

EMAIL & CALENDAR INTEGRATION WITH SALESFORCE

**2018 MARKET
LANDSCAPE REPORT**

BY STEVE ROCH

Written for

This research report is intended for the discerning Salesforce Consultants, Salesforce Administrators and Sales Operations personnel as an aid to streamline the evaluation of email and calendar integration tools in the Salesforce ecosystem. Inbox and calendaring integration garners an extremely high search volume on the Salesforce AppExchange as it is a necessity for driving efficient sales activity, Salesforce adoption and sales activity intelligence.

Executive Summary Pages 1–16

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Version 1.0 – April 2nd, 2018. *This research will be updated at least once per year. [Get the latest version.](#)*



ABOUT THE AUTHOR

This research is the work product of Steve Roch, owner at Boulder CRM. The impetus for this report is Steve's deep understanding of the email integration solutions available for Salesforce and his frustration that solutions are being chosen on name recognition alone, as there is no independent body of work comparing and contrasting the technical benefits of each vendor.

Over the course of 6 months, Steve and his teams installed each application to test user stories, performance and usability.

Steve is a CRM expert with 14 years as a Chief Information Officer for a software firm which relied heavily on CRM and email integration before founding a highly successful CRM practice, CRMCulture for 8 years. CRMCulture employed 53 Salesforce consultants and developers at its peak. In addition to building out the consulting practice at CRMCulture, Steve was the brain behind [ActionGrid](#) and [Pivotal Productivity Pack](#). ActionGrid is a native force.com app built to simplify Salesforce data management by emulating a spreadsheet in almost every way from within the Salesforce environment. Pivotal Productivity Pack was a similar product built for Pivotal CRM. In July 2016, CRMCulture and ActionGrid were acquired by [Conga](#) and Pivotal Productivity Pack was acquired by [Aptean](#) in 2014.

For more information about this research or to speak with [Steve Roch](#), meeting requests are available here. [Schedule Steve](#)

Executive Summary

The Salesforce ecosystem is made up of several vendors which integrate Salesforce data and functionality into one or more of the most popular email systems. This research compares and contrasts the top products available in this space. To be included, vendors needed to:

- Provide equivalent or better functionality than Salesforce's own Lightning for Outlook/Gmail and be among the top mentioned Apps in our own experience.
- To have frequently been listed among the most popular applications on the Salesforce AppExchange.
- To have been listed for at least two years or more.

Solutions that were automated email sync only such as Riva, Match My Email and Ebsta were not included. Furthermore, marketing automation centric solutions like YesWare and SalesLoft were not included as the focus was on the interactive solutions.

The research focused on four primary categories; **EMAIL ENVIRONMENTS SUPPORTED**, **PERFORMANCE & STABILITY**, **BASIC SALESFORCE INTEGRATION** and **ADVANCED FEATURES**.

Products were graded on individual user stories within each of the main criteria. Grading was based on a scale of 0-4; the scale indicating how well an individual requirement met the criteria. Ratings were defined as follows: Each category was broken down into sub-categories and user stories. Each user story received a score from 0 to 4, with 0 meaning no feature and 4 meaning superior feature or implementation. Ratings were defined as follows:

0	No or feature does not exist
1	Yes or poor UX/UI
2	Yes or room for improvement
3	Yes or good/acceptable user experience
4	Yes or superior user experience compared to competitors

EMAIL ENVIRONMENTS SUPPORTED

Especially when evaluating Microsoft Outlook solutions this category is important because even if a vendor does support the particular version/environment one is looking for, the total breadth of version support is an important indicator of how that vendor will support future versions. Many of the solutions that originated in Gmail only support the latest Outlook versions and these vendors seem to be slower at adapting to newer versions. Outlook for iOS is a great example as only two vendors support this version of Outlook (ZynBit and SmartCloud).

PERFORMANCE & STABILITY

If the app is not fast and consistently reliable, all the features in the world will not compensate for the frustration that a sales person feels when he/she just needs it to work. We found stark differences in speed and stability among the apps. We commonly found caching issues among those solutions that relied exclusively on browser-only technology for their side panels.

BASIC SALESFORCE INTEGRATION


Defined by the most common tasks and workflows an individual would be responsible for managing as part of their Salesforce workflow:

- The ease of linking of inbound/outbound email and calendar items to the Salesforce contacts/leads with special attention to multiple contacts on the To/Cc which some of the vendors don't handle as well as others.
- Ease and completeness of linking inbound/outbound email/calendar to opportunities and custom objects. Only three solutions handle opportunity matching perfectly (ZynBit, Salesforce Inbox, LFO/LFG).
- Creation of new Salesforce records; leads, contacts, accounts, opportunities and custom objects.
- Completeness of the side panel as a fully working Salesforce environment including interacting with related lists and having a side panel for the calendar, which only three apps offer (ZynBit, SmartCloud, LFO/LFG).
- Navigating, searching and updating Salesforce without leaving the native email or calendar interface.
- Linking documents/attachments.

ADVANCED FEATURES

Advanced features span categories such as sales enablement and acceleration, automated email/calendar sync, calendar availability/scheduling, mobile phone support, sales analytics and basic marketing automation capability.

AppExchange
Heroku Elements
LINK Marketplace






AppExchange
the Salesforce store

Home
Listings by Type
Product Collections
Industry Collections
Ohana

SEARCH RESULTS
Top Results
Apps
Bolt Solutions
Components
Consultants
Content

Apps

1386 Results

LISTING	LATEST RELEASE	RATING
 ZynBit for Outlook, Gmail & Office 365 - Sidebar, Ema...	1/16/2015	★★★★★ (375)
 iContact – Email Marketing	1/17/2011	★★★★★ (262)
 Campaign Monitor for Salesforce Email Marketing &...	4/4/2018	★★★★★ (47)
 Email Integration - Sync Exchange/Outlook/Google A...	9/16/2015	★★★★★ (278)

Email Integration Market Landscape

MARKET DESCRIPTION

At the time of this research, there were 1,372 applications on the Salesforce AppExchange that integrate Salesforce with some level of Email functionality and 264 that integrate Salesforce with Calendar functionality. Of those, 64 claim support for Outlook as an email system and 91 claim support for Gmail. Many of these applications only support very specific functions such as mass mail, converting

emails to leads, syncing calendars or tasks. However, there are a small number of applications that support the integration of Salesforce data with the most common tasks of an email system, creating and receiving new email, creating and managing calendar appointments, combined with tracking Salesforce activities and measuring customer engagement based on those activities.







