


<p> Features: CRM, Project Management, Billing Industry: Not Specific Customers: SMBs Geography: All markets Languages: English, Spanish Cost: Starting at 30US\$ / Month Website: http://www.worketc.com </p>	
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Review methodology

This review constitutes an analysis based upon a product demonstration and review of the software by qualified system software experts at Eval-Source. The demonstration to Eval-Source was based upon a custom vendor demonstration script created by Eval-Source to validate and/or disprove claims mentioned by the vendor. It was specifically designed to identify functionalities and form an impartial analysis and review of the software for features of CRM, Project Management and Billing.

Background

For SMB enterprises finding a software solution may be difficult and isolating specific features and functions to accommodate specific needs for day-to-day operations especially if you are service based organization. There are many software packages and now many cloud vendors have started to create collaboration workspaces in which a vendor provides a platform and offers services that integrate and reside within that platform to simplify operations. WORKetc is a multi suite solution with CRM, Project Management, Project Billing, Collaboration and Document Management. This makes it a unique player in this market by combining this functionality. These features complement each other and have a more than competent workflow spanning all modules.

Target Market

WORKetc is targeted specifically for **SMB** but its technology and platform make it **very scalable** for larger users. The advantages targeted to the SMB market can range from many different industries, product based businesses and/or service based businesses.

The company has found its sweet spot for client acquisitions at the 5-25 user level and targeted industries include:

- Marketing, Advertising & PR Firms
- Web Development and Internet Marketing
- Management and Business Consultants
- Professional Services
- Secretariats and Virtual Assistants
- Any Business with a Service Offering

With over **520+ customers** worldwide WORKetc focuses on US, Canada, UK and Australia as its primary markets.

Pricing model

Monthly subscription: 1 User = \$29.95/month 2 Users = \$44.95/month Then each extra user is \$10/month/user with unlimited clients, projects, contacts. WORKetc sells directly to their customers at this point but are poised to introduce a partner and reseller program early 2011.

WORKetc is a flexible vendor as their offerings are strictly cloud based however because there is no contract for definitive time periods companies can use their offerings and then choose to discontinue the service. They offer additional services such as:

- Maintenance
- Tuning
- Configuration
- Training
- Data migration
- Product customizations
- Various levels of support that can be customized to your organization’s specific needs.

Essentially outside of the base subscription offerings which are sufficient for most clients there is also an upgraded package that offers deeper functionality in project management and billing. By year end there will also be a new version released that will include deeper functionality across the board mostly towards the Project Management and Customer Relationship Modules.

Product Analysis

Upon review of WORKetc, several strengths were definitely apparent and themes of consistency reigned throughout the demonstration.

The functional capabilities that WORKetc provide as part of the base model offering are:

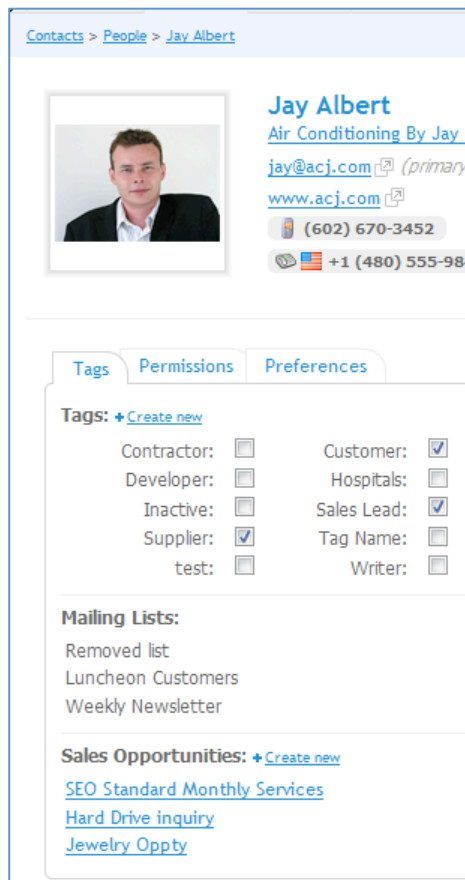
- | | | |
|----------------------|----------------------------|-----------------------------|
| • CRM | • Timesheets/time tracking | • Business Intelligence |
| • Project Management | • Customer Portal creation | • Sales Lead Management |
| • Workflow | • Email drop boxes by user | • Product Catalogue |
| • Billing | • vendor, project, | • Quotes/Estimates |
| • Documents | • Email marketing | • Knowledgebase creation. |
| • Contacts Directory | • Reporting | • Support Tickets/Help Desk |
| | • Calendars | |

The CRM portion of the software offers features that competitors may charge extra for and in some cases not available through other solutions. Such features as viewing existing sales pipelines, the ability to convert quotes to leads in order to generate a project and then subsequent billing for the project and assignment of sales leads to group and individual user are part of the base package. These features are

usually add-ons in other software packages and are additions to the base package price. Buyers should compare apples to apples when purchasing any type of software and use the same comparison criteria so that each vendor can be impartially analyzed.

