



Saphyte
ENDLESS POSSIBILITIES

Saphyte Competitor Analysis

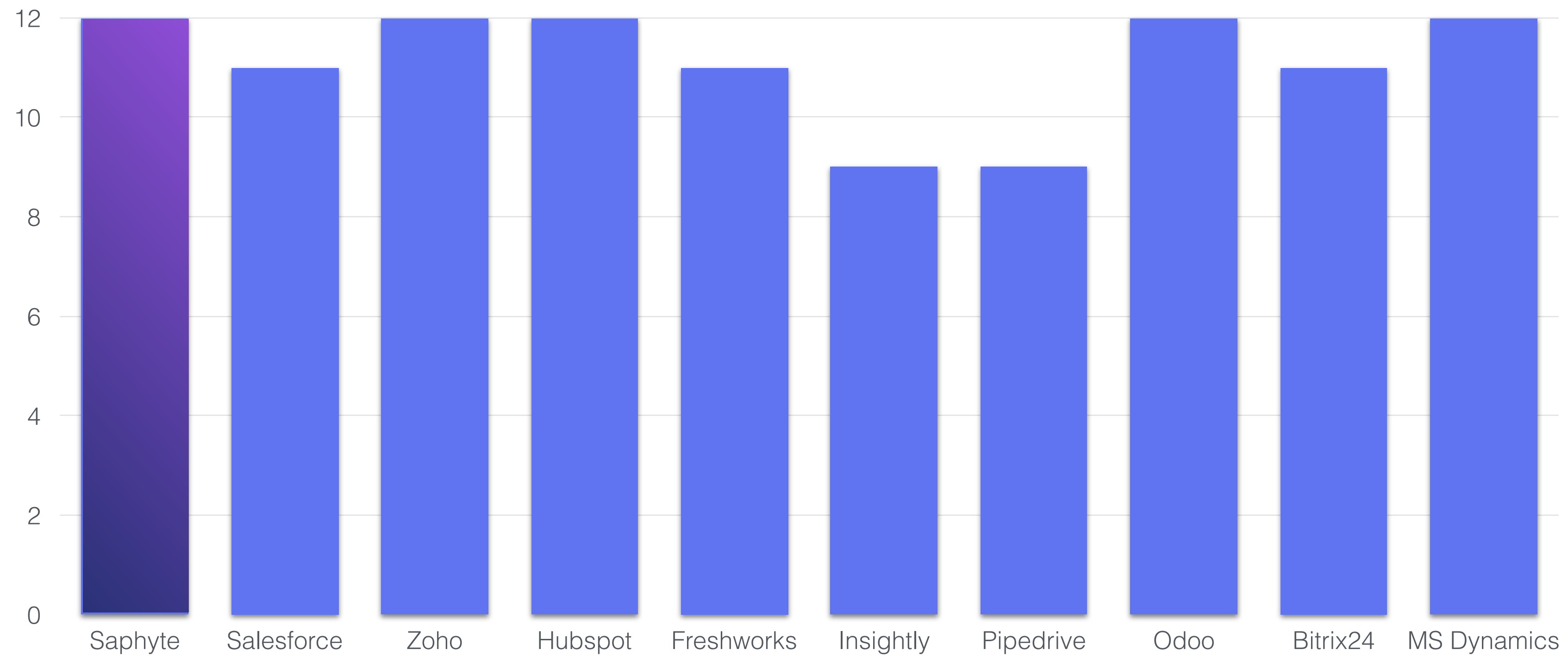
Update: End of Q2. 30th June 2021



Building a strong client network and nurturing business relationships is now made easy with CRM technology. With a competitive marketplace becoming more saturated, it is important to identify major competitors, know their products and services, and to be in tune with their sales and marketing strategies.

For this purpose, a comparison of the main CRM features among nine leading CRM providers were compiled and analyzed to help Saphyte gauge its position and improve its approach. Top features cover Team Management, Workspace Management, Client Management, Sales Management, Marketing Management, Support Management and Tools. The CRM selection and list of features were based on client's feedback during the process of data gathering and implementation

Team Management



When it comes to Team Management, Saphyte fairs equally with Zoho, Hubspot, Odoo, and Microsoft Dynamics garnering 12 out of 12 main features related to team management.

	Team Management	SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Activity Feed	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Customizable Dashboard	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Shareable Dashboard	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Users Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Access Controls/Role-Based Permissions	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Departments	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes
7	Vendors	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No	Yes
8	Team Assignments	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
9	Appointment/Task Reminder System	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
10	Calendar Sync	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
11	Calendar/Appointment Scheduling	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
12	Team Chat / Team Communication	Yes	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes
		12	11	12	12	11	9	9	12	11	12