Salesforce
HQ: San Francisco, CA

LinkPoint360
HQ: Red Bank, NJ







Cirrus Insight
HQ: Knoxville, TN

ZynBit
HQ: Raleigh, NC

Invisible CRM
HQ: Ukraine

		
Gained rapid visibility on the Salesforce AppExchange. Fastest and most reliable. Strong technically.	Free version from Salesforce. Replaced Salesforce for Outlook. Lots of negative reviews.	First vendor offering email integration to Salesforce, but long in the tooth now.
AppExchange Debut: 2015	AppExchange Debut: 2016	AppExchange Debut: 2006
AppExchange Rating ★ ★ ★ ★ ★	AppExchange Rating ★ ★ ↘	AppExchange Rating ★ ★ ★ ★ ★ ↘
375 Reviews	6 Reviews	509 Reviews
Pricing	Pricing	Pricing
		
Originated as Gmail only. Great brand recognition but weak technically. Delisted on the AppExchange in 2017	Formerly SalesforceIQ. Better in Gmail than Outlook. Strong phone client.	Integrates with many other CRM's. Powerful but cluttered and awkward interface.
AppExchange Debut: 2011	AppExchange Debut: 2015	AppExchange Debut: 2009
Not Currently Listed On The AppExchange	AppExchange Rating ★ ★ ★	AppExchange Rating ★ ★ ★ ★ ★ ↘
Not Applicable	8 Reviews	37 Reviews
Pricing	Pricing	Pricing

OVERALL VENDOR SCORES AND CHART

	ZynBit	Cirrus Insight	Salesforce Inbox	Lightning for Outlook/Gmail	LinkPoint 360	SmartCloud Connect
OVERALL SCORE	 69	 52.5	 36	 34	 34	 42
EMAIL ENVIRONMENTS	24	13	6	9	14	16
PERFORMANCE & STABILITY	13	9	6	7	8	4
SALESFORCE INTEGRATION	22	15.5	12	17	11	12
ADVANCED FEATURES	10	15	12	1	1	10

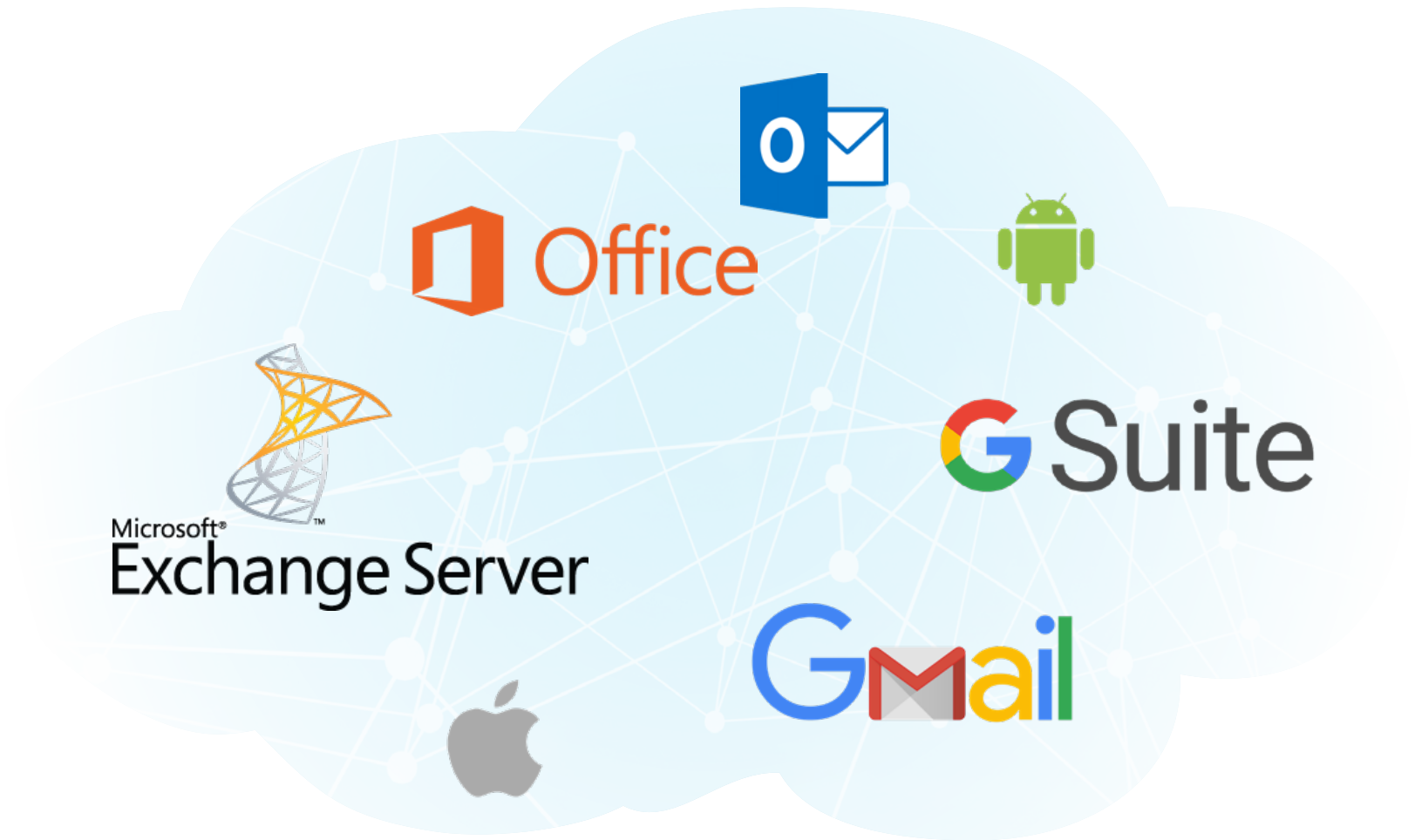
OVERALL FINDINGS

Overall, one vendor consistently scored higher in all categories, ZynBit. While, in some cases it may have lacked a feature or two as compared to others, it most definitely had the widest breadth of email environments supported which is a strong indicator for larger enterprises. Additionally, there was no competitor close in terms of performance and reliability. All other vendors struggled either in the speed at which their side panels refreshed or suffered from disconnection problems

with Salesforce or worse, caching problems where the side panel would be stuck on a previous emails contacts. Cirrus Insight is particularly plagued with caching problems.

It should also be noted that Cirrus Insight was delisted from the Salesforce AppExchange in 2017 and we are unsure what impact this may have to the future partner relationship between Salesforce and Cirrus Insight.

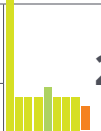
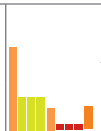
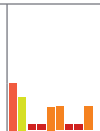
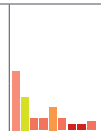
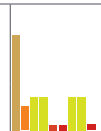
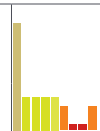
Email Environments Supported



Support for Various Email Clients and Environments

The research revealed there are many variables to consider when integrating email and calendar with Salesforce as there are various email clients in the market – Outlook being the most complex to research and rate as it comes in a variety of versions for Windows, Mac, Web and Mobile. Adding further complexity, depending on the version of Microsoft Outlook or Exchange Server used, only certain methods

of providing a sidebar (aka side panel, plug-in or extension) can be supported through the available API's from Microsoft. The table below indicates which vendors support the various combinations of email client paired with an email service. Scores indicate how well each vendor is able to support the email and calendar user experience in each environment.

		ZynBit	Cirrus Insight	Salesforce Inbox	LFO/LFG*	LinkPoint 360	SmartCloud Connect
CUMMULATIVE SCORE		 24	 13	 6	 9	 14	 16
Email Client	Email Service						
Outlook Desktop 2013/2016	Exchange 2013/2016/O365	3	3	3	3	2	3
Outlook Desktop 2007/2010	Exchange 2003+	3	3	0	1	3	3
Outlook Desktop	Gmail, IMAP or POP3	3	3	0	1	3	3
Outlook Web Client	Exchange 2013/2016/O365	4	2	2	2	0	3
Outlook for Mac 2016	Exchange 2013/2016/O365	3	0	2	1	0	2
Outlook Desktop Terminal Server & Citrix	Any	3	0	0	0	3	0
Outlook Desktop Published Desktop/VM's	Any	3	0	0	0	3	0
Gmail Chrome Browser	Any	2	2	2	1	0	2

OVERALL EMAIL FINDINGS

Most importantly, we find the support for a large variety of clients to be a predictor of the future stability, performance and innovation capabilities of a vendor. Most Salesforce consulting partners and their customers prefer not to navigate through these complexities and would prefer a single vendor who can support their integration

requirements regardless of email environment as email clients and services are upgraded or migrated. **ZynBit** is the clear leader in this category, supporting the broadest range of email environments for both email sidebar and sync capabilities.

