

Key Trends

- Continued user demands for custom SFA solutions will keep the SFA marketplace fragmented and unstable through the year 2000. Enterprises must assume total responsibility for the long-term viability of SFA projects.
- Increased demand for integrated solutions that span several areas of the sales cycle will fuel continued vendor partnerships.
- SFA vendors will fall into two camps: 1) those focused on building business objects and 2) those integrating and supporting business objects within an SFA enterprise engine.
- A realization of the benefits of interactive selling systems will shift the demand for SFA solutions away from administrative systems to those that can be used to influence buying decisions.
- Organizations will begin to pursue alternative selling interfaces (e.g., kiosks, electronic leave behinds, online bulletin boards, promotional diskettes and promotional CD-ROMs), thus driving the demand for unassisted selling tools and tools that sell beyond the sales call.
- Sixty percent of organizations will move field sales representatives out of the office to cut costs. Technology will be used to make up for the loss of support staff, a trend that will prove to be unproductive.
- SFA applications will become more process driven as opposed to data driven, fueling the demand for solutions that embody selling methodology.
- SFA customization tools will move from proprietary to more-generic third-party tools.
- Surviving SFA vendors will be those that are more product companies rather than custom solution providers.
- Third-party consultants and system integrators will supplement SFA application developers in implementing SFA systems, thus raising the price of SFA projects.

SFA Vendors

Reader Notes

The SFA marketplace is dominated by some 500 small vendors, each attacking some component of the sales function. The market is fragmented and unstable, with most SFA vendors being hurt by an inability to replicate solutions among clients, heavy customization burdens, broad visions, a lack of R&D investments, poor support, legacy installed bases, management issues, long sales cycles and a lack of support from the investment community. We will continue for at least five years to be in a period in which the industry must seek standards and change much of its infrastructure.

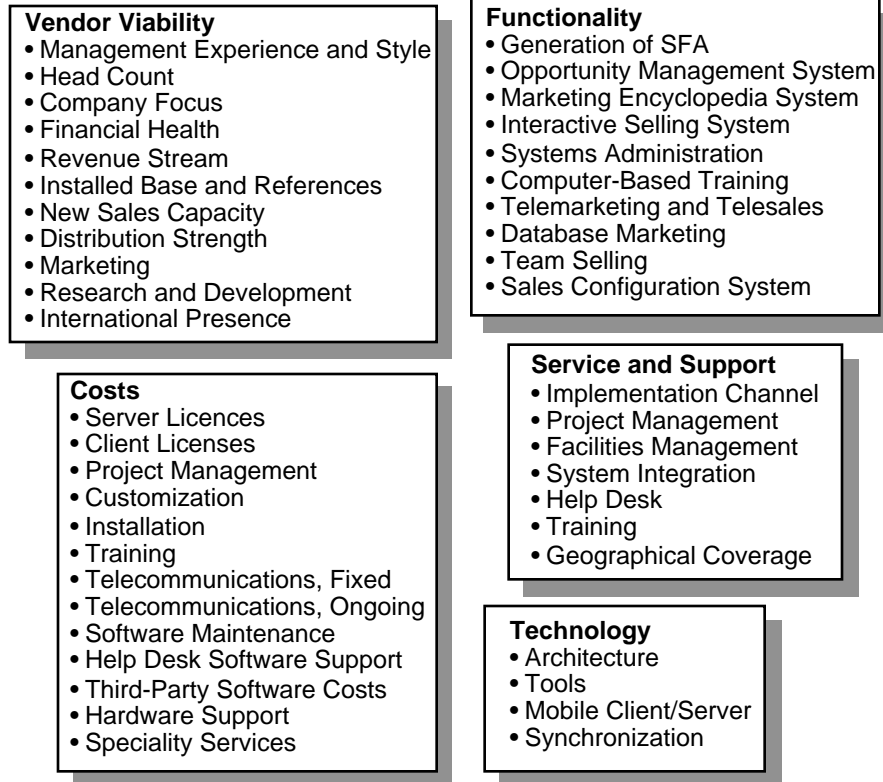
Organizations must take all necessary precautions when purchasing SFA software, as we believe the challenges facing SFA vendors will ultimately translate into financial pressures on many of the vendors during the next five years. Key signs of potential vendor success include rich application content, robust and flexible user maintenance tools for software modifications, strong vision, pragmatic partnerships, innovative and extensible technology, customer satisfaction, access to consulting services, and a consistent track record.



Which vendors will significantly affect the SFA marketplace during the next five years?

Reader Notes

Vendor Evaluation Model



Source: Gartner Group

In the early days of the SFA industry, it took only a contact management application and good distribution channels to become a serious provider of SFA software. Symantec Corp., the maker of ACT, is a good example of a vendor that captured substantial market share via such a strategy. The rules of the game in the SFA industry have changed dramatically. Competing in the 1990s presents a host of new challenges for vendors — challenges that promise to create a shifting and more tenuous balance of power. Users will face greater challenges in evaluating and selecting vendors and will assume higher risks. Thus, organizations must evaluate vendors on a host of criteria, assigning relative weights to the analysis.