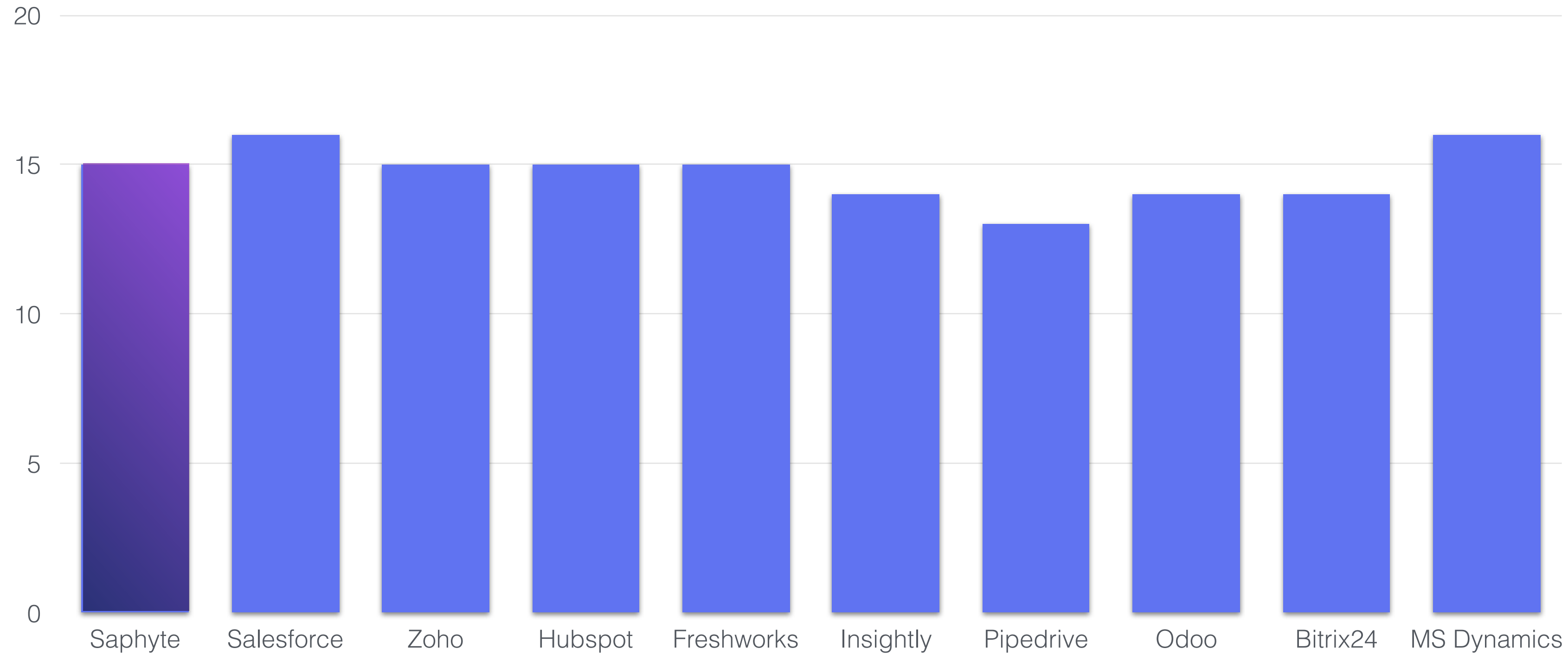


With the lockdown being imposed everywhere, teams are forced to work remotely and the majority of remote workers struggle, especially small businesses that rely heavily on social customer interactions, to gain sales. Now, Customer Relationship Management (CRM) systems play an integral role for companies to stay ahead.

Eleven fundamental Team Management features from some of the leading CRMs were collated and analyzed. Based on the conducted research, data shows that Saphyte's Team Management functionality ranks first, on par with some of the leading CRMs like Salesforce, Zoho, Hubspot, Odoo, and MS Dynamics. This depicts that with today's demand, Saphyte is equally valuable in delivering a CRM system that improves overall collaboration in engaging customers, personalizing services, and improving workforce experience.

As the majority of employees work remotely in the time of pandemic, it is important for businesses to track their workforce's productivity. The Activity Tracking per user is an essential feature that most customers look for in order to track employees activity and performance and Saphyte has this robust functionality (Activity Feed) within its system.

Workspace Management



When it comes to Workspace Management, Saphyte fairs equally with Zoho, Hubspot, and Freshworks having 15 out of 16 main features related to workspace management.

