.

Enterprises require CRM that not only manages information but also improves productivity, forecast accuracy and customer lifetime value. Many organizations continue to operate legacy CRM or sales force automation environments characterized by heavy manual data entry, inconsistent adoption and fragmented integrations. These constraints limit data quality, undermine analytics and drive reliance on spreadsheets and parallel reporting processes.

Enterprises that transform CRM architectures to support AI-driven automation and cross-functional orchestration will achieve measurable improvements in sales productivity, forecast reliability and customer retention compared to those that maintain highly customized, legacy



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deployments. As economic uncertainty places equal emphasis on growth and profitability, CRM must support standardized processes, margin visibility and disciplined revenue management across increasingly complex selling motions. ISG asserts that, through 2027, more than one-half of enterprises will be unable to deploy the latest AI technology to assist sales, partners and customer service, due to outdated CRM and SFA processes and system design, thus limiting revenue growth.

To meet enterprise requirements, CRM software must provide unified data models, embedded workflow automation and extensible integration frameworks that connect marketing, commerce, finance and service systems. Platforms should support automated data capture to reduce user burden, embedded analytics to inform decision-making at the point of action and AI capabilities that move beyond recommendations toward guided or autonomous execution where appropriate. Robust configure, price, quote and pricing management capabilities are increasingly critical as organizations manage multichannel sales, subscription models and complex product portfolios. At the same

time, providers must balance configurability with governance, enabling enterprises to adapt processes without creating excessive technical debt or customization that impedes future innovation. Security, scalability and alignment with provider roadmaps remain essential considerations as enterprises seek long-term platform stability.



Enterprises evaluating CRM should assess not only functional breadth but also architectural flexibility, ecosystem maturity and the provider's AI strategy. Executive sponsorship across revenue leadership, operations and IT is essential to ensure alignment between system capabilities and evolving business models. Organizations should regularly review CRM deployments to minimize redundant tooling, rationalize customizations and adopt new capabilities that enhance efficiency and customer engagement. Those that treat CRM as a strategic coordination layer for revenue and customer lifecycle management, rather than a static system of record, will be better positioned to drive sustainable growth and operational resilience.

The 2026 ISG Buyers Guide™ for Customer Relationship Management evaluates software providers and products in key areas, including marketing automation and lead management, sales force automation and pipeline management, customer service and case management, AI and analytics, workflow automation and integration, and configure, price, quote capabilities. This research evaluates the following software providers: HubSpot, Microsoft, Oracle, Oracle NetSuite, Salesforce, SAP and Zoho.



The Findings – Customer Relationship Management

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider's website, the buying process and the customer journey.

Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in five categories, HubSpot in three and Microsoft in two categories.

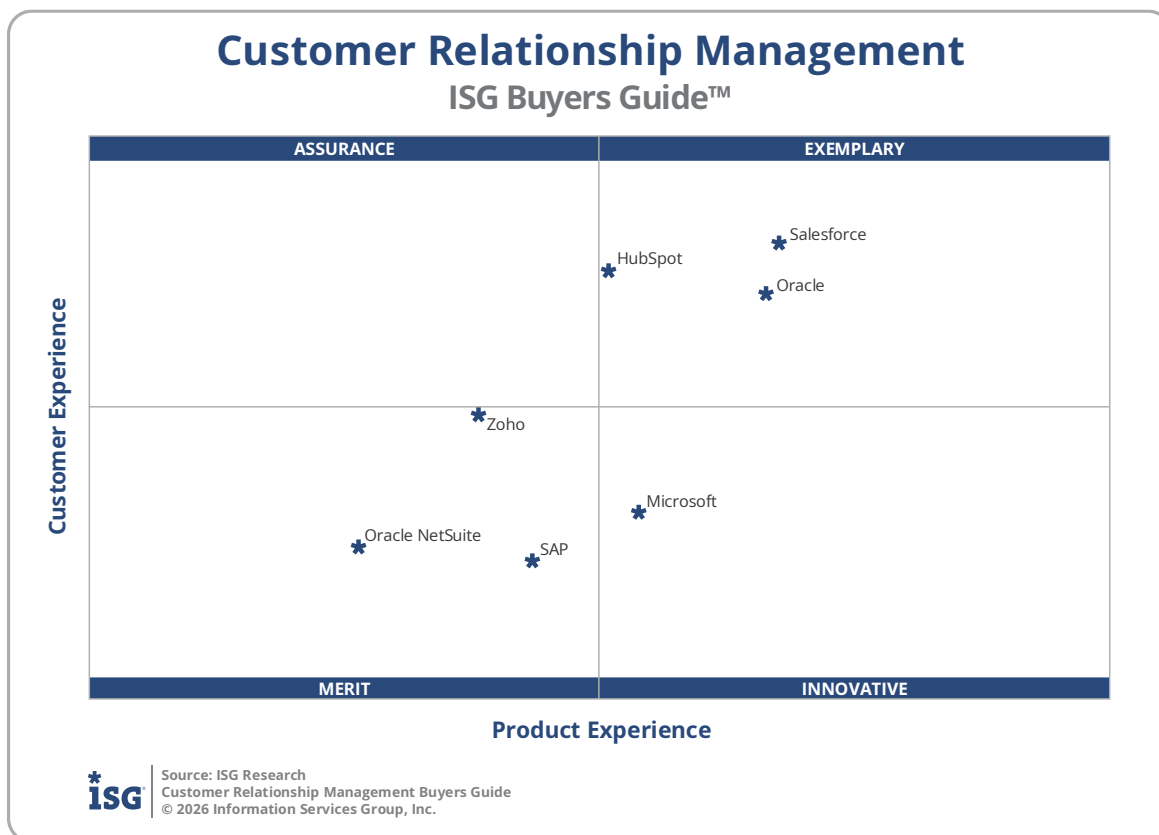
The quadrant chart below presents ratings for Product Experience and Customer Experience on the x- and y-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, place farther to the right. The performance and weighting for the Customer Experience category determine placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Customer Relationship Mgmt. Overall