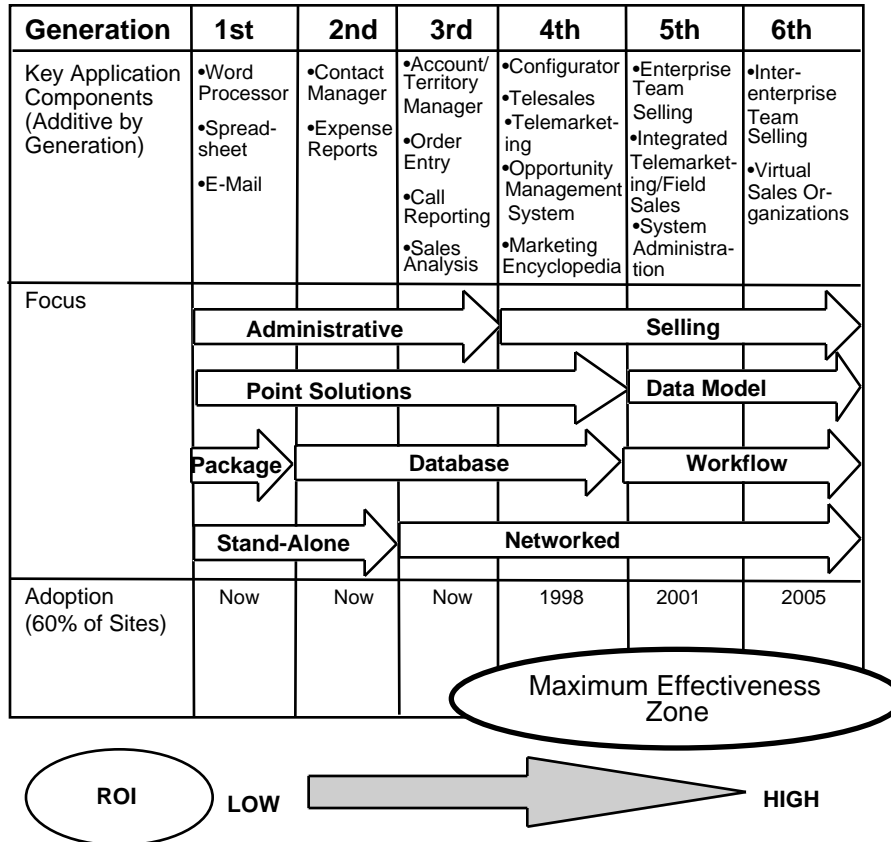
Here, we share our criteria for analyzing SFA vendors and provide a high-level strategic overview of selected SFA vendors. Our analyses are intended to serve as a guide in making key vendor selection decisions.



Vendors producing fourth-generation systems or higher will dominate the market. SFA vendors that do not comply by 1997 will be relegated to niche markets (0.8 probability).

Reader Notes

The Evolution of SFA Systems



Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

Most leading SFA vendors are delivering partial fourth-generation SFA system components; however, the integration of components is not expected until mid-1996 (0.8 probability). SFA vendors producing fifth-generation systems have begun to incorporate team coordination, but the solutions lack active workflow, which is required for a true implementation of team selling. Active workflow employs messaging technology to notify people proactively of events and assignments. Team coordination employs passive workflow, which requires users to take action to learn of assignments and action items such as researching database entries. We do not expect to see SFA solutions with active workflow until 1999 (0.7 probability). Interenterprise active workflow is required for a sixth-generation SFA system, which we do not expect within the planning horizon (0.9 probability).



Through 1998, successful vendors will be those that deliver optimal SFA functionality through rich application content, access to consulting services, and robust user customization tools (0.8 probability).

Reader Notes

SFA Vendor Functionality Assessment

	Generation of SFA	Base Application Content	Access and Quality of Customization Services	Availability of Customization Tools
Action Systems	4th	++++	+++	++
Altro Solutions	4th	++++	++	+
Antalys	4th	+++++	++++	+++++
Aurum	5th	+++++	+++++	+++++
Brock	5th	++++	+++++	+++++
CorNet	4th	+++++	++++	+++++
CWC	4th	+++++	+++++	+++
Dendrite	3rd	++++	+++++	+++
Fastech	3rd	+++++	++++	+++++
IMA	5th	+++	++++	+++++
IRI Software	3rd	+++++	++++	++
MediaShare	4th	++++	++	+++++
SalesBook	4th	++++	+	+++++
Salesoft	4th	++++	+	+++++
Saratoga	3rd	+++	+++	+++++
Siebel Systems	5th	+++++	+++++	++++
SoftAd	4th	+++++	++	++
ST (Pharma)	5th	+++++	++++	+
Thinque Systems	3rd	++++	++	+
Trilogy	4th	+++++	+++++	+++++

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

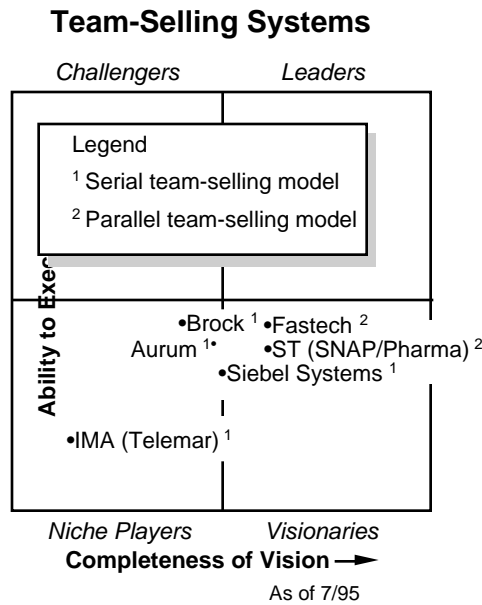
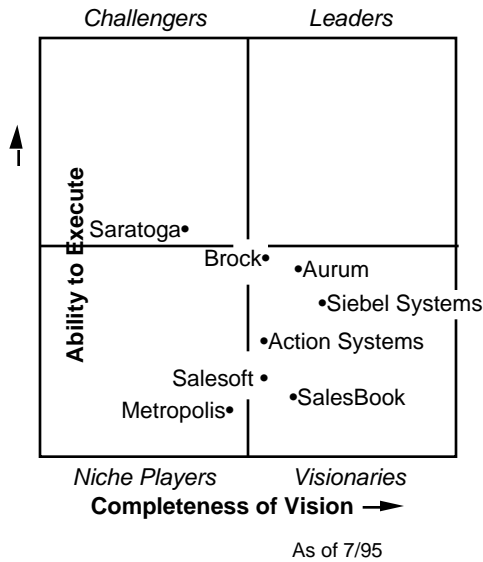
Organizations have three choices for acquiring SFA functionality. The first choice is to examine solutions that offer robust application content and influence the vendor's future enhancements vision. This approach will minimize costs associated with customizations, will help to ensure a healthy SFA vendor, and will allow an organization to focus on its core competencies as opposed to being an SFA solution developer. The disadvantage is that users may have to change their business processes to conform to the package demands. The second choice is to rely on the vendor's access to consulting services and use these services to develop more-custom solutions. This approach is more costly, but it offers a high degree of flexibility and integration with the rest of the application portfolio/data. The third choice is to select a vendor with robust and flexible user tools for software modifications. Application domain knowledge is critical, as is the willingness of the end user to spend time with the IS organization defining the requirements. Leading SFA vendors will provide all three options.



By 1999, 40 percent of leading SFA vendors will have a partial opportunity management system (0.8 probability) and 30 percent will support team selling (0.6 probability).