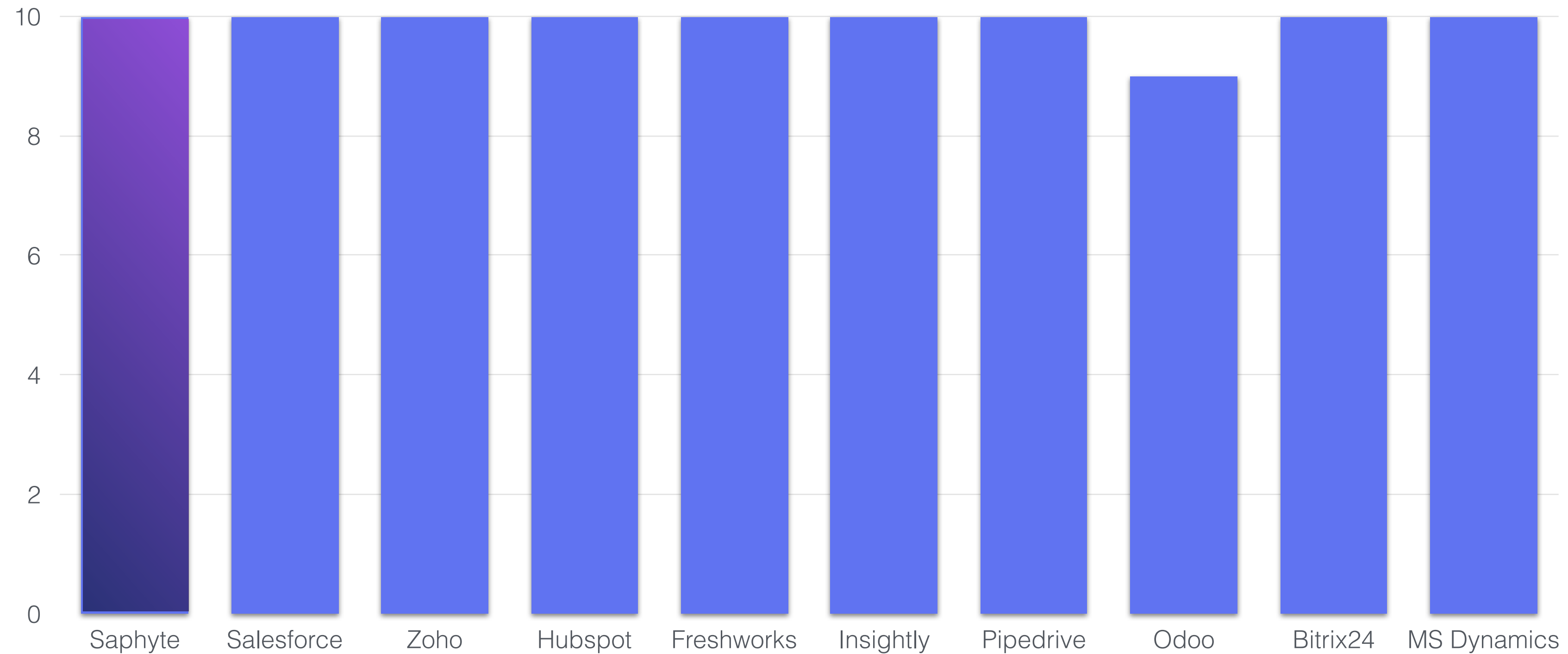
	Workspace Management	SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Alerts/Notifications	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Custom Fields	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Workflow Automation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Form Builder	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Recycle Bin	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes
6	System Logs	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
7	Search & Filters	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
8	Language Translation	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
9	Media Library	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
10	Multiple Currency	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
11	Whitelabel	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
12	Email Sync	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
13	Countries Categories	Yes	Yes	No	No	Yes	No	No	Yes	No	Yes
14	Categorization / Segmentation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
15	Parameterize Field Feature	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes
16	Tag Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		15	16	15	15	15	14	13	14	14	16



We have entered a new era of dealing with business. With the ongoing pandemic that forces us to stay at home and limits our physical and social interactions, Customer Relationship Management (CRM) enables remote teams to collaborate and perform efficiently by having a virtual workspace. To assess the value of Workspace functionality, sixteen main features were reviewed among ten CRMs. The results show that Saphyte is next to Salesforce, at par with Zoho, Hubspot and Freshworks ranking second among the ten CRMs reviewed. The availability of Language Translation with competitors is a differentiator which Saphyte currently doesn't have.

More so, Saphyte needs to strengthen its Documentation Management. Uploading different data formats especially word and pdf of greater storage limitation would be a good improvement to cater business demands. Moreover, Reports, Dashboards Analytics with business intelligence (BI) tools have become some of the top CRM features that Saphyte needs to improve on.

Client Management



When it comes to Client Management, Saphyte has equal competition with its competitors except for Odoo. Saphyte and the majority of the competitors including the big players have 10 out of 10 main features related to Client Management.

Client Management		SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Documentation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Contact Database/Contacts	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Lead Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Lead Generation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Data Import/Export	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Duplicate Detection	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
7	Call History	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
8	Notes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
9	Source Tracking	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
10	Lead Scoring	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		10	10	10	10	10	10	10	9	10	10