In the screen shot below (figure 1) illustrates the level of detailed information that can be stored against a contact including full purchase, contact, marketing and support history.

Fig 1.



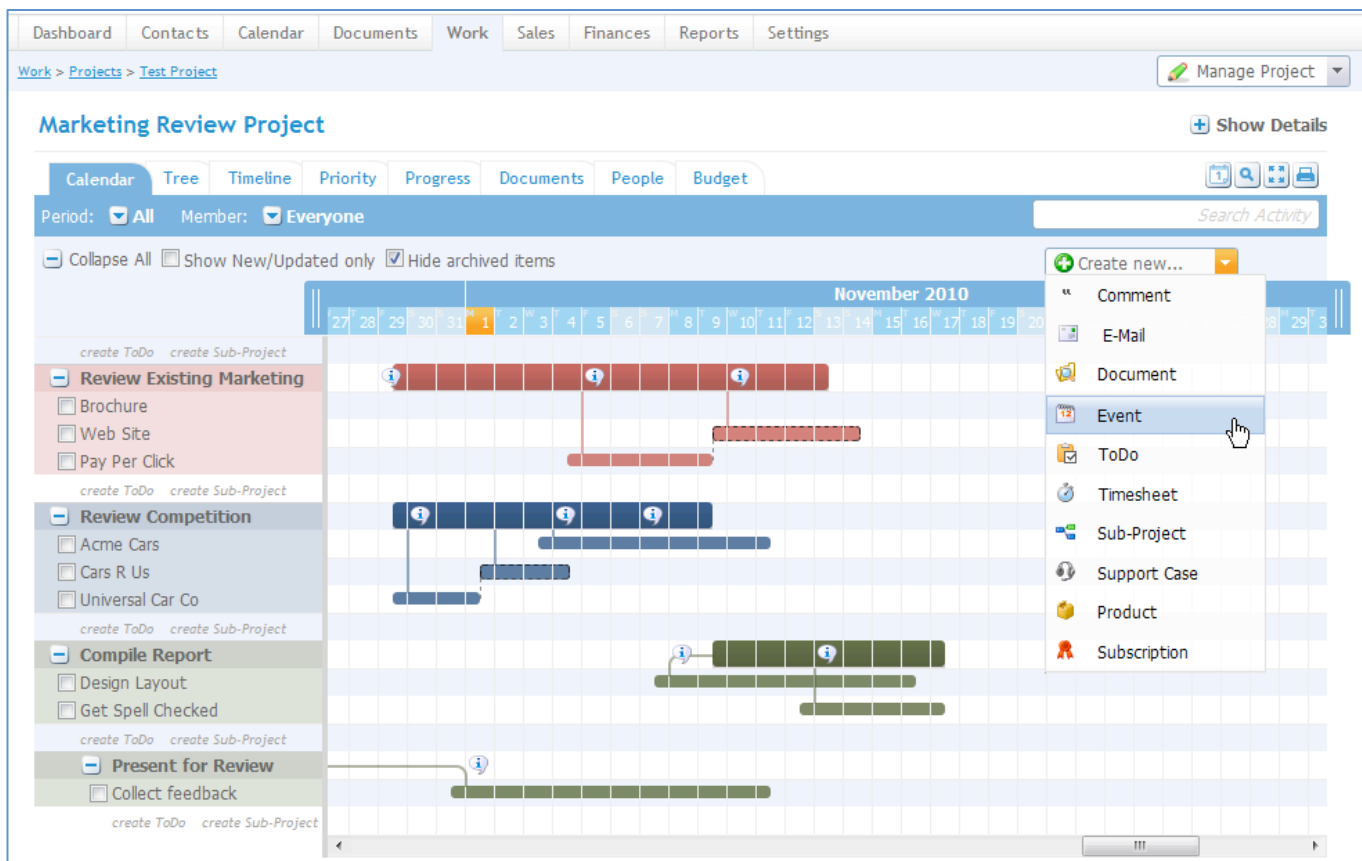
Due to its strong product architecture and its platform approach certain features such as collaboration both internally and externally, invoice tracking and milestone billing and internet portal creation are included within the WORKetc software. By providing a platform approach to house the modules external and internal collaboration is easily facilitated using WORKetc. The hierarchical architecture of the solution allows administrators session level security control. This becomes especially important when collaborating with outside parties and goes a long way to complement your network security policies and lowers the risk of business disruption and intrusion for your network.

A further point of differentiation allows document management and internal collaboration to be used on projects. The project functionality allows you to offer user level security and project level security to internal and external users of the software by project. It is important to note that whilst WORKetc offers a number of projects, time and product billing features, it is not a replacement for your accounting software, rather WORKetc integrates with common accounting software formats. There are API's supported for Outlook and Office integrations for simplicity.