Reader Notes

Opportunity Management Systems



Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

Today, we see many partial OMSs that begin to address opportunities (i.e., leads or objectives) as the core entity of the SFA system. However, the applications lack a sales process focus, other applications are not yet subordinate to the OMS and active workflow is still missing. As the vendors improve their support for workflow, team selling becomes possible. Fastech and ST support a parallel team-selling model, meaning that multiple individuals are assigned tasks on a single step in the sales process. Other vendors practice a serial team-selling model, where multiple sales channels can pass information back and forth (e.g., field sales and telemarketing).

Through 1998, the key differentiator among OMS vendors will be support for workflow and team selling, and their ability to deliver an OMS as the framework for all other SFA modules. We believe Aurum, Brock and Siebel (for organizations with a business-to-business selling model) and Fastech (for the consumer packaged-goods industry) are in the best position.



Given its open tools and partnership approach, we believe Aurum will emerge as a leading SFA vendor in serial team-selling systems by 1999 (0.6 probability).

Reader Notes

Aurum at a Glance

Prognosis: Will leverage its technology and partnerships to continue to win new business. Will have difficulty supporting all areas it is targeting.

Key Factors: Can Aurum continue to support the varied platforms that its customers now use? At what rate will other SFA vendors deliver support for nonproprietary client/server development tools? Is Aurum spread too thin? Will Gupta be a key player? Continued venture funding.

- Strengths**
 - Open architecture (e.g., Gupta SQL Windows tools)
 - Integration of field sales with telemarketing
 - Opportunity management system
- Challenges**
 - Migrate all applications to a common platform
 - Manage partnerships (e.g., XcelleNet, Calico, IBM)
 - Deliver interactive selling system component
 - Better user migration strategy
 - Improved user interface
 - Broad vision

Consider Aurum when:

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| <input checked="" type="checkbox"/> OMS | <input checked="" type="checkbox"/> Strong Data Synchronization | <input checked="" type="checkbox"/> North America | <input checked="" type="checkbox"/> Price Sensitive |
| <input type="checkbox"/> MES | <input type="checkbox"/> Strong Mobile C/S | <input checked="" type="checkbox"/> Europe | <input type="checkbox"/> Full Service |
| <input type="checkbox"/> SCS | <input checked="" type="checkbox"/> Strong Tools | <input type="checkbox"/> Far East | <input type="checkbox"/> Type A (Aggressive) |
| <input type="checkbox"/> ISS | <input checked="" type="checkbox"/> Technology Sweet Spot | <input checked="" type="checkbox"/> South America | <input checked="" type="checkbox"/> Type B (Balanced) |
| <input checked="" type="checkbox"/> Team Selling | | | <input type="checkbox"/> Type C (Cautious) |

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

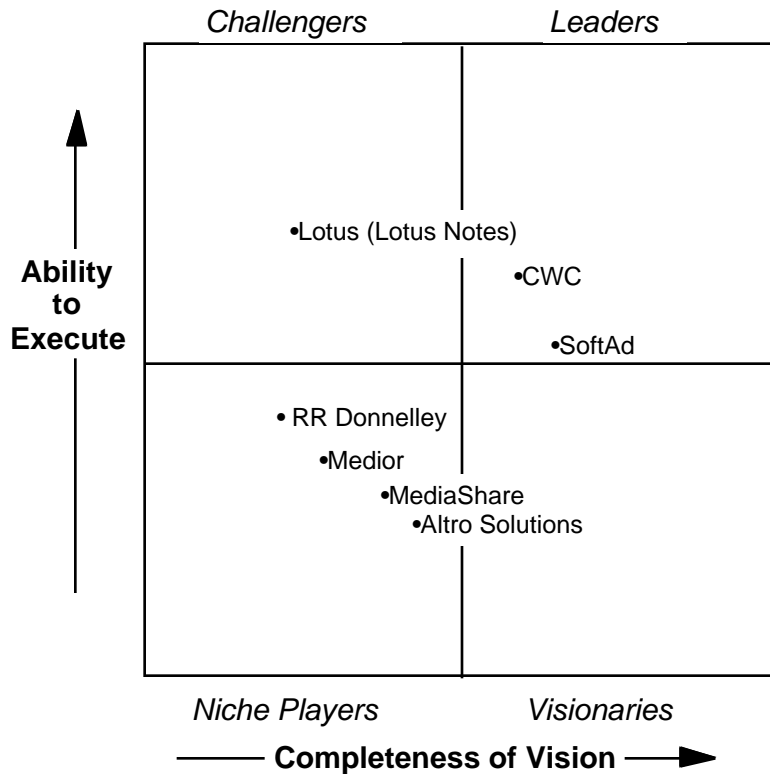
Aurum has won several large SFA contracts because of: its customization tools; its partnerships with IBM (and other systems integrators), XcelleNet and Calico; its staff; the value/price of its applications; and its ability to support team selling. A strength for Aurum is that its SFA products come bundled with source code and Gupta's SQL Windows developer's kit, and thus organizations with Gupta expertise do not have to rely on the vendor for customization. However, Aurum provides only a paper-based customization methodology for organizations to follow in order to take advantage of product upgrades. A new player to the SFA market, Aurum began in 1990 with applications for the help desk/customer support market. It still offers these applications, which require it to support a different platform (Unify), distracting its focus from the SFA market. Because of Aurum's size and resources, we believe its broad focus presents a real challenge. To become a leader, Aurum must focus solely on the SFA market, improve its user interface, deliver better integration with other SFA components, utilize XcelleNet (most clients are using Aurum's proprietary communications based on Cross Talk), and successfully manage its partnerships.



By 1998, 30 percent of leading SFA vendors will have MES functions as a component of their SFA product (0.8 probability).

Reader Notes

Marketing Encyclopedia Systems



As of 7/95

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

Many in-house IT organizations and SFA vendors are developing marketing encyclopedia systems (MESs) using tools and applications such as Lotus Notes, XcelleNet's Remoteware, Visual Basic with Access, and Adobe's Acrobat. Other vendors are focused on providing turnkey MESs. RR Donnelley, MediaShare and Medior provide easily leveraged MESs; however, they are more focused on the electronic catalog market and lack a vision for the fully integrated sales system. MediaShare provides MES tools and services, whereas the other two are more custom solution providers. We believe MES implementations must be part of an overall strategy for SFA, which may require an organization to develop a custom solution using a tool like Lotus Notes. CWC, Altro (Mac users) and SoftAd have a vision for the total SFA solution, with CWC having the best solution because of its integration with PenUltimate's OMS. To be leaders, MES vendors must go beyond electronic catalogs. They must enhance their solutions to deliver interactive selling systems and must incorporate their solutions into an overall vision for SFA or risk being relegated to multimedia outsourcing shops.