*LFO/LFG- stands for Lightning for Outlook, Lightning for Gmail

PERFORMANCE AND STABILITY

Performance and stability are perhaps the most important features to consider for an application as it needs to be fast and stable otherwise its features won't really matter. This is also an important factor in gauging the amount of technical support that may be required. Most larger orgs will sacrifice features for stability to ease their implementation and support burden.

We also noticed stark differences in performance with ZynBit being much faster than the other clients and with none of the caching and logging out problems that plagued some of the others. The slowest of the clients were Salesforce Inbox followed by SmartCloud Connect which was plagued by too much interface and its performance was hindered as a result.

We commonly found caching issues among those solutions that relied exclusively on browser-only technology for their side panels. Namely Cirrus Insight had significant problems with the side-panel refreshing properly when the user is rapidly spinning through emails.

EMAIL, CALENDAR AND MOBILE INTEGRATION WITH SALESFORCE WORKFLOWS

We used each of the clients extensively for many months and in some cases have used some of them for years. Although every organization will have different needs with different priorities we concentrated on the following common tasks:

1. The ease of linking of inbound/outbound email and calendar items to the Salesforce contacts/leads with special attention to multiple contacts on the To/Cc which some of the vendors don't handle as well as others. Namely Cirrus Insight and LinkPoint do a particular poor job of handling multiple contacts on the To/Cc line while ZynBit, Salesforce Inbox, SmartCloud Connect and even the free [Lightning for Outlook/Gmail](#) do better at showing the multiple contacts in their initial side panel.
2. Ease and completeness of linking inbound/outbound email/calendar to opportunities and custom objects. Only ZynBit and Salesforce Inbox handle opportunity matching perfectly as they search by both the OpportunityContactRole relationship as well as the Contact.Account ⇄ Opportunity.Account relationship.

This is a hugely important differentiator in our opinion, as Opportunity linking is such a common complaint we hear with some of the other vendors.

3. Creation of new Salesforce records; leads, contacts, accounts, opportunities and custom objects
4. Completeness of the side panel as a fully working Salesforce environment including interacting with related lists and having a side panel for the calendar, which only a few vendors offer (ZynBit, SmartCloud and the free [Lightning for Outlook/Gmail](#)). Oddly, the Salesforce Inbox product does not handle creation of accounts nor does it have a calendar side panel.
5. Navigating, searching and updating Salesforce without leaving the native email or calendar interface
6. Linking documents/attachments
7. Mobile Phone Clients: Many of the vendors offer their own phone clients supporting iOS or Android devices (ZynBit, Cirrus Insight, Salesforce Inbox) while two others (ZynBit and SmartCloud) offer add-ins for Outlook iOS as well. We found that the major thing users want to do with the phone client is link inbound and outbound email and navigate to key Salesforce data from the email. We found the Salesforce Inbox mobile client to be the strongest overall however, its calendar feature has major problems and should not be used. We found the ZynBit mobile client to have the most simplicity and utility, especially for initiating new email to Salesforce contacts. We found the Cirrus Insight client trying to compete with features of Salesforce1 where it's better to have certain functions open up into Salesforce1 like Salesforce Inbox and ZynBit do.

“Most importantly, we find the support for a large variety of clients to be a predictor of the future stability, performance and innovation capabilities of a client.”






































[Steve Roch](#)

VISION, EXECUTION & USABILITY



* Now known as Salesforce Inbox

OUTLOOK DESKTOP, OFFICE 365 AND OUTLOOK FOR MAC 2016

 Outlook	ZynBit	Cirrus Insight	Salesforce Inbox	LFO/LFG*	LinkPoint 360	SmartCloud Connect
Outlook Desktop 2016						
Outlook Desktop 2013						
Outlook Desktop 2010						
Outlook 2007						
Office 365 Web Client						
Outlook for Mac						

When comparing Outlook support, the vendors were evaluated based on two main categories: 1) Outlook Client Support (Desktop and Web) 2) Outlook Support with Exchange Server, Terminal/Citrix Server or Published Desktops.

With Outlook 2016, both traditional Windows add-ins and web-based add-ins are supported. Clients such as Lightning for Outlook and Salesforce Inbox offer only the web-based add-ins and as such offer no support for down-level versions of Outlook. Clients such as Cirrus Insight, ZynBit and SmartCloud Connect offer both installable windows-client add-ins, which are more performant, as well as web-based clients that work for Outlook Desktop or Office365.

OBSERVATIONS

ZynBit supports the broadest range of Outlook Clients. Many large enterprises still require their email to be delivered from an inhouse or collocated Exchange server rather than cloud hosted options and large enterprises often are dealing with divisions

that have different versions of Outlook throughout the organization. ZynBit's strategy is clearly to offer a product built to handle the complexities of the large enterprise.

Linkpoint360 has its roots in Outlook/Exchange and thus supports all the down-level versions. They have fallen behind though with Office365 and Mac support and even Outlook 2016 had some stability issues.

Cirrus Insight has strong Outlook Desktop support however the Office 365 client is noticeably more awkward than all other Office365 app competitors. Their website has install instructions for an Outlook 365 for Mac but we were unable to get it working.

Lightning for Outlook and **Salesforce Inbox** are both fine if only using Outlook 2016 or Office365.

SmartCloud Connect also has its roots in Outlook/Exchange and thus supports all the down-level versions plus a Mac version. Like ZynBit their side-panel is the same technology for both Office365 and Outlook 2016. They do have a windows installable add-in for the older versions of Outlook.

SmartCloud Connect is very focused on the Outlook platform and as such supports the most recent versions of Outlook Desktop (2016, 2013, 2010, 2007) as well as Outlook Web for Office 365. The capabilities across each of the supported versions of Outlook are similar to Zynbit. They also offer Mac support with the same limitations ZynBit has due to the limitations of the Outlook for Mac product itself.

Salesforce Inbox only offers web-based add-in only and thus there is no desktop plug-in currently supported for Outlook meaning Outlook 2007 and 2010 are not supported.



Support of Gmail
(delivered via the Chrome extension)

ZynBit



Cirrus Insight

Salesforce
Inbox

LFO/LFG*



LinkPoint 360

SmartCloud
Connect

OBSERVATIONS

Salesforce Inbox offers the strongest Gmail client if one was only looking at the linking paradigm. They offer a very clever method of prompting the user with the contacts, opportunities, etc... that should be linked AFTER the email is sent, which is by far the most intuitive method that we've seen. Their phone client offers similar linking feature but the Outlook version does not. The problem though with SF Inbox is that it lacks a side panel for Calendar (even though the free Salesforce Lightning product has one) and as noted elsewhere, the Salesforce interaction features are very much downplayed with SF Inbox as compared to every other competitor. Even the free Lightning for Outlook is better. So if it's a robust side panel you want, then look elsewhere but if linking email is the most important thing, SF Inbox is the right choice.