Providers	Grade	Performance
Salesforce	A-	Leader 83.2%
Oracle	A-	Leader 82.4%
HubSpot	B++	Leader 78.0%
Microsoft	B++	75.2%
Zoho	B+	72.4%
SAP	B+	71.3%
Oracle NetSuite	B	66.3%

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The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. Placement represents the software providers' weighted performance in meeting the requirements of product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: HubSpot, Oracle and Salesforce.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: Microsoft.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. No providers were rated Assurance.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Oracle NetSuite, SAP and Zoho.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent a provider's value nor indicate universal suitability of a set of products.



Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive, evaluating specific capabilities and the underlying platform of the product. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, provider assessments focus on market execution and future vision rather than the full product.

Product Experience accounted for 80% (four-fifths) of the rating based on the underlying weighted performance. The category weighting was 40% for Capability and 40% for Platform. Salesforce, Oracle and Microsoft were designated Product Experience Leaders.

Customer Relationship Mgmt. Product Experience

Providers	Grade	Performance
Salesforce	A-	Leader 66.3%
Oracle	A-	Leader 65.9%
Microsoft	B++	Leader 61.5%
HubSpot	B++	60.4%
SAP	B+	58.4%
Zoho	B+	56.2%
Oracle NetSuite	B	52.6%

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Capability of the Product

The Capability criteria assess the products and features across a broad range of PRM capabilities that support the entire customer journey—from initial interest and marketing engagement, through sales execution, and into customer service and support.

ISG Research evaluated more than 200 functional points across 19 sections to assess the full scope of CRM capabilities. The research weights Capability at 40% of the overall rating. Salesforce, Oracle and Microsoft are the Leaders in this category.

Customer Relationship Mgmt. Capability

Providers	Grade	Performance
Salesforce	A	Leader 88.9%
Oracle	A-	Leader 86.6%
Microsoft	A-	Leader 85.3%
SAP	A-	82.8%
HubSpot	B++	75.0%
Oracle NetSuite	B+	72.6%
Zoho	B	66.8%

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The Capability evaluation for CRM provides a framework for enterprises. Software providers with greater breadth and depth and that support the full set of needs fared better.



Platform of the Product

The Platform category evaluates the underlying requirements of a platform and examines how well a software product meets enterprise needs across business and IT. It measures how effectively the product can be managed, configured and integrated into enterprise environments; how efficiently it can be governed and secured; how reliably it performs and scales; and how intuitively it supports users across varied roles and skill levels. The Platform category in the ISG Buyers Guide examines specific requirements for adaptability, manageability, reliability and usability.


The grading of the underlying platform focuses on a software product’s overall robustness and the flexibility of a provider’s software foundation. Adaptability measures a product’s ability to be customized and integrated across systems and data, while manageability focuses on governance, security and compliance. Reliability considers performance and scalability across environments, and usability assesses how intuitive and accessible the product is through design, AI use and ongoing provider investment.

ISG Research evaluated 16 function points in five sections to assess the full scope of platform capabilities. The research weights Platform at 40% of the overall rating. Oracle, Salesforce and HubSpot are the Leaders in this category.

Platform is an essential evaluation category as it indicates the strength and resilience of a software provider’s product architecture. A well-designed platform ensures secure and compliant operations, dependable scalability and uptime, and a unified, intuitive experience for a range of usage personas. It also reflects the provider’s capacity to support deployment models while maintaining flexibility to meet enterprise demands.

Software providers that performed best in the Platform category have support for the breadth and depth of needs across business and IT, supporting adaptability, manageability, reliability and usability. Providers with lower performance were challenged in one or more of these areas or did not demonstrate a cohesive, enterprise-grade approach. The underlying platform for a software provider’s products is essential in any evaluation.