Because of its superior MES vision, SoftAd will remain a leader in MES through 1998 (0.6 probability).

Reader Notes

SoftAd at a Glance

Prognosis: Although a small company, SoftAd will remain a leading provider of MESs, attracting several large organizations to its SalesExcelerator product. SoftAd will have the most success in its target industries, such as media, automotive and real estate.

Key Factors: Can SoftAd raise the necessary capital? Can it make the transition from a custom software developer to a product company? Can it stay focused?

- Strengths**
 - Strong vision
 - Multimedia and human interface design expertise
 - Target industries
 - Organizations can leverage MES
- Challenges**
 - Keep pace with implementations
 - Raise capital
 - Deliver administration and customization tools
 - Improve OMS

Consider SoftAd when:

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|---|---|---|---|
| <input type="checkbox"/> OMS | <input type="checkbox"/> Strong Data Synchronization | <input checked="" type="checkbox"/> North America | <input checked="" type="checkbox"/> Price Sensitive |
| <input checked="" type="checkbox"/> MES | <input type="checkbox"/> Strong Mobile C/S | <input type="checkbox"/> Europe | <input type="checkbox"/> Full Service |
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| <input type="checkbox"/> Team Selling | | | <input type="checkbox"/> Type C (Cautious) |

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

SoftAd has a strong history of building marketing and sales tools. It has now moved to an SFA product strategy with its modular SalesExcelerator application. The product is tightly aligned with the sales process, with particular focus on leveraging marketing information in front of the customer. Sales Library, a module of the SalesExcelerator product, is used to develop various MES applications, including unassisted selling tools (e.g., kiosks and promotional diskettes), as well as assisted selling tools such as interactive selling systems. SoftAd's strength lies in: its multimedia capabilities; its understanding of the sales process; its preimplementation methodology; the SalesExcelerator product itself; and the vendor's experience and client base. SoftAd must deliver system administration and customization tools, add more robust OMS functionality, and implement solutions that combine more modules of the product. SoftAd must successfully manage its partnerships, improve its distribution channels, recruit implementation partners and raise additional capital.



Through 1998, Lotus will remain a dominant provider of document-centric databases for MESs (0.8 probability); however, organizations will continue to misapply Notes in SFA (0.8 probability).

Lotus at a Glance

Prognosis: Notes will not be a complete solution for SFA but will be used to build an MES, one component of an SFA system. Organizations using Notes for developing an MES will have difficulty leveraging it for other applications.

Key Factors: How rapidly will Notes partners targeting the SFA industry deliver Notes solutions developed using standard client/server development tools that combine Notes databases with relational databases? IBM acquisition.

- Strengths**
- Strong user following
 - Partners
 - Good for semistructured discussion infobases and documents
- Challenges**
- Combining Notes data with relational data
 - Lack of a robust development environment
 - Lack of consistency with user interface standards
 - Difficult to leverage Notes-centric MES
 - Open up deferred communications transport

Consider Lotus Notes when:

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|---|---|---|---|
| <input type="checkbox"/> OMS | <input checked="" type="checkbox"/> Strong Data Synchronization | <input checked="" type="checkbox"/> North America | <input checked="" type="checkbox"/> Price Sensitive |
| <input checked="" type="checkbox"/> MES | <input type="checkbox"/> Strong Mobile C/S | <input checked="" type="checkbox"/> Europe | <input type="checkbox"/> Full Service |
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Source: Gartner Group

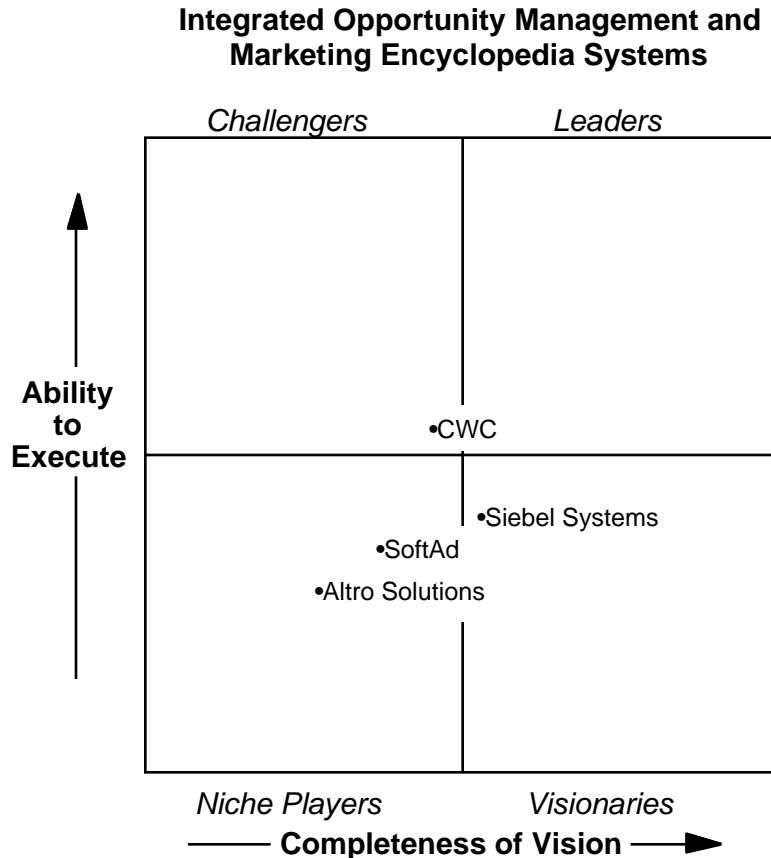
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Notes is good for simple application development based on semistructured documents, such as developing an MES. However, Notes is being misapplied in SFA. It is not a transaction-based database, and it is inappropriate for applications like OMS that are real-time transaction-oriented, that include production workflow, classical project management and other scheduling-related functions, and that require read-write database operations with normalized data structures. Another challenge with Notes is its closed deferred communications transport. Remote users who wish to provide single communications sessions for Notes and other data will have to live with multiple dial-up sessions through at least 1996 (0.7 probability). Finally, we believe organizations using Notes for an MES will have difficulty leveraging their MES to develop other applications (e.g., interactive selling systems) and integrating the MES into a total SFA solution. Nonetheless, with most SFA vendors small and unstable, an organization the size and strength of Lotus is a welcome player in the SFA market.