ZynBit's Gmail and Outlook Web functionality runs the same interface and therefore has the same feature set. ZynBit for Gmail has an important differentiator in that the side panel is also available for the Gmail calendar. We find the side panel for calendar particularly useful in preparing for meetings, identifying and adding new contacts that appear in the meeting attendees, and for taking notes about the meeting.

Cirrus Insight began as a Gmail only solution, so there are a few subtle differences between its Gmail and Outlook client. Notably missing from Cirrus Insight is a side-panel for the Gmail Calendar which is huge in our opinion. Also, Cirrus Insight has considerable caching issues when navigating through emails quickly or performing certain actions and then moving on to another email. Their most common technical support reply is "Clear your browser cache" but we became quite weary of this.

Salesforce Lightning supports Gmail, however, during the evaluation it was quite unstable and commonly did not refresh data properly, it often disconnected itself after long periods of down time just when we needed it quickly. Like Zynbit, Salesforce Lightning offers a side panel for the Gmail calendar.

LinkPoint360 does not offer Gmail client support.

SmartCloud Connect has a Gmail client but in testing it was non-functional.



ZynBit

Cirrus Insight

Salesforce
Inbox

LFO/LFG*

LinkPoint 360

SmartCloud
Connect

Mobile Support



In addition to providing a side panel (or plug-in) for email systems, three of the vendors also provided a mobile phone version of their product offering a similar experience to that of their Side Panel and delivered via both Android and iOS. The main value and evaluation criteria was that the mobile solution needed:

- A fully functional email client
- Provide the ability to capture email to the associated Salesforce records, including linking to Opportunities or other objects.
- Ability to select contacts on the To/Cc/From lines and see relevant Salesforce data and related lists.
- Capability to search for Salesforce contacts and initiate a new email to them while simultaneously linking the sent email to the appropriate Salesforce records.

OBSERVATIONS

ZynBit has their ZynMobile application for iOS and Android devices and a Outlook for iOS/Android add-in if one is using the Outlook application from the phone. What we especially like about this client is that it is focused on the major thing users need to do with their email client LINK INCOMING EMAIL and SEARCH FOR and INITIATE NEW EMAIL to existing Salesforce contacts/leads. All the vendors that offer a phone client do a fair job at linking incoming email but ONLY Zynbit offers this easy way to search for Salesforce contacts by Account Name and then initiate new email to one or more contacts. This is especially useful when needing to email multiple contacts at the same account which only ZynBit can currently do. ZynBit could improve it's linking to handle multiple contact linking and related object linking but if simple and fast is what you're looking for, it's a strong client.

ZynBit also offers an add-in to the Outlook for iOS/Android application providing all the same linking and side bar experience of the desktop or web apps.

Cirrus Insight has a strong and stable mobile client. However, we give the nod to Salesforce Inbox first and ZynBit second because we think CI is trying to do too much and missing the little things. They're trying to re-invent Salesforce1 and failing at what we believe is the fundamental tasks of initiating new email and linking incoming email. For example, it is quite difficult just to Search and Initiate a new email to a single contact and it's in fact impossible if you want to search by Account name and initiate an email to multiple people on the To/Cc, like you can do with ZB. We find this to be a very common task.

Salesforce Inbox mobile application provides a fully functional email client including Calendar, Contacts and Tasks. However, the Calendar does not sync from its Office365 properly and should be avoided completely. The client does offer all of the same sales enablement features available from the Salesforce Inbox desktop app. The mobile client is tightly integrated to Salesforce1 such that initiating an email from SF1 will open it into Salesforce Inbox where it can then be linked on its way out. The strongest feature of SF Inbox mobile app is their linking paradigm, whereby after the email is sent it prompts the user to link it to all the appropriate objects including Opportunities or other defined objects related to the contact(s). It is also the only mobile app with the ability to link the email to multiple contacts with a single click. Still, it does not have the simple ability to initiate a new email to multiple contacts at one account like we so often found ourselves using with ZynBit.

SmartCloud Connect does not have a separate mobile app,, however, like ZynBit, it offers a free add-in for Outlook for iOS/Android The add-in is unreasonably slow as compared to ZynBit and suffers the same interface problems as its desktop side panel. However, one can link link the email to multiple contacts and related objects with a single click just like the desktop app.

LinkPoint 360 and **Salesforce Lightning** do not provide a mobile email application. As a separate mobile app, Salesforce1 has limited email capability only providing the ability to send emails without linking them.