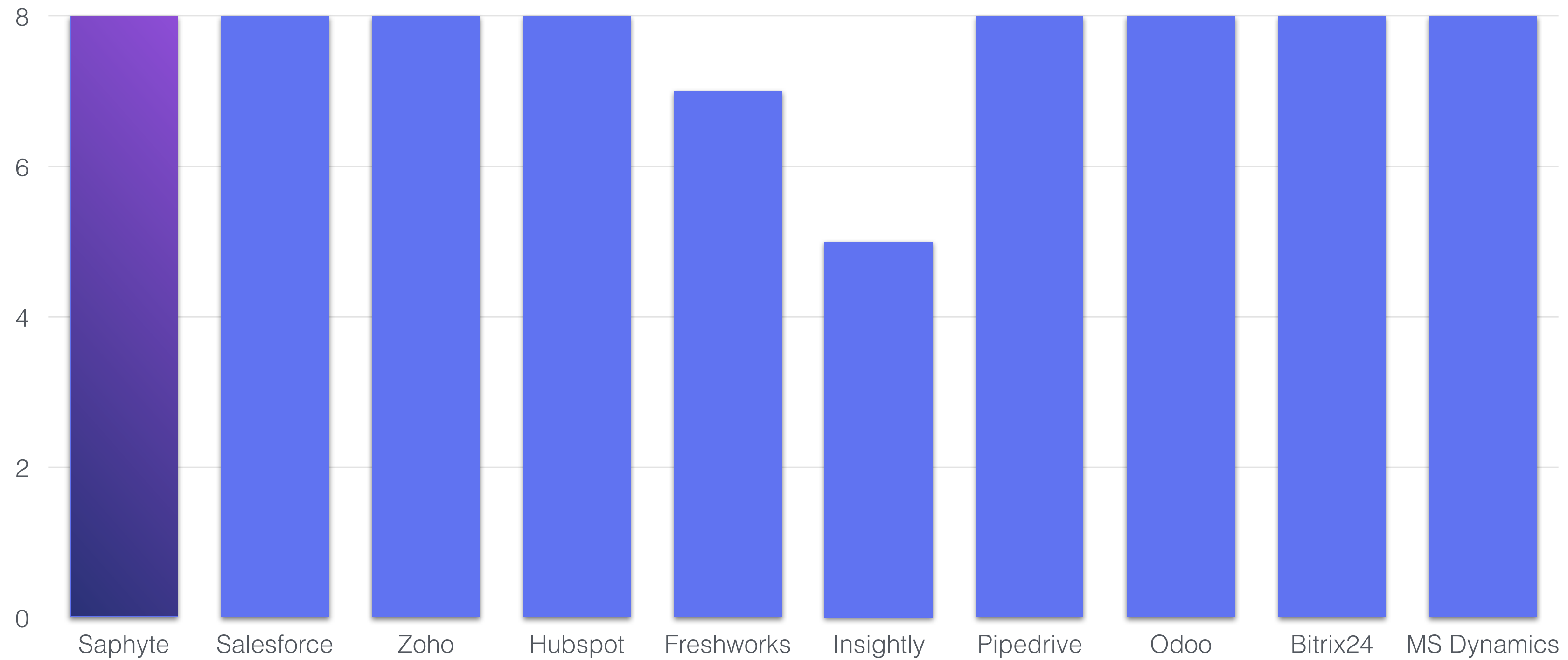


Finding customers for your business is never easy. Once you find them, establishing and maintaining strong relationships with them is another challenge. This is why Saphyte CRM treats “communication journeys” as a priority. Looking into the key features of Client Management, results show that Saphyte has an identical position at the first place with the other leading CRMs like Zoho, Salesforce, Hubspot Pipedrive, Bitrix24, and Microsoft Dynamics 365.

Among the ten top features reviewed, Saphyte’s Client Management feature stands strong, from having a unified contact list that minimizes data redundancy to the accessibility of all customer interactions in one view. The 360 degree Client Management view gives Saphyte a perfect score out of the ten features analyzed.

Learning from competitors, multichannel communication is one of Zoho CRM’s strongest features. This allows their sales representatives to connect with customers on different platforms. The multichannel communication possibility was through Zoho’s partnership with several top business applications including Google Suite, Ring Central, What’s App, Eventbrite, Quickbooks, Proposify, LinkedIn Sales Navigator, Mail Chimp, Facebook, Slack, Dropbox, and SalesIQ. These integrations make it possible to communicate with prospects via email, phone, social media, and live chat.

Sales Management



When it comes to Sales Management, Saphyte has equal competition with its competitors except for Freshworks. Saphyte and the majority of the competitors including the big players have 8 out of 8 main features related to Sales Management.

Sales Management		SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Reports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Deal Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Quotes Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Invoice Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Product Catalog	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
6	Sales Pipeline	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
7	Sales Hierarchy	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
8	Sales Intelligence	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		8	8	8	8	7	8	8	8	8	8

