

PROADVISOR review

Results CRM

Overall Rating **9.75**

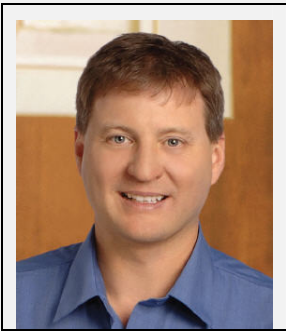


Results
Grow your business with Results™

Product Name

Results CRM
Results Software

Reviewed By



Steve Green
SGreen@sdgbs.com

Date Reviewed

April 2010

Summary

If you are a small or mid-sized business doing any type of sales or marketing, you owe it yourself to include Results CRM in your product evaluation process. In doing so, you will quickly see how your organization could benefit from enhanced performance, including the functionality described in the "Features" section on the next page.

For QuickBooks users, the integration component is extremely robust; more so than many products I have looked at or worked with in the past.

Strengths

Results is extremely full-featured. Products with this level of functionality often have a complex architecture making them hard to learn and use. With Results, navigation and search functionality are simple and allow you to easily and rapidly access the data you desire. Security options further enhance the product, allowing a granularity that can be structured so that only the right people have access to the information they need to do their job.

Limitations

No real limitations were noted in this evaluation. Of course, the importance of making sure a product will meet your needs and solve your pain points is crucial. Leverage the free trial, sample data, and the sales and support staff to make sure any application will do what you want before you commit. For Results, my experience indicates their staff will be happy to assist you in the process.

Wish List

This review is primary focused on QuickBooks Integration and not the product in general. As such, we would like to see a future release provide enhanced support for use with the following QuickBooks features:

- Sales tax
- On-hand vs. available inventory management
- Billing levels for service providers

Product Ratings

Rating

Setup and Installation:

In my evaluation, I used the MS Access based product and installation was a breeze. Other versions are available.

For setup, I played with the native sample data first, then created my own data connecting it to a QB sample file. I then wiped that data clean (with a blank data base immediately provided upon request from support) and attached to my QB file.

After going through the training, playing with the sample data, and using the well laid out documentation, I found the overall setup to be quite easy.

9.7

Interface:

Setting up the QuickBooks interface takes a bit of knowing what you want and what settings impact the outcome.

Because the integration options are so strong and offer the flexibility to address almost any need, following the documentation and/or attending the training was a key component to getting my desired outcome.

Integration can also be tightly controlled through security options.

9.8

Features:

The feature list is too long to do it justice in this format. However, most any organization would certainly benefit from the following:

Process Automation	Customer Service	Project Mgmt.
Delivery of Services	Inventory Mgmt.	Time Tracking
Billing Functionality	Scheduling	Outlook Integration

9.8

Ease of Use/Service and Support

The term "ease of use" needs to be tempered with the concept of overall product functionality. With Results, you won't know how to do everything in one sitting.

There are several intuitive features in Results that could be learned by doing. However, I recommend you shortcut that process and utilize the training tools provided. You can also easily adopt and deploy features in stages.

My support experience was phenomenal, I relied heavily on email questions which were answered quickly and included well documented instructions and screenshots. Web-based meeting software was also used to assist with training, questions and answers.

9.7

Ratings Definitions

10.0 (Perfect):

This exceedingly rare score is reserved for a product that is as perfect as it could be.

9.0 to 9.9 (Spectacular):

A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.

8.0 to 8.9 (Excellent):

A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.

7.0 to 7.9 (Very good):

While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.

6.0 to 6.9 (Good):

This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.

5.0 to 5.9 (Average):

A product that scores in this range is functional but unremarkable.

4.0 to 4.9 (Mediocre):

Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.

3.0 to 3.9 (Poor):

A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.

2.0 to 2.9 (Terrible):

A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.

1.0 to 1.9 (Abysmal):

A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.



Data Security / Privacy

In-product security is based primarily on the concept of creating security groups and assigning users to the appropriate group(s). At the group level, you can select to provide access to almost any function within the application itself.

The privacy and security policy of the company was exactly where I expected to find it; at the bottom of the home page of their website.

9.8

Integration with QuickBooks

In terms of what gets pushed and pulled to and from QuickBooks, I was more than pleased. Things I did not want sent to QuickBooks were excluded and most everything that did come over to QuickBooks came over the way I wanted to see it.

9.8