Performance, Stability & Implementation



Performance, Stability and Implementation

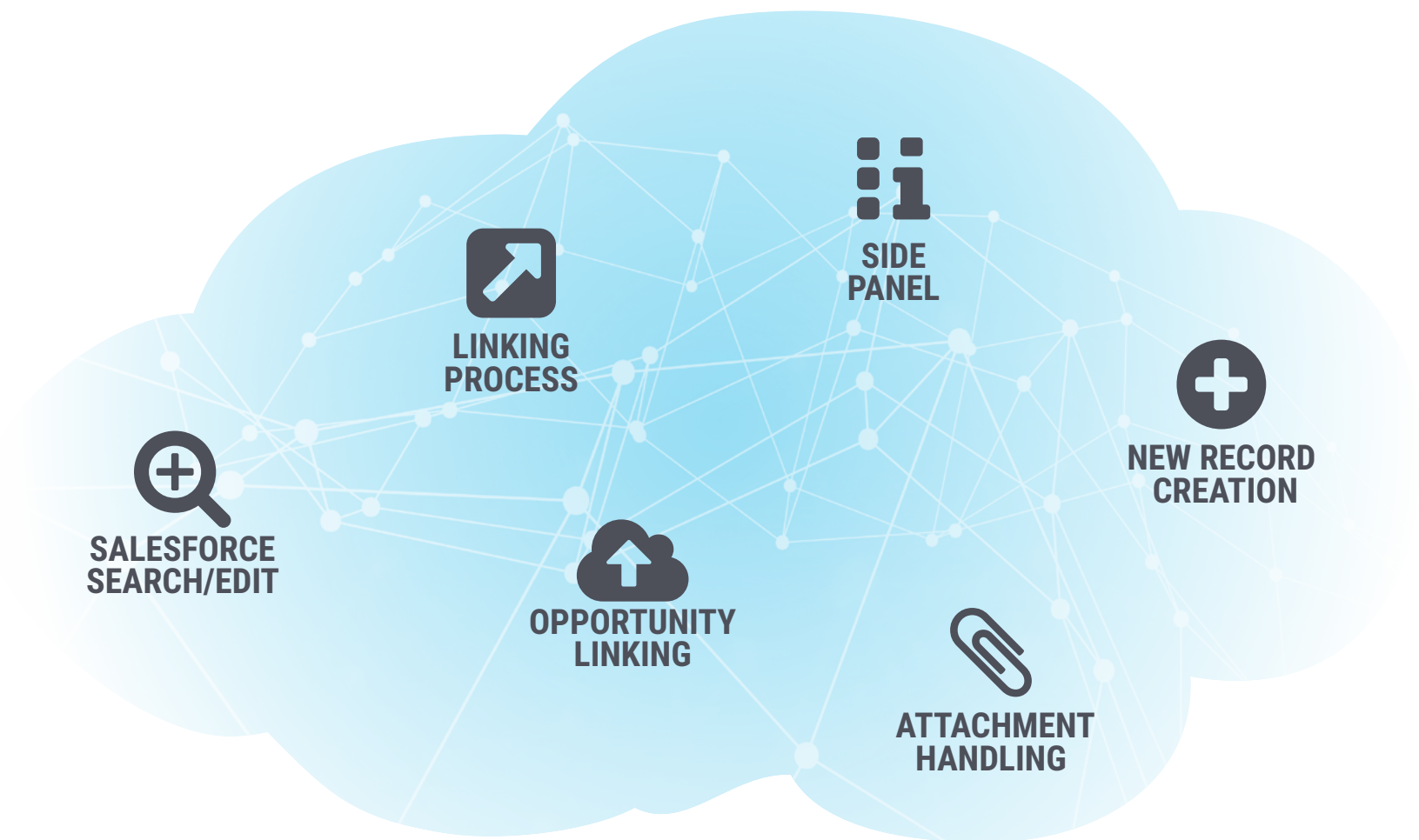
PERFORMANCE & STABILITY

Performance and stability are perhaps the most important features to consider for an application, as it needs to be fast and stable otherwise its features won't really matter. This is also an important factor in gauging the amount of technical support that may be required. Most larger orgs will sacrifice features for stability to ease

their implementation and support burden.

We noticed stark differences in performance with **ZynBit** being much faster than the other clients and with none of the caching and logging out problems that plagued some of the others. The slowest of the clients were **Salesforce Inbox** followed by **SmartCloud Connect** which was plagued by too much interface, its performance

Basic Salesforce Integration



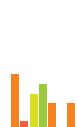
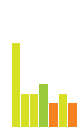

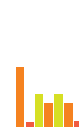








Basic Salesforce Integration


The main premise for this entire evaluation is that the user wants some level of interaction between the email/calendar and Salesforce rather than opting for the fully automated solutions which link emails and calendar items automatically without any user interaction and as a result create a lot of garbage in Salesforce. We lean


more towards the manual linking methods for email but very much recommend the fully automated calendar sync that three of the vendors offer ([ZynBit](#), [Cirrus Insight](#) and [SmartCloud Connect](#)) offer.


BASIC SALESFORCE INTEGRATION OVERALL


	ZynBit	Cirrus Insight	Salesforce Inbox	LFO/LFG*	LinkPoint 360	SmartCloud Connect
CUMMULATIVE SCORE	 22	 15.5	 12	 17	 11	 12
 SIDE PANEL	4	2	1	3	1	1
 LINKING PROCESS	3	2	3	3	2	3
 OPPORTUNITY LINKING	4	2	4	4	2	2
 NEW RECORD CREATION	4	3.5	2	2	2	3
 SALESFORCE SEARCH/EDIT	4	3	0	3	1	2
 ATTACHMENT HANDLING	3	3	2	2	3	1


We defined Basic Salesforce Integration with the following sub-categories and to include the most common tasks and workflows a typical sales user performs as part of their day-to-day email and Salesforce work.


 **SIDE PANEL** Ease of use and completeness of the side panel as a fully working Salesforce environment including interacting with related lists and having a side panel for the calendar.

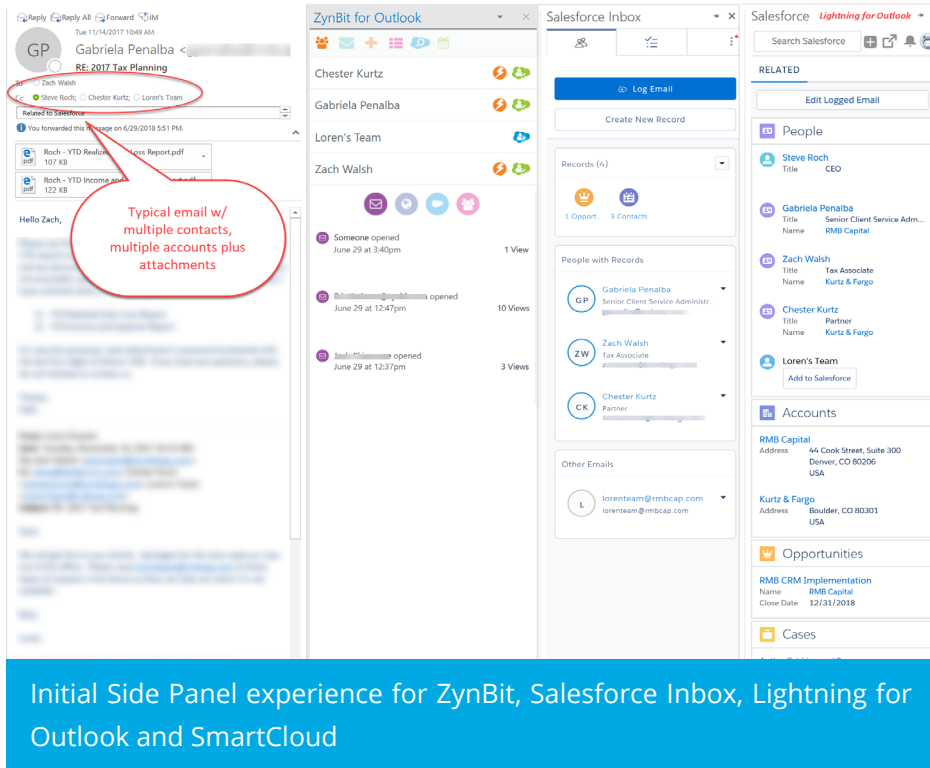
 **LINKING PROCESS** The ease of linking of inbound/outbound email and calendar items to the Salesforce contacts/leads with special attention to multiple contacts on the From/To/Cc which some of the vendors don't handle as well as others.

 **OPPORTUNITY LINKING** Ease and completeness of linking inbound/outbound email/calendar to opportunities and custom objects. Only three solutions handle opportunity matching perfectly (ZynBit, Salesforce Inbox and **Lightning for Outlook/Gmail**).

 **NEW RECORD CREATION** Creation of new Salesforce records from within the apps side panel; leads, contacts, accounts, opportunities and custom objects, from either email or calendar items.

 **SALESFORCE SEARCH/EDIT** Navigating, searching and updating Salesforce records without leaving the native email or calendar interface.

 **ATTACHMENT HANDLING** Linking attachments to either native Salesforce Attachments or Files and a short discussion of those vendors such as ZynBit and SmartCloud Connect that offer alternative storage locations for attachments such as DropBox, OneDrive, SharePoint and others.



|| SIDE PANEL

All of the apps feature a sidebar, and all have different approaches and nuance features. In general, the apps can be categorized into two distinct approaches in their initial view of the side panel.

- 1) List of all Contacts:** Those that initially show all the contacts on the To/Cc/From line in a list and then allow one to drill into specific contacts to see more detail. ZynBit, Smart Cloud, Salesforce Inbox and **Lightning for Outlook/Gmail** are in this category.
- 2) Single Contact:** Those that show the detail of the first contact found on the To/Cc/From. Cirrus Insight and LinkPoint take this approach.

We are absolutely convinced that the first approach shown in the first screen capture is superior because having multiple contacts on the From/To/Cc line is so

much more common than simple one-on-one emails. We found that both Cirrus Insight and LinkPoint suffer greatly when having to deal with more than one contact. We find that it is much more important to see the list of contacts/accounts/opportunities (known and unknown to Salesforce). In particular, the 2nd approach often has us missing key contacts, accounts and opportunities otherwise shown in the first approach.

