insightly
BY UNBOUNCE

CRM 8 vendor comparison guide

For mid-sized businesses

:copper

HubSpot

monday.com

Nutshell

pipedrive

salesforce

ZOHO

How to use this guide

First of all....you've got this.

Choosing a CRM is a critical decision for your organization. You're already taking a major step towards success by thoroughly researching your options. This guide contains key comparison data you'll need to make an educated decision in selecting a CRM that will grow with your business.

You can use it to compare pricing, terms, and rankings. You'll be able to ensure you get the features that your organization requires. Plus, you'll see which platforms can help unify your teams and increase customer happiness.

Contents

Copper vs. Insightly

Edge to Insightly for integrations

Copper

Copper is a CRM with useful features for small businesses. It scores well on the essential functions of a CRM.

Keep in mind that lower priced plans don't allow for integrations to essential business apps like Slack, MailChimp and Docusign, so you'll miss out on the benefits of having your CRM talk to other apps.

Insightly

Insightly is a modern CRM which makes it very easy to integrate. In addition to native integrations, Insightly also offers AppConnect, a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company.

Insightly is easy to learn and adopt and provides quick time to value.

"Insightly empowers our team to easily customize fields, processes and automations on the fly. You don't need to be a developer to do this—it just works so seamlessly. Insightly helps us deliver a bespoke experience for all of our customers."

Chris Benham
Director, The Village Goldsmith

	:copper	insightly BY UNBOUNCE
TrustRadius Rating	★ ★ ★ ☆ ☆	★ ★ ★ ★ ☆
Pricing	$29 - $129 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner		●
Workflow Automation	●	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	● (Professional & Business only)	●
Role-based Permissions	● (Professional & Business only)	●
Configurable Profiles & Page Layouts	● (Limited Professional & Business only)	●
Integrations	● (Professional & Business only)	●
Task and Event Management	●	●
Free Trial	●	●
Marketing Automation	● (Limited features, highest plan level only)	● (Additional fee)
Project Management	●	●
Service Management		● (Additional fee)
Mobile App		●
Best Feature (Per TrustRadius)	Contact & Account Manager	Customer Data Management / Contact Manager

Hubspot vs. Insightly

Insightly wins on easy customizations & integrations

Hubspot

HubSpot started as a marketing automation platform and it uses its CRM as an entry point to move customers into marketing software contracts.

This is evident in that its best features are related to email. It is robust out of the box, but advanced customizations can be limited. HubSpot is described as a closed system where you'll get the most out of it when you use all of its components rather than the tools you may already have in place. The small number of integrations that are available are easy to use. Building reports can be a challenge, so you may need to have some expertise on your team or hire an external integrator to get the most from the system. Expect all users to spend some time in their online Academy for training.

Insightly

Insightly's CRM came first and marketing and services apps were built later using the same data set to promote alignment and provide an elevated customer experience.

Insightly aligns sales and marketing teams seamlessly with better transparency, and consistent information about customer health. Insightly AppConnect is a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company. Insightly is highly customizable to fit your business and dashboards simplify results for reporting across teams. With an intuitive interface and a service team to guide you along the way, Insightly is easy to learn and adopt and provides quick time to value.

"In less than a year, we've expanded our program from 2-3 campaigns a month to 12 unique campaigns, and we're continuing to grow. Using advanced segmentation in Insightly has doubled our lead pipeline and deal conversion through more effective targeting."

Jordan Horn
Email Campaign Marketing Manager, Barrier Companies

	HubSpot	insightly BY UNBOUNCE
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	$0 - $120 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner	●	●
Workflow Automation	●	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions	●	●
Configurable Profiles & Page Layouts	● (Enterprise)	●
Integrations	●	●
Task and Event Management	●	●
Free Trial	●	●
Marketing Automation	● (Additional fee)	● (Additional fee)
Project Management	●	●
Service Management	● (Additional fee)	● (Additional fee)
Mobile App	●	●
Best Feature (Per TrustRadius)	Email Marketing	Customer Data Management / Contact Manager

Monday vs. Insightly

Insightly is a true CRM and a PM tool

Monday

Monday is not built to be a CRM, but has some features that make it work in that capacity. It is designed as a project management tool.

For instance, you'll use columns designed to manage projects and instead put leads and contacts in them for action. The mission of Monday is to help you to better organize your tasks among your team - not to manage customer relationships.

You can find many CRMs on the market designed specifically for a sales leader vs. being designed for a project manager.

Insightly

Insightly is purpose built to align sales, marketing and service in one platform. It also offers marketing and customer service apps that use the same data set available to promote alignment and provide an elevated customer experience.