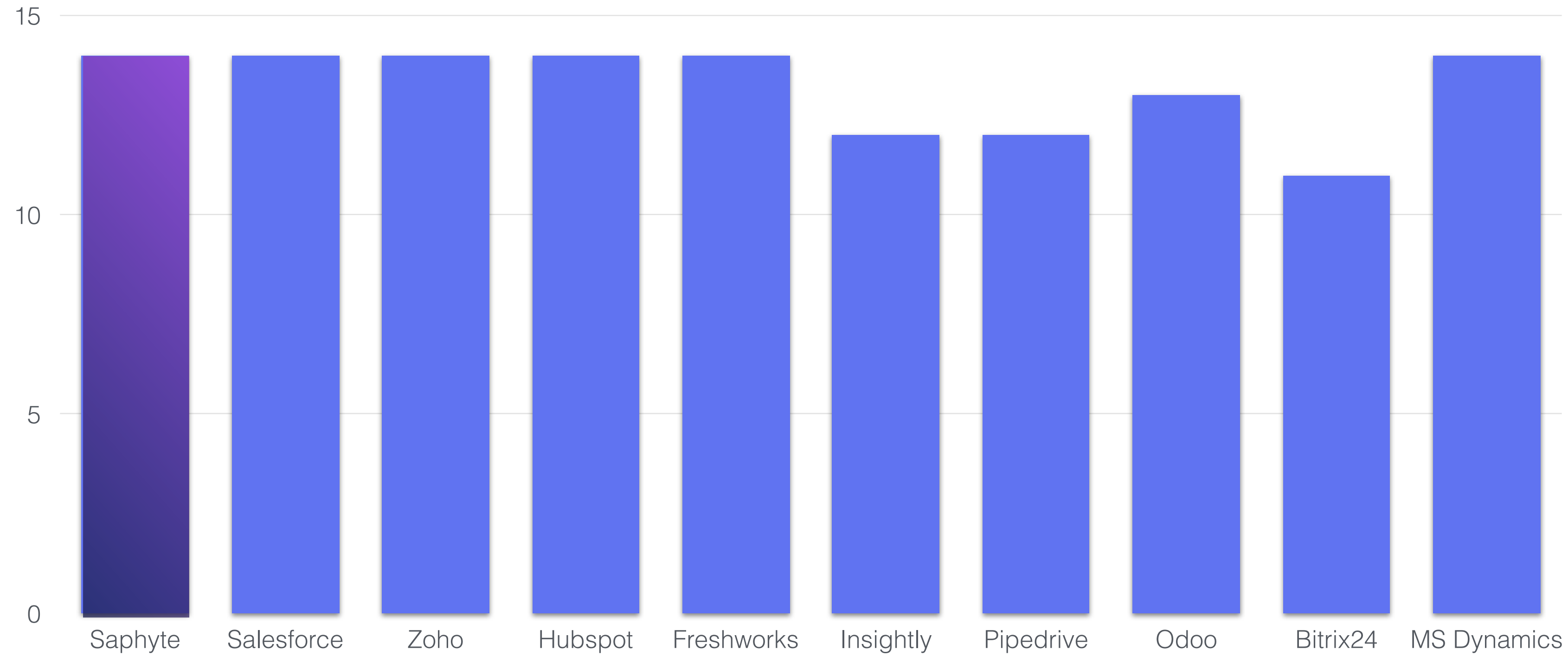


An efficient sales management tool is one of the key factors for a business to succeed. Selling your products all over the web has become more challenging. And out of the top eight Sales Management features analyzed, results show that Saphyte is in equal strength with the other leading CRMs like Zoho, Salesforce, Hubspot Pipedrive, Odoo, Bitrix24, and Microsoft Dynamics 365. Top-rated features analyzed include pipeline management, product catalog management, deals management, quote and invoicing.

Reviewing the competitor's capabilities concludes that Saphyte's Deals Management has an equal standing in providing solutions to demands in the marketplace. Saphyte's sales management components cover a full sales cycle of onboarding, engagement, and nurturing. In today's number game, the market needs a CRM that is designed to gather customer data and information with less manual work. Saphyte is leading the market when it comes to automating workflows and having the ability to create accurate forecasts that could help users make informed, strategic decisions without the need for manual calculations.

On the contrary, to keep up with the competitors, Saphyte's Sales Performance Management module and business intelligence tools - analytics, reporting and dashboards - need further revamping to ace solutions on data-driven business requirements, and to ensure increased productivity.

Marketing Management



When it comes to Marketing Management, Saphyte has equal competition with the big players in the market such as Salesforce, Zoho, Hubspot, Freshworks, and Microsoft Dynamics having 14 out of 14 main features related to Marketing Management.