By 1999, 30 percent of leading SFA vendors will offer combined OMS and MES functions (0.8 probability).

Reader Notes



As of 7/95

Source: Gartner Group

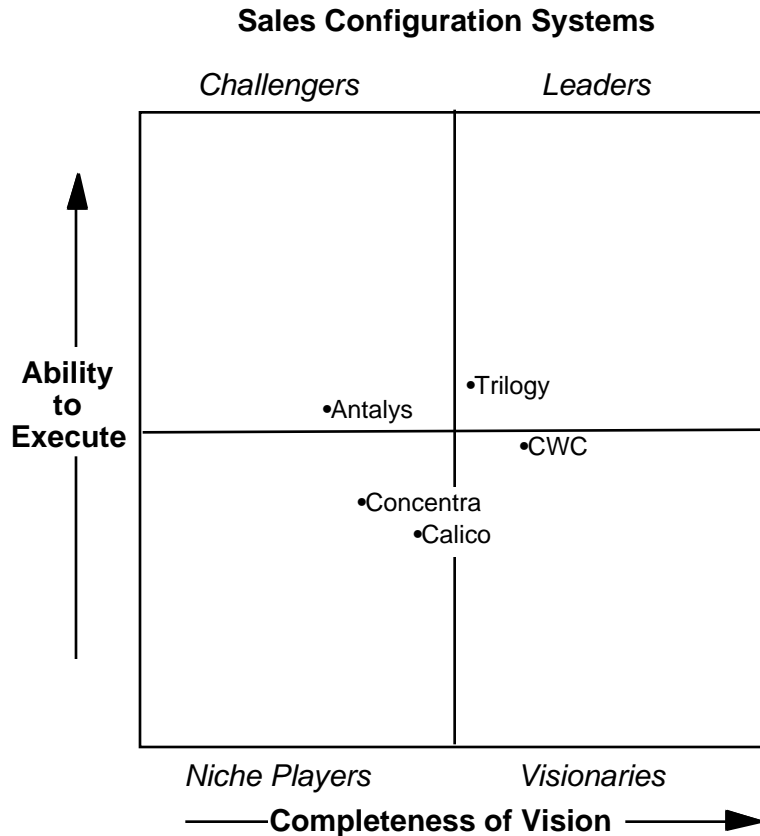
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CWC is currently integrating PenUltimate’s OMS within its sales system for a handful of clients. SoftAd and Altro Solutions offer basic OMS functionality integrated within their MESs. However, their limited OMS functionality may not meet the needs of some clients. Siebel Systems is in initial stages of customer implementations of its SFA software, which provides a framework to combine OMS and MES capabilities (it uses Adobe’s Acrobat) in combination with services from Andersen Consulting or KPMG. Other SFA vendors are offering one or both of the following choices: 1) clients develop their own online document reference library utilizing tools such as Adobe’s Acrobat or XcelleNet’s RemoteWare; or 2) clients can utilize OLE for launching an MES from within an OMS such as an MES developed using Lotus Notes. These implementations, however, will not be the interactive and highly cross-referenceable systems we see today from the MES vendors. Through 1997, we believe CWC and Siebel Systems will be in the position to provide integrated OMS and MES (0.7 probability).



Through 1998, vendors with configurators originally designed for mobile sales representatives rather than extended manufacturing-based configurators will be the leaders (0.8 probability).

Reader Notes



As of 7/95

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

Trilogy, Calico and Concentra are sales configuration system (SCS) development tool vendors that offer consulting services. Their solutions are for IS organizations that can allocate resources to learn a new development language, which is then used to model products and develop an SCS. Antalys is a consulting company with a set of configuration tools that can be used to develop and maintain an SCS in-house. Most Antalys customers have used Antalys for system development and integration, but the vendor will now sell its SCS tools without consulting services to enterprises that want to build the system in-house. CWC is a custom SCS solution provider focusing on services. All five vendors can deliver SCSs, so customers must choose among a variety of criteria. Trilogy is the strongest company, CWC has the widest breadth of SFA applications and services, Antalys has the highest-quality support, Concentra's configuration language is best for engineer-to-order solutions, and Calico's size and pricing are best for small and midsize sales organizations. We expect several additional vendors to enter the market throughout the planning horizon (0.9 probability).



Despite increased competition, Trilogy's technology and market momentum will enable it to grow strong SCS market share through 1999 (0.8 probability).

Reader Notes

Trilogy at a Glance

Prognosis: Will leverage its superior business model to achieve a sustainable leadership role in sales configuration systems.

Key Factors: Will Trilogy be able to expand its system capabilities to continue to differentiate its products enough to justify its high cost? Will Trilogy form partnerships to deliver increased SFA functionality? Will Trilogy successfully capture the SCS midmarket with scaled-down offerings? Will Trilogy become a leading SFA vendor or will it remain focused on SCS?

- Strengths**
- Rapidly evolving SCS developer tools
 - Gaining control of the information pipeline to PC VARs (i.e., Conquer Data Center)
 - New proposal generator with MES capabilities
- Challenges**
- Limited graphics capabilities
 - Solutions that span the sales cycle further
 - Improved consulting services
 - Implement midmarket strategy/product
 - Form partnerships
 - Increased competition from ERP-based configurators, in-house developed configurators and new SCS vendors.

