Competitive Analysis

Two focuses from each target group:

Focuses	Competitors
Merchant Management Platform for Restaurateurs	Lightspeed Deliverect Butlaroo Uber Eats SiteDish
Admin Service CRM Platform for Vendors	Hubspot Zendesk Zoho Pipedrive

Must-Have features of a CRM platform:

1. Workflow automation
2. Onboarding
3. Analytics & real-time data
4. Reporting
5. Email management & handling
6. Team collaboration
7. Security and compliance
8. Employee tracking
9. Third-party integration
10. Personalization & customization
11. Task-related messages
12. Customer service
13. Forecast & prospecting

Admin Platform for Vendors

Admin platform for vendors are associated with the management of acquired restaurateurs, and the handling of such between vendors and their restaurateurs. The platform utilizes CRM systems that specializes with customer care and handling, often associated with Service CRM Systems.

Service CRM systems are CRM systems designed to help assist in customer management and interaction within an organization. The main purpose of a Service CRM system is to streamline and optimize customer service processes, and improve the overall customer experience.

Typical features include, but not limited to:

a. Case management
    Tracking customer requests from multiple channels (phone, email, social media)

b. Knowledge management
    Centralizing information with providance of knowledge to agents to help resolve customer issues

c. Analytics and reporting
    Tracking and analyzing customer interactions, service performance and customer satisfaction metrics

d. Self-service portals
    Providing customers access to information, support resources (docs, FAQs) and ability to track down their own requests

e. Multi-channel support
    Enabling agents to handle customer interactions across multiple communication channels

Service CRM systems can help organizations improve customer satisfaction, increase efficiency, and reduce operational costs by automating repetitive tasks and providing a centralized view of customer interactions and information.

Competitor	Features	Description	Affiliated Feature
HubSpot Service Hub	Guided Onboarding & Registration	Multistep onboarding with guidance via pop-ups and centered options	Onboarding
	Extra layer of Onboarding via traineeship	Extended onboarding via crash course practice with completion/progressbar	Onboarding
	Tailoring based on preference of usage	Choice within onboarding that asks user which field of expertise they specialize in and for what purpose are they using this platform	Personalization & customization
	Customer service integration with Whatsapp		Third-party integration Customer service
	Inbox	Contains all related messages, tickets, and other communication methods	Email mgmt Task-related msgs
	Livechat connection & Chatflow creation	Livechat features + ability to create custom chatflow interaction with visitors of web-products	Customer service Workflow automation
	Form connection and automation	Connect and respond to submission forms via inbox	Workflow automation Customer service
	Tickets	List of issues/requests from customers. Comes with basic filtering	Customer service
	Contacts & calls list	List of all gathered contacts, calls, potential leads available	Analytics & real-time data
	Export Data	Able to export data into CSV format	Reporting
	Create Your Own Dashboard	Customizable dashboard filled with templates tailormade according to which data you need to view. Can create and have multiple dashboards	Workflow automation Analytics & real-time data
	Account & Data management	Manages data, general compliance, security, preferences, users and teams available	Security & compliance Team collaboration Employee tracking

Pros	Cons	
1. Cohesive design elements throughout the platform 2. Clear distinctions between specific pages (headers, page numbers) 3. Presence of pop-up guidance through every page 4. May be easy to follow for new users 5. Option to close all hints/guides 6. Progressbars available for estimation of user's mastery on the platform	1. Not mobile-friendly 2. Too much clutter of instructions	

Competitor	Features	Description	Affiliated Feature
Zendesk	Onboarding w/ multistep		Onboarding
	Verification via direct open link for SSO login/resgistration		Onboarding
	In-app onboarding	Clear with instructions, progressbar and completion status Demo videos available, and customer stories (of those that use Zendesk)	Onboarding
	Account management and team member management		Personalization & customization Employee tracking
	Email, Livechat, and Help center Customer service		Customer service Workflow Automation Email mgmt
	Ticketing system		Cust service
	Designing tools	Design tools available for custom design sites using pre-built templates	Personalization & customization
	Reports and analytics via Zendesk Explore	Data viewing, real-time visualization	Analytics & real-time data Reporting
	Apps and integrations	Connecting business tools and other external third party apps via Zendesk Marketplace	Third-party integration
	Livechat customer support for users of platform	If help is required, it is possible to ask chatbot within platform	Customer service

Pros	Cons
1. Simple organization-based interface 2. Management mostly in one place 3. Grouped configurator tools 4. Great use of colors and negative space 5. Guided tooltips and pop-up guides 6. User-friendly onboarding experience 7. Real-time data and reporting generation based on existing tickets	1. Not mobile-friendly 2. Hidden configuration tools 3. Usage of in-app tabs which may clutter workspace

Competitor	Features	Description	Affiliated Feature
Zoho CRM	Lead & Contact & Customer management	List of contacts, leads and customers available for sorting, filter and management	Email mgmt task-related msgs cust service
	Task & meeting mgmt	Manage tasks and meetings available	task-related msgs
	Homepage customization	Customizable homepage filled with templates tailormade according to which data you need to view. Can create and have multiple homepage	Workflow automation Analytics & real-time data Personalization & customization
	Real-time notifications (aka Signals)	Configure alerts and notifications	Task-related msgs Customer service
	Calendar view	View, amange and make future plans with calendar view	Forecast & Prospecting

Pros	Cons
1. Modular cards at dashboard 2. Straightforward layout 3. All actions are presented upfront 4. Filter system available at all list mgmts on the left side of the screen	1. No onboarding 2. Not mobile-friendly 3. Requires high technical jargon to manage 4. Cluttered interface 5. Not the most responsive site 6. Overwhelming pages

Competitor	Features	Description	Affiliated Feature
Pipedrive	Onboarding	Presence of user onboarding including preferencial usage and job positions	Onboarding
	Data Import	Import existing data files	
	Email and Calendar Sync	Synchronize email inbox and calendar	Email mgmt and handling Third-party integration
	Contacts Sync	Synchronize existing contacts	Third-party integration
	App integrations via Marketplace	Integrate with apps from Marketplace	Third-party integration
	Pipedrive Mail	Check mails and inboxes within Pipedrive	Email mgmt
	Lead and Sales Management	Manage potential leads and sales, including forecasting features	Forecast & Prospecting
	Dashboard Insights	Sees insight of data within dashboard. Able to add and remove cards/modules	Analytics & real-time data Personalization & customization
	Sales forecast	See forecast based on data inputs	Analytics & real-time data
	Project Management	Conduct and manage projects within Pipedrive's CRM	Team collaboration Employee tracking
	Multiple dashboard creation	Able to create multiple dashboards according to different needs and scenarios	Personalization & customization

Pros	Cons
1. Fresh and balanced interface between functional and aesthetic (Aesthetic-Usable) 2. Available recommended add-ons per feature 3. Modular cards that are movable via drag and drop function within dashboard 4. Encouragement of integration with other apps 5. Abundant combination usage of text and illustrations 6. Clear navigation and user error 7. Usage of multiple sidebars for shell-navigation	1. Too much persuasive attempts at user 2. Not mobile-friendly 3. Hidden subscription plans within platform

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