Within the Project Management module the document management and workflow creation are part of the overall solution. The workflow creation, along with individual alert management can easily automate portions of the project contributing to best practices and process automation which is attributable to its platform approach. A bonus here is that it is easily customizable by the end-user without much of the IT overhead.

Figure 2 illustrates the progress of a project and the related documents attached to the project and any status updates by team members with notes and alert reminders to keep your project on-track. The workflow of process automation within the PM module offers good functionality for the price of solution.

Figure 2.



Total cost of Ownership

Are these components included the SaaS subscription?

- Hardware Yes
- OS Licenses Yes
- Database Licenses Yes
- Middleware Licenses N/A
- Software Licenses Yes
- Software Support Yes
- Hardware Maintenance Yes
- Software Maintenance Yes
- IT Operations N/A
- Upgrades Yes
- Training some initial training may be included

Technical Specifications

As a cloud based solution WORKetc is a multitenancy solution with online data centers, they use standard SSL encryption for data privacy, offers business continuity standards, redundancy for its data centers, application level security as well as session level security.

Web browser: most optimized for Mac & Windows. IE 8 & 9. FF 3+, Safari 3+

Availability of API for customer integration with existing systems. This is offered to customers to specifically create and allow different browser optimization options for Google Chrome and mobile platforms.

Competitive Landscape

WORKetc primary competitors are Netsuite, Base Camp, Highrise, Zoho, Salesforce + cloud add-ons. Since the product suite covers several high level broad based applications there is competition within each system type towards a point solution not a suite of products for what WORKetc provides.

In order for competing products to offer the same feature/functions set, they may have to be combined with add-on plus the base subscription price to equal the functionalities found in WORKetc

Figure 3 illustrates a comparison of features and functions by product of WORKetc main competition. The following chart is based upon a five user profile. **Please note: All new feature additions under Salesforce for Project Management/Billing and Time Sheets/Other Cool Stuff that say YES are extra paid additions and do not come with the Salesforce CRM original package. Without these paid additions, every single feature listed that says yes would say NO. Without the additional paid Dreamteam and FinancialForce apps, monthly cost is \$325. With the addition of Dreamteam/FinancialForce apps the monthly cost is \$1150.*

Figure 3.

Feature	WORKetc	Salesforce*	Highrise & Basecamp	Zoho CRM + Projects	SugarCRM
Total cost (5 users)	\$75/month	\$1150/month	\$147/month	\$91/month	\$275/month
CRM	WORKetc	Salesforce	Highrise	Zoho CRM	SugarCRM
Assign Sales Leads	✓	✓	✗	✓	✓
Qualify leads, set status	✓	✓	✓	✓	✓
View sales pipeline	✓	✓	✗	✓	✓
Collaborate on leads	✓	✓	✓	✓	✓
Set sales actions & alerts	✓	✓	✓	✓	✓
Web forms for leads	✓	✓	✗	✓	✓
Generate detailed reports	✓	✓	✗	✓	✓
Convert leads to quote, project, or invoice	✓	✗	✗	✗	✗
Project Management	WORKetc	Salesforce*	Basecamp	Zoho Projects	SugarCRM
Client collaboration	✓	✗	✓	✓	✗
Unlimited sub projects	✓	✓	✗	✗	✗
Gantt Chart View	✓	✓	✗	✓	✗
Project dependency	✓	✓	✗	✓	✗
Prioritise sub projects	✓	✓	✗	✓	✗
Set alerts	✓	✓	✓	✓	✗
Time sheet & milestone billing	✓	✓	✗	✗	✗
Billing & Time sheets	WORKetc	Salesforce*	37 Signals	Zoho Billing	SugarCRM
Time sheet billing	✓	✓	✗	✓	✗
Product catalog	✓	✗	✗	✓	✗
Subscription billing	✓	✓	✗	✓	✗
Multiple currencies	✓	✓	✗	✓	✗
Invoice tracking	✓	✓	✗	✓	✗
Future cash flow report	✓	✓	✗	✓	✗
Desktop timer widget	✓	✗	✗	✓	✗
Paypal, Google checkout & gateways	✓	✗	✗	✓	✗
Other Cool Stuff	WORKetc	Salesforce*	37 Signals	Zoho Billing	SugarCRM
Help Desk Software	✓	✗	✗	✗	✗
Document Management	✓	✗	✗	✗	✗
Easy customization options	✓	✗	✗	✗	✗

Conclusion

The overall impression of this software is very configurable and easy to use with common sense functional flows for operational procedures. This makes the software easy to track, input and aggregate information as well as editing documents within a project relatively easy.

The user interface is simple to understand and use. The ability to link items, contacts, expenses, incidents, workflows, alerts and documents to a project that perpetuates through the CRM module shows a deep understanding of product architecture and the seamless interface between the CRM, Project Management. Portals and Document Management modules proves to be a good fit for service based organizations and organizations that bill on time and materials are very well suited to this type of software.

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