Additionally, the first approach is superior for the task of quickly linking the email. All vendors that use the list approach make it simple to link the email to all of the various contacts and other Salesforce objects.

ZynBit

- Light, no frills initial experience makes it the most performant & stable of all the apps
- Drilling into Contacts offers a combined view of Account related lists and Contact related lists making it easy to see related opportunities.
- Detail and Related Lists (including custom objects) pulls from page layout and compact layout definitions automatically, including custom objects. No configuration required. Easiest to deploy.
- All editing and record creation can be done without ever going to Salesforce.
- **Opportunity Display/Linking:** One of only three vendors to properly show Opportunities whether related only by Account or by OpportunityContactRole.
- **Calendar:** Side Panel available for the Calendar – super useful for meeting prep and adding new contacts to Salesforce. Big differentiator for ZB is that the side panel appears in the larger calendar (preview) view in addition to when the calendar item is opened. This is an absolutely awesome feature.

Cirrus Insight

- Appealing interface but in practical usage the single contact approach is the least efficient.
- Uses the single contact approach so it's awkward to navigate through multiple contacts and easy to miss contacts that should be added to Salesforce.
- Plagued by severe caching issues that are easily reproducible, where side panel gets stuck on previous contacts or doesn't show updated contact data

from Salesforce, common tech support response “Clear your cache.”

- To much emphasis on Email Tracking and Opportunities. Email Tracking is demonstrably inaccurate with many false positives and Opportunities only works if OppContactRole is set for the contact.
- Detail and Related Lists (including custom objects) pulls from page layout definition automatically. Users can hide fields and related lists whether this is good practice or not.
- All editing and record creation can be done without ever going to Salesforce.
- Nice open/history Activity Review from within side panel
- **Linking Process:** Linking email to more than one contact is a nightmare or repeating the linking for each contact.
- **Opportunity Display/Linking:** Relies solely on the OpportunityContactRole relationship to offer up the Opportunities.
- **Calendar:** No side panel for the Calendar is a deal killer given that so many other apps have it.

LinkPoint

- Weakest of all apps because detail and related lists are hard-coded to standard objects only and do not pull from the page layout at all. Thus, no custom field or custom object support.
- Uses the single contact approach so it's awkward to navigate through multiple contacts and easy to miss contacts that should be added to Salesforce.
- Makes an awkward attempt to allow some editing of detail fields in side panel with it's Quick Form, all updates/creation of related list data pushes the user up to Salesforce pages.
- No dedicated Account page – must navigate up to Salesforce
- **Opportunity Display/Linking:** Relies solely on the OpportunityContactRole relationship to offer up the Opportunities.
- **Calendar:** Makes an attempt at the side panel for Calendar but only works in one scenario, buggy.

Lightning for Outlook /Gmail

- Clean and robust side bar experience. Card view for related lists turns out to be a little clumsy to work with though.
- Initial view shows lists of Contacts, Accounts, Opportunities and Cases.
- Drilling into any object shows the perfect rendition of fields and related lists pulled from the page layout including custom fields, custom related objects and even embedded VF pages.
- Edits to detail data can be performed in Side Panel but any updates/creation of new Related List records pops one into a Salesforce browser page.
- No new Account or Contact creation (only Leads). This feature was hobbled recently probably to push orgs to purchase Salesforce Inbox.
- **Opportunity Display/Linking:** One of only three vendors to properly show Opportunities whether related only by Account or by OpportunityContactRole.
- **Calendar:** Side Panel available for the Calendar items. The Side Panel is not available in the Calendar Preview like ZynBit, it is only available in the single Calendar Item view. However, because it cannot be pinned, it is obscenely slow to invoke and refresh in Outlook. Oddly, in the Gmail version it does automatically pop-up for calendar items like ZynBit for Outlook/Gmail.

Salesforce Inbox

- Initial view shows lists of Contacts and Opportunities and any other objects (needs to be configured per user for additional objects and custom objects).
- They've made a concerted effort to downplay the Salesforce integration in the side panel as hardly anything can be seen or done from the side panel. All hyperlinks push the user to Salesforce web pages.
- Weakest of the side panels if one wants to work with Salesforce data in the side panel.
- **Opportunity Display/Linking:** One of only three vendors to properly show Opportunities whether related only by Account or by OpportunityContactRole.
- **Calendar:** No side panel for the Calendar is a deal killer given that so many other vendors have it.

SmartCloud Connect

Zynbit

- Combines Contact & Account Related Lists
- Automatically reads page layouts, including custom obj
- Zero configuration needed

Salesforce Inbox

- Practically no related lists or edit capability
- Custom objects require config (per user)

Lightning for Outlook

- Automatically reads page layouts
- Zero configuration needed
- Card view is inefficient
- Need to drill up to Accounts to see its info

SmartCloud Connect

- Custom objects only appear via Customization tool (per user)
- 3 Clicks to get here
- Need to drill up to Accounts to see its info

LinkPoint

- Doesn't read from the Page Layout related lists at all
- No custom objects support

Cirrus Insight

- Automatically reads page layouts
- Zero configuration needed
- Extra clicks to get to related info and no record counts
- Need drill up to Account to see its info

Contact Detail views of all the vendor side panels side-by-side

- Initial view shows lists of Contacts, Accounts, Opportunities and Cases plus any other object defined via a configuration tool.
- Very cluttered and confusing initial experience, even customization tool doesn't make this much better.
- Slowest by far of all apps because it's trying to do so much.

- Powerful configuration abilities allow for some better layout options but hard to overcome all the clutter and poor HTML formatting in some areas.
- Working from the "Detail View" one can view and edit record detail and create new Related List data directly within the side panel.
- DOES NOT automatically read page layout fields or related lists. Requires use of the customization tool to expose custom object related lists. This will make

implementation in a large org a nightmare.

- **Opportunity Display/Linking:** Supports only the Account relationship to
- Opportunity, no OpportunityContactRole. Some odd inconsistencies for Opportunity display in different areas of interface will cause user confusion.
- **Calendar:** Side Panel available for the Calendar – super useful for meeting prep and adding new contacts to Salesforce. Not available in the Calendar Preview like ZynBit but available in the single Calendar Item view.

EMAIL LINKING PROCESS AND LINKING TO OPPORTUNITIES

The act of linking the email should be carefully considered. Most of the vendors offer a “quick” method that links the email to all contacts and one or more related objects all from one screen. ZynBit takes the “quick” linking to the extreme with a single click of their Lightning Bolt linking all contacts and objects without even a pop-up screen.

Zynbit

- Linking is a single click via the Lightning Bolt versus pop-up screens
- Lightning Bolt method allows one to link email to any number of RelatedTo objects such as two opportunities or an opportunity, invoice and project.
- One of only three vendors to properly show Opportunities whether related only by the Contact.Account→Opportunity.Account relationship or by OpportunityContactRole.
- Ability to search for objects/records and link to completely unrelated objects.

Cirrus Insight

- Offers an automatic linking method for outbound email but we do not recommend it as every email is linked indiscriminately.
- CI falls down pretty quickly if the email must link to more than one contact or to more than one RelatedTo object.
- Relies solely on the OpportunityContactRole relationship to offer up the Opportunities for linking. Many customers don’t use OppContactRoles and

“The most common task is the ability to link an email to an opportunity. Therefore, the ease in which an app can perform this task is important. Notably Salesforce for Outlook & ZynBit were the easiest to link emails to opportunities.”