Consider Trilogy when:

<input type="checkbox"/> OMS	<input type="checkbox"/> Strong Data Synchronization	<input checked="" type="checkbox"/> North America	<input type="checkbox"/> Price Sensitive
<input checked="" type="checkbox"/> MES	<input type="checkbox"/> Strong Mobile C/S	<input checked="" type="checkbox"/> Europe	<input type="checkbox"/> Full Service
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<input type="checkbox"/> Team Selling			<input type="checkbox"/> Type C (Cautious)

Source: Gartner Group

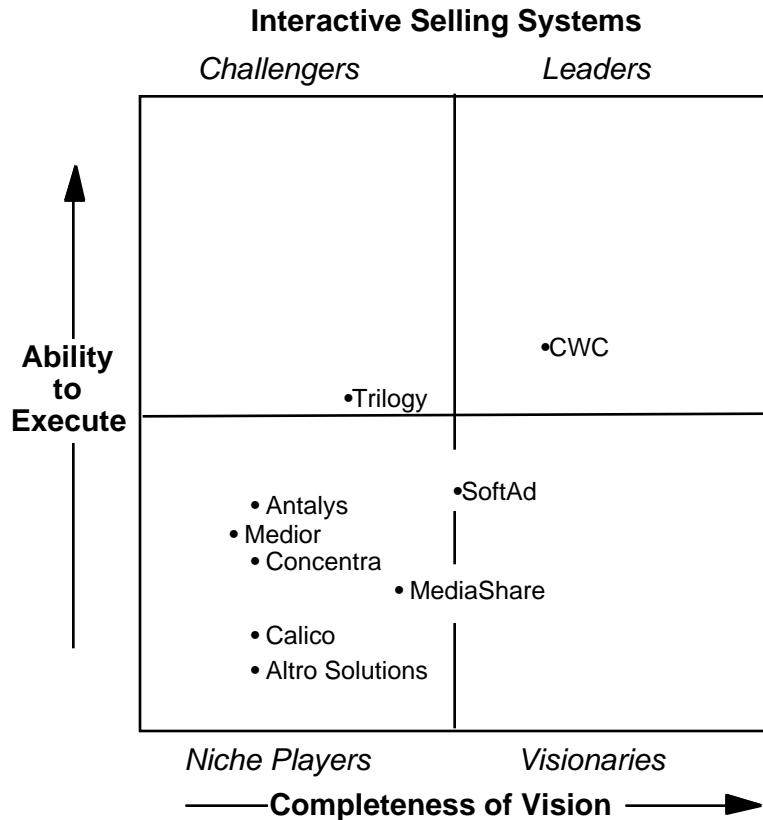
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Trilogy has developed a constraint-based programming language (i.e., CML) optimized for Trilogy's constraint-based configuration engine. The language contains patented configuration algorithms that can be used to solve many configuration problems (although some coding using Trilogy's development tools may be needed). The system includes a GUI maintenance environment designed to shield the developer from CML, but most CML programmers do not use it. Trilogy's strengths include: proven ability to develop integrated SCSs in a variety of environments; good integration with enterprise resource planning systems; and several recently introduced system enhancements, including a dynamic Windows interface for end users, integration with Metropolis' database synchronization technology, an improved maintenance system for novice developers, and a new proposal generator with MES capabilities. Trilogy must form partnerships with vendors offering complimentary SFA system components, must articulate a vision for the fully integrated SFA system and must increase its staff to keep pace with project demands.



By 1999, 30 percent of leading SFA vendors will offer an interactive selling system with the best systems coming from SCS vendors (0.6 probability).

Reader Notes



As of 7/95

Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

An interactive selling system is the integration of an MES, an SCS, a proposal generation system (PGS) and an order management system (ORD), under a common user interface. Several vendors offer various components of an ISS. CWC and SoftAd have developed many custom ISSs for clients, with both recently moving to a product approach. CWC is in the best position today, because it has its own configuration technology. However, both CWC and SoftAd will integrate another vendor's SCS within their applications. MediaShare offers a good MES and advanced product selection capabilities, but no configuration. Trilogy has recently released an improved proposal generator with MES capabilities to be used in conjunction with its SCS. Thus, we believe that CWC, SoftAd and Trilogy are in the best position to provide ISS. We believe SCS vendors (Calico, Concentra, Antalys) will follow Trilogy by improving their proposal generators and adding MES functions by 1998 (0.7 probability), providing organizations with more options. We believe MES vendors (Altro, MediaShare, Medior) will seek partnerships with SCS vendors or leave this integration to the client.



Because of CWC's transition from a custom SFA solution developer to a product approach and its ISS expertise, CWC will remain a dominant SFA vendor through 1998 (0.8 probability).

CWC at a Glance

Prognosis: CWC will keep pace with market requirements and continue to set standards for interactive selling systems. CWC will have difficulty migrating its installed base to its new product.

Key Factors: Can CWC successfully shift its client base from custom solutions to its new product? Can CWC improve its SCS technology or will organizations look to integrate CWC's systems with other vendors' configurators?

- Strengths**
- Sales process-focused applications
 - Interactive selling system
 - Full service orientation
 - Distribution channel automation expertise
 - Loyal customer base

- Challenges**
- Project management
 - Improve SCS capabilities
 - Migrate installed base to new product offering
 - Deliver OMS through PenUltimate partnership

Consider CWC when:

<input checked="" type="checkbox"/> OMS	<input type="checkbox"/> Strong Data Synchronization	<input checked="" type="checkbox"/> North America	<input type="checkbox"/> Price Sensitive
<input checked="" type="checkbox"/> MES	<input type="checkbox"/> Strong Mobile C/S	<input checked="" type="checkbox"/> Europe	<input checked="" type="checkbox"/> Full Service
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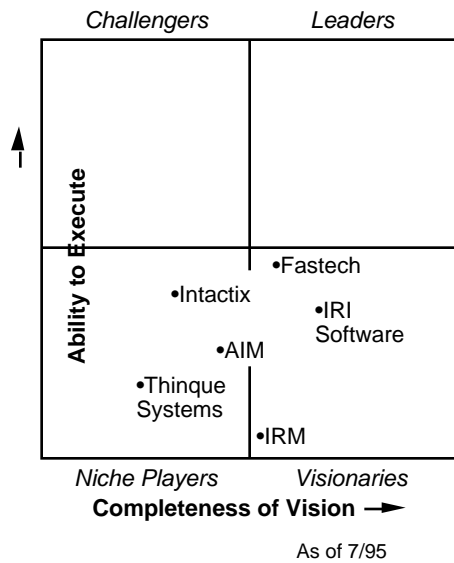
CWC is a full-service organization delivering interactive selling systems by joining the concepts of an MES with an SCS through a variety of product modules (e.g., customer requirements, price specification, life-cycle cost and proposal). CWC is in the process of integrating its ISS with PenUltimate's OMS, rounding out the vendor's offerings for field sales organizations. CWC has a firmly entrenched position as the SFA vendor of choice for the automotive industry and has recently expanded into new markets. The biggest challenge facing CWC is its ability to shift from a custom solution provider to a product company with its new product offerings. CWC must deliver system administration and customization tools, manage its partnerships and continue to improve its project management. CWC must enhance the capabilities of its SCS using advanced technology that better fits the problem at hand.