Providers	Grade	Performance
Oracle	B++	Leader 78.1%
Salesforce	B++	Leader 76.9%
HubSpot	B++	Leader 76.1%
Zoho	B+	73.6%
Microsoft	B	68.5%
SAP	B	63.3%
Oracle NetSuite	B-	58.9%

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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical to ensuring satisfaction with that provider. The ISG Buyers Guide examines a software provider’s customer commitment, viability, customer success, sales and onboarding, product roadmap and partner and support services. The customer experience category also examines TCO/ROI and how well a software provider demonstrates the product’s overall value, costs and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience account for 20% (one-fifth) of the full 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that ranked the highest in the Customer Experience category are Salesforce, HubSpot and Oracle. These category leaders best communicate commitment and dedication to customer needs.

Customer Relationship Mgmt.
Customer Experience

Providers	Grade	Performance
Salesforce	A-	Leader 17.5%
HubSpot	A-	Leader 17.2%
Oracle	A-	Leader 16.9%
Zoho	B++	15.7%
Microsoft	B+	14.7%
Oracle NetSuite	B+	14.3%
SAP	B+	14.0%

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Software providers that did not perform well in this category did not provide sufficient information to demonstrate success or articulate a commitment to customer experience. Partnering with a software provider requires continuous investment, so a holistic evaluation must include examination of the customer experience by providers.



Software Provider Inclusion – Customer Relationship Management

For inclusion in the ISG Buyers Guide™ for Customer Relationship Management in 2026, a software provider must be in good standing financially and ethically, have at least \$70 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 100 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

To be evaluated, the software provider must offer products that include the following capabilities: sales and opportunity management, service and case management, marketing and contact management, partners and partner relationship management, digital commerce, and analytics and reporting.

The research is independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may contain relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market, and it is reflected on the provider's website that the product is within the scope of this research, we automatically evaluate that provider for inclusion.

We invited all software providers offering relevant products and meeting the inclusion requirements to participate in the evaluation process at no cost.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could significantly impact classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
HubSpot	HubSpot CRM	NA	February 2026
Microsoft	Dynamics 365 Sales	2025 release wave 2	October 2025
Oracle	Oracle Sales (Fusion Cloud CX)	26A quarterly update	February 2026
Oracle NetSuite	NetSuite CRM	NetSuite 2026.1	February 2026
Salesforce	Agentforce Sales Agentforce Service Data 360	Spring '26 Release	February 2026
SAP	SAP Sales Cloud (SAP Cloud for Customer)	Release 2602	February 2026
Zoho	Zoho CRM	NA	January 2026



Salesforce

Company and Product Profile

Agentforce Sales, Agentforce Service, Data 360; v. Spring '26 Release, released February 2026
“Salesforce helps organizations of any size become Agentic Enterprises — integrating humans, agents, apps, and data on a trusted, unified platform to unlock unprecedented growth and innovation.” - Salesforce

Summary

Our analysis classified Salesforce as Exemplary, receiving an overall grade of A- with an 83.2% performance. Salesforce's best grouped results came in Customer Experience with an 87.4% performance and an A- grade. In Product Experience, Salesforce received an A- grade with an 82.1% performance. Salesforce was designated a Leader in all categories.

Strengths

Salesforce's primary strength lies in its comprehensive and deeply specialized sales functionality, including advanced capabilities across pipeline management, forecasting, opportunity tracking and performance analytics. These features are highly configurable and designed specifically for sales use cases, enabling organizations to support complex sales processes at scale.

The platform also benefits from a robust and mature ecosystem, including AppExchange and a wide network of partners, which allows organizations to extend core functionality and integrate with a broad range of enterprise systems. This extensibility supports diverse industry requirements and accelerates time-to-value.

Salesforce demonstrates strong innovation in AI and automation, particularly through embedded capabilities that enhance seller productivity, such as predictive insights, automated data capture and AI-assisted recommendations. These tools help sales teams prioritize opportunities, improve forecasting accuracy and streamline day-to-day activities. Salesforce's Agentforce represents a key innovation strength, enabling autonomous AI agents to execute sales and service tasks, enhancing productivity through proactive, context-aware automation.

Challenges

While Salesforce maintains a leading position, organizations may experience increased platform complexity, particularly in environments with extensive customization or multiple integrated solutions. Effectively managing and governing these environments may require dedicated expertise and well-defined operating models.

Customer Relationship Mgmt.		
Salesforce		
Exemplary Provider		
Category	Performance	Grade
Overall	Leader 83.2%	A-
Product	Leader 82.1%	A-
Capability	Leader 88.9%	A
Platform	Leader 76.9%	B++
Customer	Leader 87.4%	A-

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Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide to provide a balanced perspective on software providers and products, rooted in an understanding of business and IT requirements. Utilizing our research methodology and decades of experience, our Buyers Guide is an effective tool for assessing and selecting software providers and



ISG Research has designed the Buyers Guide to provide a balanced perspective on software providers, rooted in an understanding of business and IT requirements.

products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

This ISG Buyers Guide is the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience across capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of enterprise software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to conduct a thorough evaluation, and we offer this ISG Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



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