Steve Roch

they are not set automatically by Salesforce. One must then manually look-up the Opportunity.

- If the OppContactRole is set though, the Opportunity is automatically suggested.
- Nice feature to remember the most recent RelatedTo object.
- Ability to search for objects/records and link to completely unrelated objects.

LinkPoint

- Linking paradigm is pretty good as all contacts are linked at once and for outbound email the linking is done via the Send & Record in one nice step.
- Relies solely on the OpportunityContactRole relationship to offer up the Opportunities for linking. Very weak in this respect since most customers don’t use OppContactRoles and they are not set automatically by Salesforce. One must then manually look-up the Opportunity.
- If the OppContactRole is set through the Opportunity is automatically suggested.
- Ability to search for objects/records and link to completely unrelated objects.
- Supports only one RelatedTo field. If one wants to link the email to an Opp and one or more custom objects the process would need to be repeated.

Lightning for Outlook/Gmail

- Linking paradigm is nice as all contacts are linked at once.
- Strong linking paradigm offering up all the contacts and automatically suggesting

Opportunities correctly (via either the Opportunity.Account relationship to the contact or via OpportunityContactRoles). This came in a recent update.

- Recent update provides ability to link email to custom objects and to search and link to completely unrelated objects. Big improvement.
- Supports only one RelatedTo field. If one wants to link the email to an Opp and one or more custom objects the process would need to be repeated.

Salesforce Inbox

- A little awkward to link Incoming email because sometimes it reverts to a profile page which doesn't have a LINK (Log Email) button. Then other times it defaults to the Log Email page. Odd?
- Big differences in linking outbound email between Outlook and the Gmail/iOS versions. Gmail/iOS versions are outstanding in that they prompt to link the email to all the proper objects AFTER the email is sent for a very fluid workflow. The Outlook version behaves like the other apps where one manually links prior to pressing SEND.
- Both versions offer a strong linking paradigm offering up all the contacts and automatically suggesting Opportunities correctly (via either the Opportunity.Account relationship to the contact or via OpportunityContactRoles). Additional objects must be turned on via configuration.
- No method to Search for objects/records and Link to completely unrelated objects.

SmartCloud Connect

- Strong linking paradigm which offers up all the possible objects and records that one might link to in a single screen.
- Easy to link multiple contacts and even multiple RelatedTo objects with a single screen and click
- Relies solely on the Contact.Account→Opportunity.Account relationship to offer up the link to Opportunities.
- Opportunity linking and display is demonstrably inconsistent. Sometimes the opps are there and other times they are not.
- No method to Search for objects/records and Link to completely unrelated objects.

ATTACHMENTS HANDLING

ZynBit

- Unintuitive location for attachments located in the File Email option under Action Menu. The action menu is the real problem not the attachments. But you get used to it.
- Only app that saves the attachments to both the Salesforce Task and whatever RelatedTo object is specified, useful for linking the attachment to the Opportunity. BIG useful differentiator!
- Ability to link the attachment to any object independently of the email and without even linking the email if desired.
- One of only two vendors to offer alternative storage locations for attachments such as Salesforce Files, DropBox, Box, SpringCM, Sharepoint, GoogleDrive, OneDrive.

Cirrus Insight

- Intuitive interface for attachments.
- Attachments only link to the Task/Email but Salesforce Accounts knows to display attachments linked to Email. So we think this is the correct behavior.
- No ability to save attachments to the RelatedTo object (such as the opportunity)

LinkPoint

- Intuitive and prominent interface for attachments.
- Robust attachment handling. Settings to ignore defined file extensions.

Lightning for Outlook/Gmail

- Intuitive location
- More often than not the attachments are jpegs and other garbage files embedded in the email.

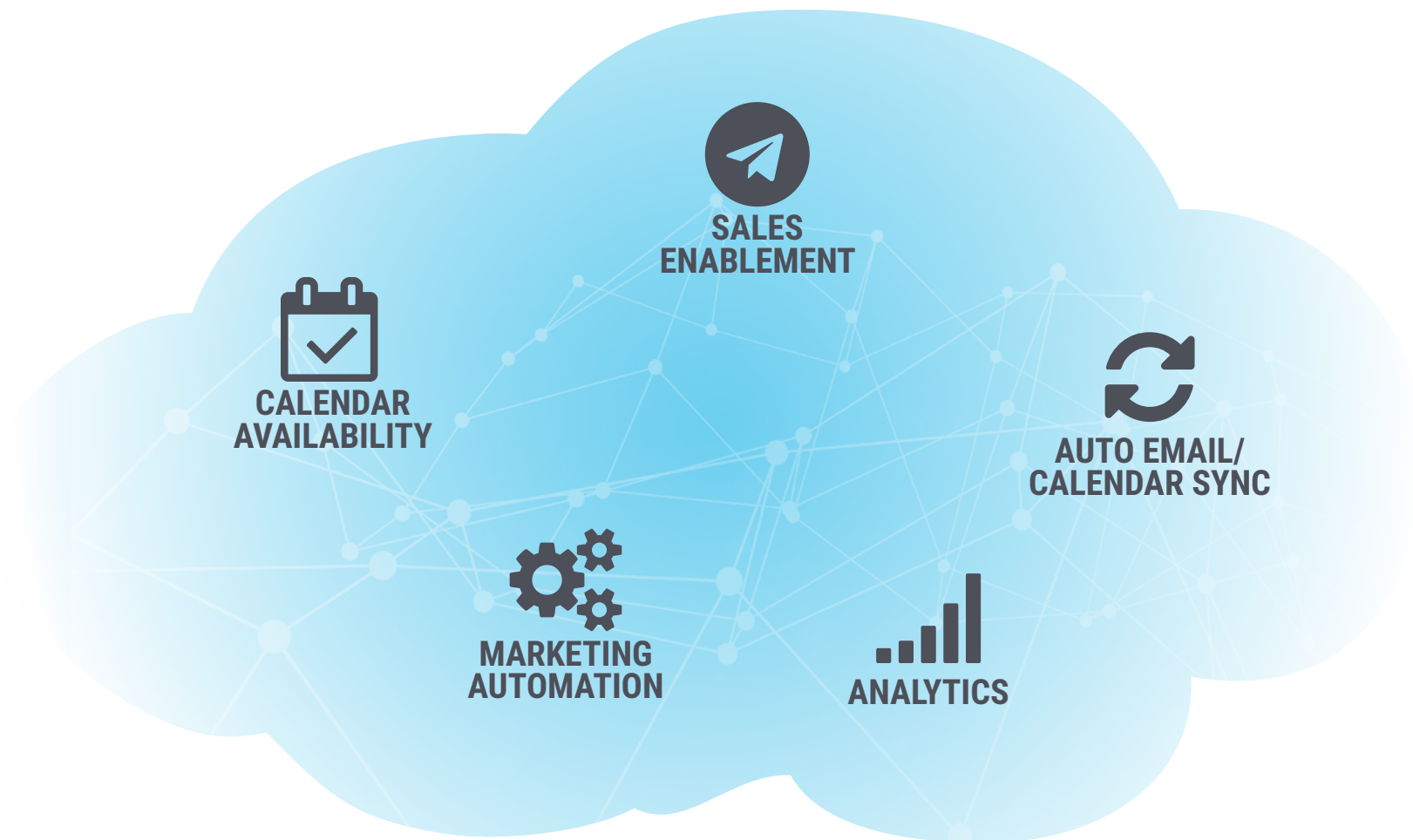
Salesforce Inbox

- No ability to pick and choose which attachments. All or Nothing.
- Attachments checkbox is TRUE by default. Every Admin's nightmare.
- Includes garbage .jpegs from signatures

SmartCloud Connect

- Unintuitive location for attachment management, really hard to find.
- No interface whatsoever to link the attachment for outbound email. One must go to the sent mail and re-link the email.
- Does have the ability to file the attachment to any object and independent of the email.
- One of only two vendors to offer alternative storage locations for attachments such as Salesforce Files, DropBox, Box, SpringCM, GoogleDrive, OneDrive.