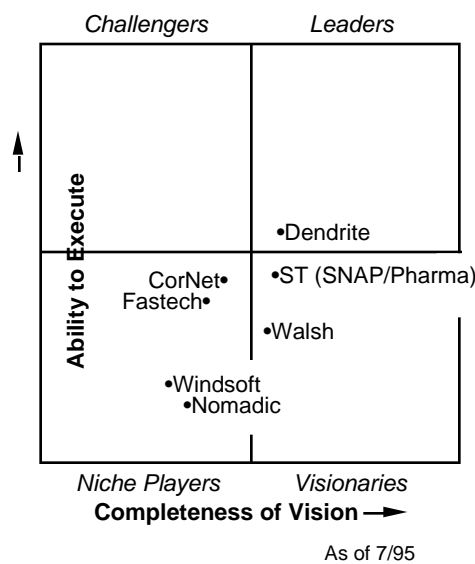
Vendors with an industry focus and robust user customization tools will be leaders through 2000 (0.7 probability).

Reader Notes

CPG-Industry-Focused Vendors



Pharmaceutical-Industry-Focused Vendors



Source: Gartner Group

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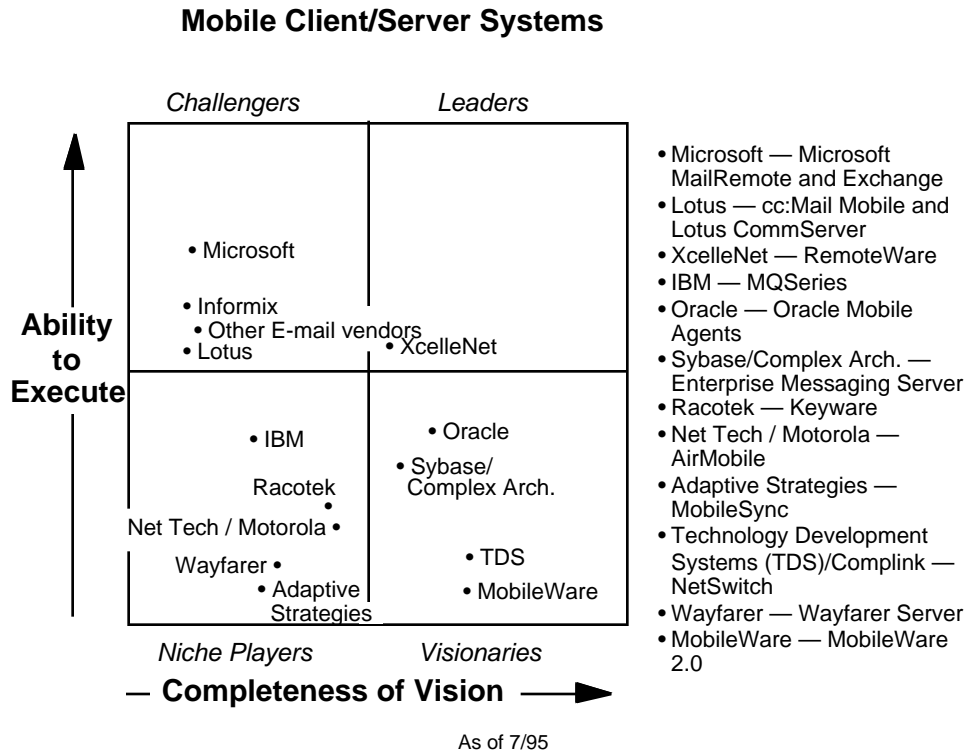
Organizations within the consumer packaged-goods (CPG) industry should plan on integrating solutions from several vendors. With the departure of Modatech and Sales Technologies from the CPG SFA vendor community, remaining choices include Fastech, Intactix, IRM and Thinque Systems for call-reporting applications, and Fastech, IRM, IRI and AIM for account-manager-level functionality.

Within the pharmaceutical industry, Dendrite, Sales Technologies and CorNet have completed their Windows-based SFA platforms, with Walsh expected to complete its migration at the end of 1995. We believe that these vendors will dominate the worldwide market, with Dendrite rated highest in its ability to execute because of broad worldwide sales and support, data source independence and its ability to fund continued growth from its July 1995 initial public offering. In addition to the above vendors, organizations will see functionality for the pharmaceutical industry emerge from Fastech and Nomadic Systems.



Specialized vendors will offer the most complete, well-developed mobile C/S solutions through 1996 (0.8 probability). By 1997, Sybase and Oracle will offer mature products with an installed base of reference accounts (0.7 probability).

Reader Notes



Source: Gartner Group

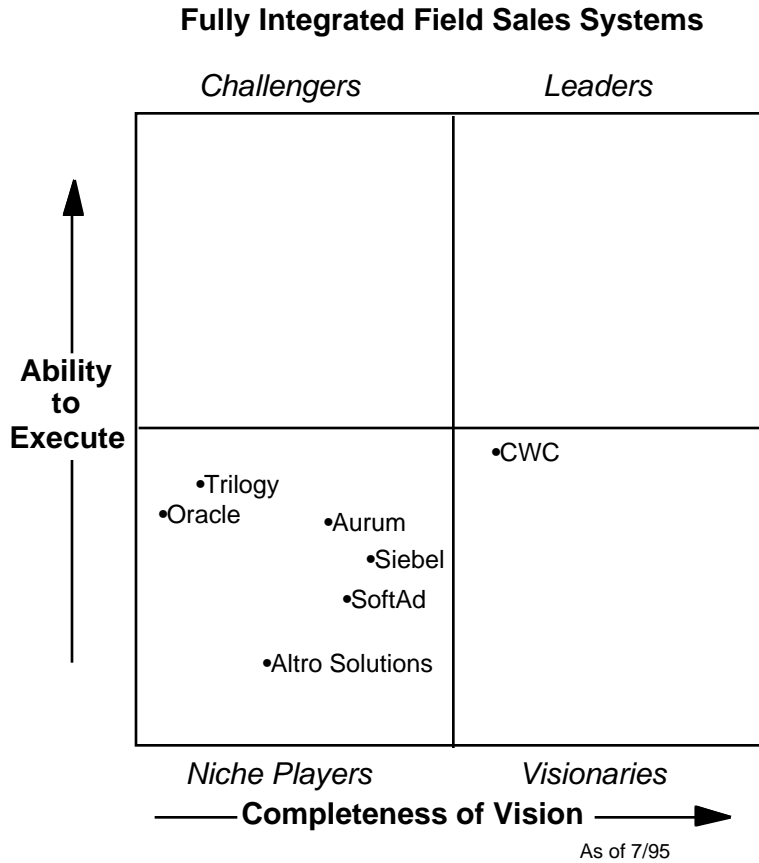
Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