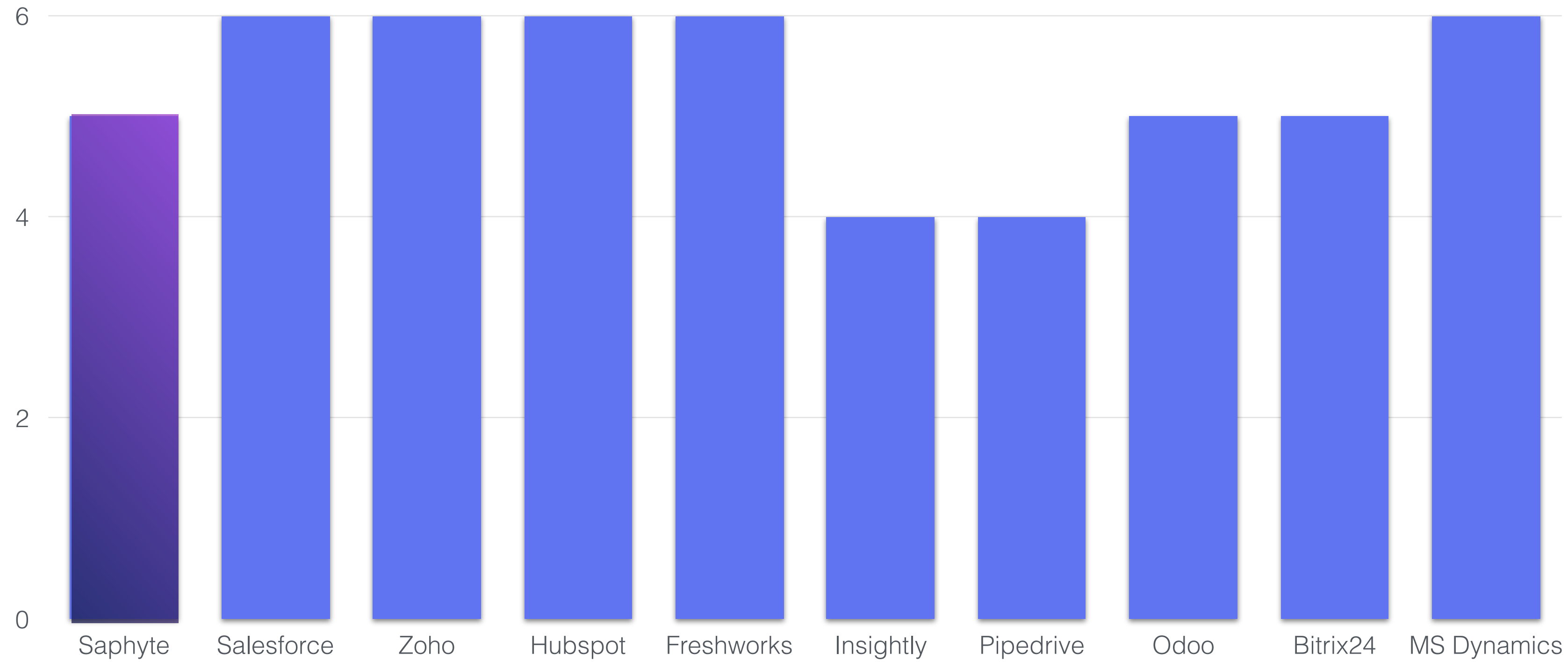
	Marketing Management	SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Marketing Campaign Analytics	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Custom Email Templates	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Auto Responder	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
4	Email Marketing / Drip Campaigns	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Email Status Tracking	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Bulk Emails	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
7	Email Sender	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
8	Email Builder	Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes
9	Campaign Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
10	Subscription List/Management	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
11	Landing Pages	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
12	Web Forms	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
13	System Email Templates	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
14	Referral Tracking	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
		14	14	14	14	14	12	12	13	11	14



Marketing is an essential strategy in acquiring a wider reach. Understanding the market and gearing up to providing solutions that deliver effective marketing tools, positions Saphyte parallel with other big CRM brands. Out of the top fourteen (14) Marketing features, Saphyte got a full mark scoring, which represents that Saphyte has the capability to accelerate marketing strategy.

Conversely, Saphyte's marketing analytics and campaign management needs a boost of improvement. As most businesses are data-driven, having a CRM that provides significant data would be a springboard to insightful decision-making. And as CRM technologies are ever-changing, to keep pace, Saphyte needs to provide a high level of innovative advantage within a multichannel hub - social media integrations that cover platforms like Facebook, Instagram, and Twitter. Scheduling features that would enable clients to be in control, preparing posts and blogs to be uploaded at their own pace and maintaining continuity of their presence would be an edge. Saphyte is looking to develop this feature and launch the next version.

Support Management



When it comes to Support Management, Saphyte ranks second along with Odoo and Bitrix having 5 out of 6 main features related to Support Management.

Marketing Management		SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Support Ticket Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Live Chat	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Telephony	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Client Portal / Self Service Portal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Request Builder	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes
6	Transcripts / Chat History	No	Yes	Yes	Yes	Yes	No	No	No	No	Yes
		5	6	6	6	6	4	4	5	5	6

