

A CRM for Mac OS X?

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by Caty Kobe

As an analyst here at Focus I speak with hundreds of people a month regarding their CRM projects. Though the business world is predominately uses PCs, I do run into companies that are running the Mac OS X operating system and are in need of a CRM.

Software vs. Web-Based – The Great Debate

There are several things to consider when choosing a CRM, but one of the first questions to answer is whether or not a software based solution, or a web based solution would be a better fit for your company. There have already been several articles written about the specific differences and reasoning between the two, so I'm not going to time by repeating all of them.

For a Mac user there are some key points to this argument to remember. Web based CRMs will run on any operating system without a hitch, where as software based CRMs are proprietary to the operating system that they were designed for. At the most a Mac user might have to download a different web browser as not all web based CRM's run on Safari, but most solutions will work with no problem.

Software based solutions are a different story as the bulk of CRMs available are written for the Windows operating system. At this point Mac users have a couple of options:

- Run a virtualization software like VMWare's Fusion, or Parallels Desktop 4.0. Essentially either of these programs would allow you to run the Windows operating system along side of Mac OS X thus allowing proprietary Windows CRMs to be used.

A few things to consider with this option is that you will have to purchase a copy of the virtualization software for every computer that you plan on installing the CRM on, along with both a CRM and Windows OS license for each user. You will also need an anti-virus solution for each computer that is running Windows as it is the Mac OS X software that is resilient to viruses, and not the hardware. To clarify: it doesn't matter what shape your computer comes in – if you are running Windows on it you will need to get some type of virus protection.

- Our second option would be to purchase a CRM software that is written for Mac OS X. There are a few different products on the market that are available which brings me to my next point: what CRM products are available for the Mac OS X operating system?

What CRM Products are Available for the Mac OS X Operating System?

If you're interested in a web based solution then there a variety of products readily available. Salesforce.com, Netsuite, Landslide, Aplicor, and Sugar* are all mainstream web based CRM products that will run on a Mac. If you're interested in something that is a little more visually similar to the OS X interface then you may want to check out some of these:

- Highrise by 37 Signals (\$29 - \$149 per month dependent on users)
- Heap by WBP Systems (\$9 for the 1st user, then 5\$ per user after that)
- Elements CRM 2.0 from Ntractive* (starts at \$70 per user per month)

Though the aforementioned applications are web based, they were designed with the Mac OS X user in mind, so you will see consistencies within the details of both the application and the interface of your operating system.

If the idea of web based products doesn't sit well with you, and neither does the thought of running a virtualization software, don't give up quite yet. There are some software developers that have created software applications to run natively on your Mac.

Account Executive by Redlien is a great starting off point. They have a solid application that is highlighted with an intuitive user interface. They offer multi-user support, and offer developer access to their back end database in order to integrate the system with existing workflows. You can also choose to network your solution thus allowing web access for remote users. They also have a new beta project that will allow customers to integrate the CRM with their website, so that you can capture customer information directly from the site. The software starts at about \$130.

Daylite by Marketcircle is another popular software. They tend to be the most well known of the OS X compatible CRM's. They have the ability to integrate with existing Apple applications, but also have more focused sales and opportunity management capabilities. It can sync with iPhones, Blackberrys, and PDA's that are using Windows Mobile, as well as offering offline synchronization so that you can work wherever. There are some extra plug-ins available for purchase that will tie the system into Account Edge, Lightspeed, Money Edge, and File Maker Pro. One of the things that I like is that they boast, "industry templates," for both creative & non-creative markets. The software starts at about \$189.

Relationship by Jumsoft is a very cost effective and easy to use CRM. This solution is one that I'd recommend more for smaller businesses who need something that is basic, yet gets the job done. Relationship has a lot great features within their UI that allows the user to integrate with existing Mac OS X applications like Address Book. It effectively manages contacts and calendars, and can do some light email campaigns as well. Jumsoft also boasts other business development software that is built specifically for Mac OS X. The single user license starts at \$39.

Contact 5 and Up-to-Date by Now Software is the most basic of the available softwares. Essentially their software package is a calendar and contact management system that, in terms of overall functionality, is only

a slight step up from Apple's iCal and Address Book applications. They do have a, "schedule," feature which allows you to manage multiple people at once and plan for large meetings, along with a, "server manager," that will manage your contact and calendar servers. This is a solid solution for people who aren't completely satisfied with the pre-installed Apple applications, but don't need any campaign automation features.

What about Sugar and Ntractive?

Glad that you asked! Earlier in the article I marked both Sugar CRM and Ntractive's Elements CRM with an asterisk for a specific reason in that both of these vendors provide a web based product with a little twist.

Sugar CRM is best known for being one of the strongest open source CRM products on the market. They're pretty cost effective and have a strong sales solution that welcomes end user customization. They offer their product as either a web based or software product. I found a special company called BitNami that makes installers for open source applications. The moral of the story is this: If you want to use the software version of Sugar on a Mac, you can download BitNami's Sugar CRM Installer and it will take care of all the dirty work for you.

Ntractive's Elements CRM is different than your traditional web based CRM in that it combines a powerful web application with the convenience of having a desktop application. For the most part your information is still hosted on their servers (cloud computing), but you can download their application to your desktop thus eliminating the need to connect via a web browser. It seems to have the most robust feature set of the Mac OS X-only CRMs, and offers an application for the iPhone as well. It not only integrates with Address Book and iCal, but also with iChat, Skype, and Google Maps.

Final Thoughts

Though Macintosh computers are traditionally oriented towards the more creative markets, there are still strong business oriented applications available that can help companies thrive. The CRM tools that I have discussed will not only open up your sales and marketing efforts, but most of the time they can be combined with an accounting package & payroll solution to truly simplify your office. Generally speaking the CRM buying cycle is about 3-6 months depending on your company size and needs. Give yourself time to adequately research and fully demo a few different applications before making your decision, as you can't make an accurate decision based on online reviews.

Note: All pricing, features, and other details are accurate as of the time of publication. Please contact vendors for current pricing and feature listings.

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