Advanced Features



Advanced Features

The research revealed a high degree of variation amongst the vendors for advanced features wherein specific categories only one vendor retained the capability and therefore each advanced feature was listed out separately to provide due credit in

each area. For simplicity, all advanced features have been aggregated into a single category with a relative weighted score.

	ZynBit	Cirrus Insight	Salesforce Inbox	LFO/LFG*	LinkPoint 360	SmartCloud Connect
CUMMULATIVE SCORE	 10	 15	 12	 1	 1	 10
 SALES ENABLEMENT	1	2	4	1	1	1
 CALENDAR AVAILABILITY	3	2	3	0	0	4
 AUTO EMAIL/CALENDAR SYNC	3	3	0	0	0	4
 ANALYTICS	3	4	2	0	0	1
 MARKETING AUTOMATION	0	3	3	0	0	0

SALES ENABLEMENT & ACCELERATION

Sales enablement and acceleration features are the collection of features such as:

- Email Templates & Short Cut Text
- Send Later or Scheduled Email
- Remind me if no response
- Batch Email

Salesforce Inbox dominates this category for its best implementation of Email Templates, its novel Short Cut Text feature and it's Send Later(scheduled email) feature which allows the sales rep to write an email now and have it delivered hours,

days or weeks from now. It even has a “Remind Me if No Response” feature to remind the user of emails that have not been responded to in a defined time period. Lastly, Salesforce Inbox offers a simple but highly useful batch email feature utilizing the same Email Templates and batch email that Salesforce offers but is too difficult to use in Salesforce proper.

Cirrus Insight also has noteworthy Sales Enablement features such as Email Templates and a Send Later option (only available for Gmail) as well as their Flight Plans light marketing automation (again only available for Gmail). However, these two options do show how Outlook is an afterthought to Cirrus Insight.

CALENDAR AVAILABILITY TOOLS

Calendar Booking Tools are now critical in the sales workflow and most of the vendors now offer one of two options for making the users availability known to the customer and of course allowing the customer to then book a meeting without all the back and forth emails, checking for availability.

There are two approaches that the vendors take, each with their own pros and cons.

1) The Fully Available Calendar as a link

Pros

- The absolute best CUSTOMER experience. Empowers the customer to pick a time that is convenient for them. After all, do you want to be selfish and offer them a time that works for you or a time that works for them?
- Embedding the link in your signature “Book a Meeting” is a one-time only event
- The customer is more likely to find a time that works for them and ultimately the meeting is more likely to get booked than pushing them for a certain day/ time.
- Well suited for early lead development when getting the meeting is more important than a big push for a specific date/time.

Cons

- The user needs to keep their calendar accurate and block out times that they don’t want to meet. However, we find that it’s not a big deal once the meeting is booked to change the time, 99% of the time the customer accepts the new time.
- A calendar with a lot of open meeting slots can give the customer the impression that you aren’t very busy and therefore not in demand.
- The meetings generated are named with generic subjects requiring the user to then update the Outlook Meeting to something meaningful after it has been created. SmartCloud’s approach however does allow one to create the full calendar availability link while still giving the meeting a unique Subject and other details.

2) The Time Picking or Choose Availability method.

Sales user picks specific time slots and those are offered as buttons in the email.

Pros

- Sales users we surveyed initially preferred to pick the times rather than offering a wide-open calendar. They believe that it’s the job of the salesman to drive the customer to do what they want to do and on their timeline. However, we mostly found this was just an insecurity in having the full calendar published even though no details are shown.

Cons

- This is selfish and poor customer experience as you are pushing the customer into timeslots that may not work for them or when they get around to picking the slot, the time slot is no longer available. This is a frustrating customer experience.
- If the sales user doesn’t offer up a suitable time slot, it’s back to the same old game of emailing back and forth for a mutual time.
- This method is considerably more time consuming for the user to pick time slots.
- Often the times chosen are no longer available when the customer eventually gets around to booking the meeting. All the vendors handle this scenario well though and do not allow double-booked meetings but it is indeed frustrating to the customer.

	Time Picker	Full Calendar
ZynBit	✗	✓
Cirrus Insight	✓	✗
LinkPoint	✗	✗
Lightning for Outlook/Gmail	✗	✗
Salesforce Inbox	✓	✗
SmartCloud Connect	✓	✓

AUTOMATIC EMAIL/CALENDAR SYNC

Many customers and specific industries require every email interaction and calendar item to be captured in Salesforce. Only the three vendors offer these features, with one (SmartCloud Connect) offering the most robust solution both on the email side where emails automatically link to opportunities and on the Calendar where they make a distinction between Meetings with and without attendees so that if desired one can disable sync for calendar items that aren't customer related, i.e. Doctor's Appointments, Job Interviews, etc. This an important differentiator because we've heard to many horror stories of undesirable calendar items inadvertently syncing to Salesforce.

	AUTO EMAIL SYNC	AUTO CALENDAR SYNC
ZynBit	✓	✓
Cirrus Insight	✓	✓
LinkPoint	✗	✗
Lightning for Outlook/Gmail	✗	✗
Salesforce Inbox	✗	✗
SmartCloud Connect	✓	✓

MARKETING AUTOMATION

Only two solutions offer any sort of Marketing Automation type features.

Salesforce Inbox offers a very useful and intuitive batch email feature utilizing standard list views plus Salesforce Email Templates. Sending batch emails is much easier in SF Inbox than from the Salesforce system itself.

Cirrus Insight has an extra module called Flight Plans (Gmail only) which allows users to place contacts into flight plans which are basically Campaigns and then execute pre-determined emails at specific intervals similar to more robust marketing automation solutions.

ANALYTICS

Many of the vendors offer Email Open tracking or notifications as well as Link tracking features.

ZynBit

- Has special code to not report all the false positives that plague Cirrus Insight and Salesforce Inbox
- No aggregate reporting per Contact, only see analytics when re-opening the same email.

Cirrus Insight

- Lots of false positives (such as opening your own sent mail)
- Nice push notifications on mobile phone when using the CI Mobile Client
- Best reporting of all the email opens and web hits

LinkPoint

- Claims to have open and link tracking but we've never gotten it to work

Lightning for Outlook/Gmail

- No email open or link tracking

Salesforce Inbox

- Lots of false positives (such as opening your own sent mail)
- Nice push notifications on mobile phone when using the Salesforce Inbox Mobile Client
- Aggregate Reporting by Contact in a separate web page invoked by the Read Receipts menu item.

SmartCloud Connect

- Claims to have open and link tracking but even we've never gotten it to work even after contacting their technical support.

Would You Like To Learn More About This Research?



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