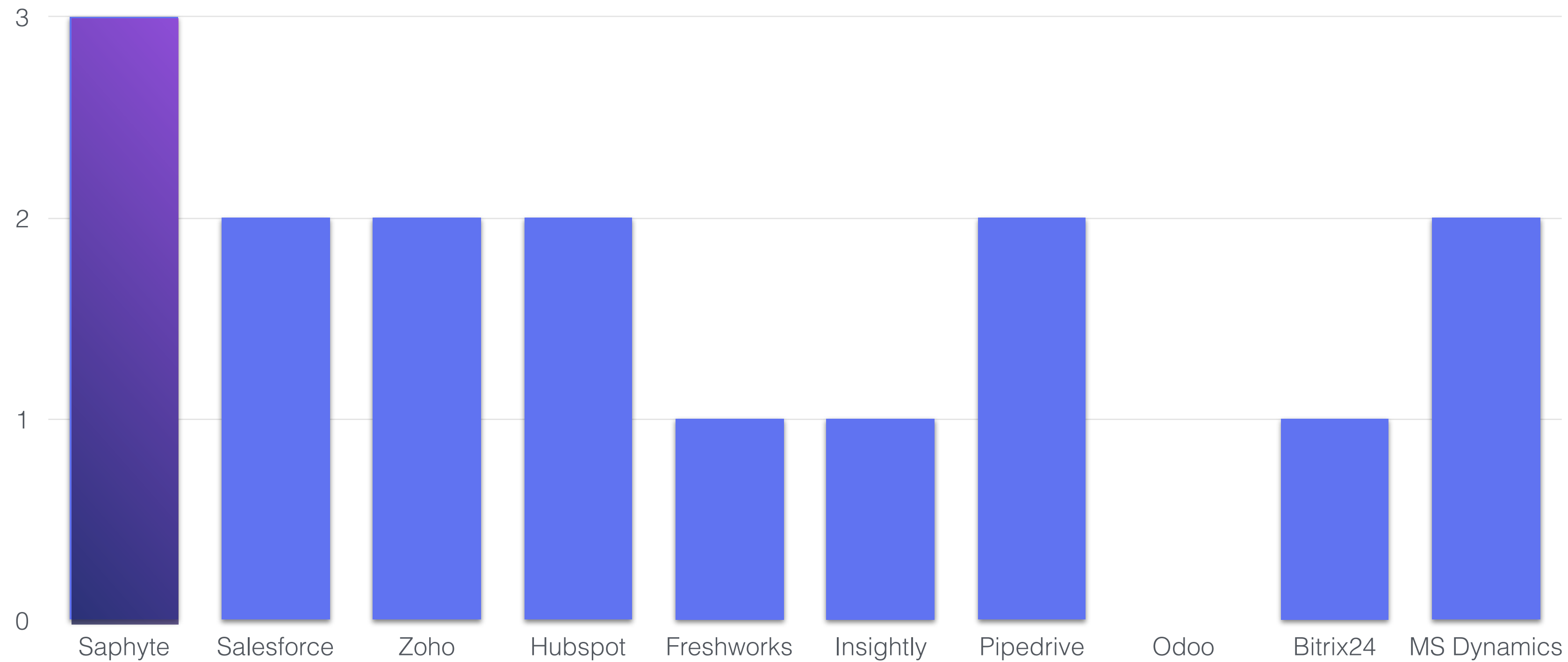


Saphyte's Support Management feature covers a crucial role in sustaining customer relationships and brand loyalty. Some neglect the importance of having a client portal with their CRM, not knowing its role in boosting productivity and client empowerment.

Based on the data analyzed, Saphyte ranks second with other big competitors. Saphyte is behind on just one feature which gives the customers the option to download the chat transcript.

As automation becomes relative, bots play a role in completing more support management tasks, leaving the team to be more productive. Chatbots offered by CRMs, such as the likes of Less Annoying and HubSpot, automatically assists prospects in getting the information they need – collecting data, asking questions and delivering more personalized content. Saphyte should also optimize 'self-service' as customers get their questions answered faster with less effort required from the provider.

Tools



When it comes to Tools, Saphyte ranks first among its competitors having 3 out of 3 tools offered.

Marketing Management		SAPHYTE	SALESFORCE	ZOHO	HUBSPOT	FRESHWORKS	INSIGHTLY	PIPEDRIVE	ODOO	BITRIX24	MS DYNAMICS 365
1	Saphyte Scan / Business Card Scanning	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
2	Saphyte Sync / Lead Capture Tool	Yes	No	No	No	No	No	No	No	No	No
3	Customizable Data Uploader	Yes	Yes	Yes	Yes	No	No	Yes	No	No	Yes
		3	2	2	2	1	1	2	0	1	2