For organizations that wish to implement mobile client/server SFA applications today, the most-complete deferred communications products come from the specialized vendor domain, which includes XcelleNet and TDS. Although users and SFA vendors have been able to construct “one off” solutions using E-mail products such as Lotus cc:Mail Remote or Microsoft MailRemote, such an approach will fall short as application requirements expand. As specialized vendors continue to adapt to more-open and standard technologies (for their container architecture, server platform, development tools and so on), they will continue to attract the interest of both user organizations and large database and messaging vendors who are seeking to improve their own standing in this area. Database vendors have stepped up their efforts to address mobile workers, as demonstrated by Oracle’s release of Oracle Mobile Agents and Sybase’s acquisition of Complex Architectures. By 1997, Sybase and Oracle will offer mature products with an installed base of reference accounts (0.7 probability).



No single SFA vendor or system integrator will deliver an integrated solution requiring less than 35-percent customization within the five-year planning horizon (0.8 probability).

Reader Notes



Source: Gartner Group

Key Issue: Which vendors will significantly affect the SFA marketplace during the next five years?

CWC appears to be the furthest along but is weak in team selling and system administration and customization tools. Aurum and partners can offer a team-selling solution with OMS, SCS, some MES functions, and services from IBM's SFA consulting practice; however, the solution lacks an ISS and integration of the various components is not complete. Siebel and partners are in the early stages of implementation of an integrated OMS, MES and team-selling system, but the solution is not an ISS and it lacks a fully functional toolset. SoftAd and Altro have MESs with some OMS functionality but lack configuration technology, team selling and tools. Trilogity has integrated its SCS with Metropolis' OMS for one client on the Mac platform, but it has not announced its intent to turn this solution into a product, nor has it demonstrated a vision for the fully integrated SFA system. Oracle recently entered the SFA market; however, we believe it will not meet the vision of SFA through 1996 (0.6 probability). Thus, users must be prepared with an overall vision for SFA and must be prepared to act as their own integrator, combining various SFA components and vendors into a fully integrated system.



Bottom Line

- Users should be concerned about the longevity of their vendors and must require adequate safeguards against loss of their vendor.
- Organizations must be prepared with an overall vision for SFA systems.
- Marketing analysis of the business process as it pertains to sales should be the driving force in the selection of SFA applications.
- Sales systems must be tied to measurable sales challenges.
- Organizations must consider customers and distribution channels in the SFA equation.
- Organizations must beware of selecting applications that require customization to the point of not being able to take advantage of vendor upgrade paths.
- Organizations should beware of the risks associated with implementing SFA applications outside of mainstream technology.
- SFA project teams should remember that implementation, training and support are more important than the vendor or application selected.

SFA Vendors

Reader Notes



SFA Companies**SFA Vendors**

Name	Location	Phone
Action Systems	Golden, Colo.	(303) 278-3331
AIM	Westport, Conn.	(203) 226 0316
Altro Solutions	San Jose, Calif.	(408) 345-4609
Antalys Inc.	Golden, Colo.	(303) 274-3000
Aurum Software Inc.	Santa Clara, Calif.	(408) 562-6370
Brock Control Systems Inc.	Atlanta, Ga.	(800) 221-0775
Calico Technology	San Jose, Calif.	(408) 271-8620
Clear With Computers (CWC)	Mankato, Minn.	(800) 524-7407
Concentra Corporation	Cambridge, Mass.	(617) 868-2800
CorNet Inc.	Stroudsburg, Pa.	(717) 420-0800
Dendrite International Inc.	Morristown, N.J.	(201) 425-1200
XcelleNet	Atlanta, Ga.	(404) 804-8100
Fastech	Broomall, Pa.	(610) 359-9200
Information Management Associates Inc. (IMA)	Shelton, Conn.	(800) 776-0462
Intactix International	Irving, Texas	(214) 580-1733
IRI Software, Division of Information Resources	Waltham, Mass.	(617) 890-1100
IRM	Carrollton, Texas	(800) 533-2312
Lotus Development Corp.	Cambridge, Mass.	(617) 577-8500
Medior Inc.	San Mateo, Calif.	(415) 525-4000
MediaShare Corp.	Carlsbad, Calif.	(619) 931-7171
Metropolis Software	Palo Alto, Calif.	(415) 462-2217
Nomadic Systems Inc.	Parsippany, N.J.	(201) 631-9777
PenUltimate Inc.	Irvine, Calif.	(800) 533-4433
RR Donnelley	Willowbrook, Ill.	(708) 655-7749
Sales Technologies Inc.	Atlanta, Ga.	(404) 841-4000
SalesBook Systems Inc.	Pittsford, N.Y.	(207) 338-6906
Saratoga Systems Inc.	Campbell, Calif.	(408) 371-9330
Salesoft	Columbus, Ohio	(614) 785-9300
Siebel Systems L.P.	Menlo Park, Calif.	(415) 329-6500
The SoftAd Group	Mill Valley, Calif.	(415) 332-4704
Thinque Systems	North Hollywood, Calif.	(818) 752-1351
Trilogy Development Corp.	Austin, Texas	(512) 794-5900
Walsh International	Hampton Court, Surrey, England	(44) 181 943 5355
WindSoft Inc.	Denville, N.J.	(201) 586-4400

(For mobile client/server vendors, see Gartner Group's Mobile C/S presentation or contact Gartner Group.)