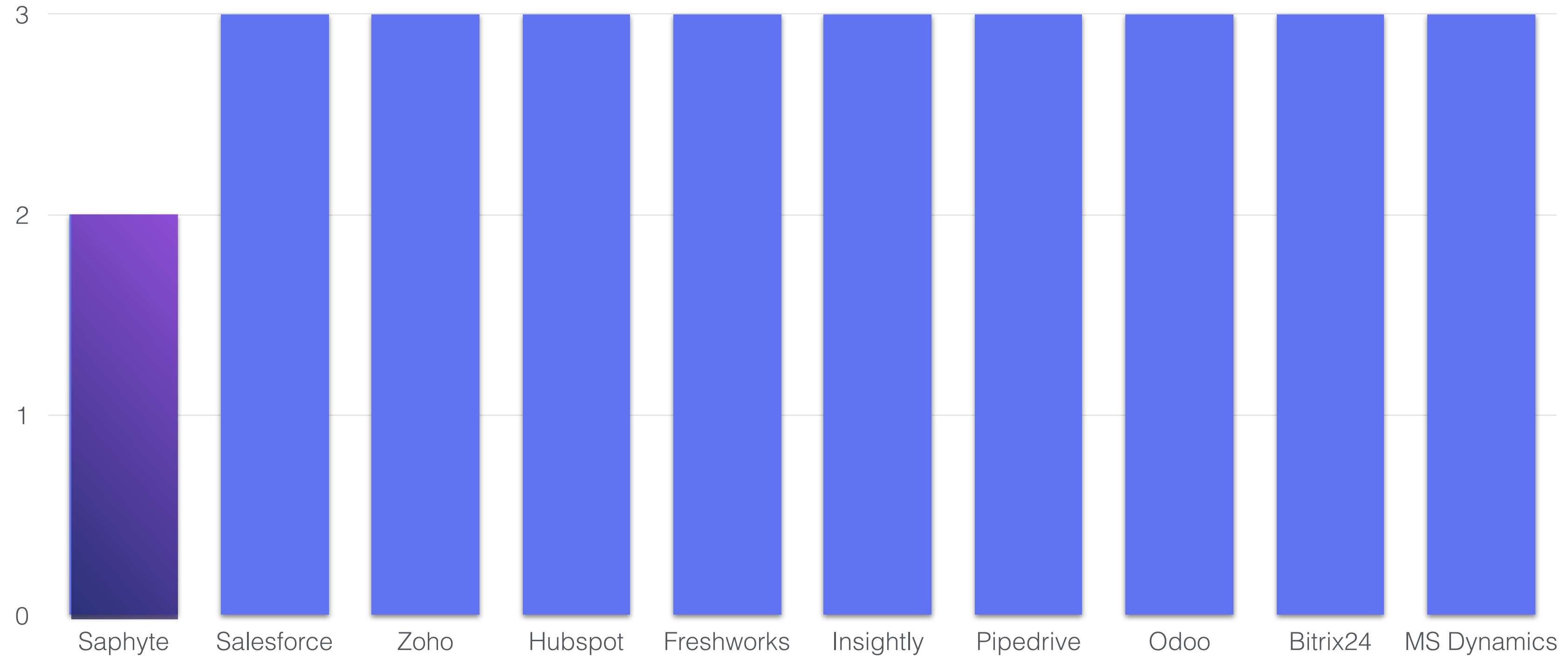
Saphyte, compared to the other CRM platforms, provides a powerful business solution at cost-effective pricing. As the majority of CRMs use web forms and landing pages to capture leads, Saphyte has developed a free tool called Saphyte Sync that functions as a browser extension plugin and helps you search and capture LinkedIn contacts with just a click.

This is a unique feature that is not present with the other CRM providers. It allows you to capture LinkedIn contacts with auto-populated information such as Name, Company, Email Address, Country, and other details. All of this happens swiftly and automatically, with just a simple click. The captured contact information can also be assigned to specific categories, statuses, and sub-statuses for better organization of your contacts. It also detects duplicated data to identify new and existing contacts. You will then have the ability to merge or replace the duplicate information for proper data capturing.

Moreover, the captured LinkedIn contact will automatically be synced into your CRM. Thus, this feature provides effortless capturing of contact information while increasing productivity. Saphyte Scan is also a prominent tool included in Saphyte CRM's mobile version. All you need is to log-in to your Saphyte account, tap on Scan, get your prospect's business card, and scan-and-store your info.

In addition, Saphyte's Customizable Data Uploader is another unique feature to note. This allows you to upload data conveniently through its drag and drop functionality. All of these features and functionalities can be applied to any type of business from different sectors without breaking their budget.

Mobile App



When it comes to Mobile App, Saphyte ranks behind among its competitors having 2 out of 3 main features.



Saphyte is equal with its competitors when it comes to the availability of its mobile app in Android and iOS. However, Saphyte lags behind due to the unavailability of Geolocation. This feature allows the mobile app user to check in for attendance and pin their location real-time. This is a game changer for customers who require location tracking of their salespeople and accurately measure the working hours of their remote workers.

This is a feature that Saphyte should consider developing to be equally competitive under the Mobile App category.

Conclusion

		Mobile App	Team Management	Workspace Management	Client Management	Sales Management	Marketing Management	Support Management	Tools	Total	Rank
1	Saphyte	2	12	15	10	8	14	5	3	69	3
2	Salesforce	3	11	16	10	8	14	6	2	70	2
3	Zoho	3	12	15	10	8	14	6	2	70	2
4	Hubspot	3	12	15	10	8	14	6	2	70	2
5	Freshworks	3	11	15	10	7	14	6	1	67	4
6	Insightly	3	9	14	10	8	12	4	1	61	7
7	Pipedrive	3	9	13	10	8	12	4	2	61	7
8	Odoo	3	12	14	9	8	13	5	0	64	5
9	Bitrix24	3	11	14	10	8	11	5	1	63	6
10	MS Dynamics 365	3	12	16	10	8	14	6	2	71	1



Saphyte **ranks third** among the ten competitors studied. **Saphyte has 69 out of the 71 main features** on the aspects of Sales, Marketing, Team and Workspace, Support management and Tools. This concludes that Saphyte, despite being juvenile in the growing CRM market compared to its competitors who have been there for more than a decade, is a strong competitor fairing better than the existing providers such as Freshworks, Insightly, Pipedrive, Odoo, and Bitrix24.

Saphyte is looking to be at par with the main big players such as Zoho, Salesforce, Hubspot, and Microsoft Dynamics by year-end of 2021 once the other improvements and features in the roadmap are developed



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