Insightly AppConnect is a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company. Insightly is highly customizable to fit your business. With a simple, intuitive interface and a service team to guide you along the way, Insightly is easy to learn and adopt and provides quick time to value.

"Adopting Insightly has helped us close deals faster because the entire team collaborates on providing mission-critical detail in the CRM. From my perspective as a sales leader, the support I get from the team to capture this information and close opportunities is absolutely critical to our success."

Ian Pund

Senior Vice President, Sales, Noble BioMaterials

	monday.com	insightly
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	$0 - $16 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner		●
Workflow Automation		●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions	● (Enterprise)	●
Configurable Profiles & Page Layouts		●
Integrations	● (Limited number)	●
Task and Event Management	●	●
Free Trial	●	●
Marketing Automation		● (Additional fee)
Project Management	●	●
Service Management		● (Additional fee)
Mobile App	●	●
Best Feature (Per TrustRadius)	Tasks & Event Manager	Contact & Account Management

Nutshell vs. Insightly

Easy integrations move Insightly ahead

Nutshell

Nutshell CRM is made for small outbound teams. It has a steeper entry point than most CRMs at $20/user per month with no free or low-cost option available to start-ups.

Nutshell has a few key integrations with email apps and productivity tools, but the number of integrations is limited. They recently added a marketing automation function that is priced per user.

There is a limit to how much users can customize the front end look and feel, which could be a benefit for small companies looking for an out-of-the-box solution.

Insightly

Insightly is a modern, scalable and affordable CRM.

Insightly AppConnect is a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company.

Insightly is highly customizable to fit your business. It's easy to use features like custom fields and custom objects to make it work efficiently for your teams.

Insightly is easy to learn and adopt and provides quick time to value.

"Our motto is this: If it's not in the CRM, it didn't happen. If you have an idea, explore it. Get the process on a whiteboard and work with your Insightly team to see if it's possible. Odds are, the answer is yes."

Jennifer Nietz
Vice President, COACT

	Nutshell	insightly BY UNBOUNCE
G2 Rating	★★★★☆	★★★★☆
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	$20 - $42 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner		●
Workflow Automation	●	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions		●
Configurable Profiles & Page Layouts		●
Integrations	●	●
Task and Event Management	●	●
Free Trial		●
Marketing Automation	● (Additional fee)	● (Additional fee)
Project Management		●
Service Management		● (Additional fee)
Mobile App	●	●
Best Feature (Per TrustRadius)	Contact & Account Management	Contact & Account Management

Pipedrive vs. Insightly

Insightly wins by aligning teams in one tool

Pipedrive

Pipedrive is a CRM with useful features for small businesses. It scores well on the essential functions of a CRM, but you'll need to choose another vendor for marketing automation and service management.

Look through the pricing carefully – some functions you may consider essential can be part of their flexible 'add-on' model. The interface can be complex until you've mastered it, so allow time for adoption.

Insightly

Insightly is a modern CRM that is feature rich and easy to use. Insightly also offers a marketing automation application and a customer service application so that go-to market teams can use the same data set to promote alignment and provide an elevated customer experience.

Insightly AppConnect is a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company

"We originally used Pipedrive to manage our business development initiatives, but we needed a system that could streamline the handoff from sales to customer success. Insightly allows us to convert opportunities to projects and put the project through a different pipeline, which is fabulous. I've never seen another system do that, and I've worked with several CRMs during my career."

Simon Donovan
Head Of Business Development, We Got POP

	pipedrive	insightly BY UNBOUNCE
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	$12.50 - $99 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner		●
Workflow Automation	●	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions	●	●
Configurable Profiles & Page Layouts		●
Integrations	●	●
Task and Event Management	●	●
Free Trial	●	●
Marketing Automation		●
Project Management		● (Additional fee)
Service Management		●
Mobile App	(Business Card Scanner Only)	● (Additional fee)
Best Feature (Per TrustRadius)	Contact & Account Management	Contact & Account Management

Salesforce vs. Insightly

Drastically lower total cost of ownership with Insightly

Salesforce

Salesforce is an investment suited for large scale enterprises like Fortune 500 companies. It requires expensive third party partners to implement, and will often require multiple dedicated team members to operate it day to day.

Prepare for a lengthy time-to-value period and extensive training for your team. Salesforce is a series of apps that have been bolted on via acquisition, so expect integrations that have to be built and maintained, and slow page loads as processes run behind the scenes.

Out-of-pocket expenses for integrations and day-to-day maintenance can add up quickly for mid-sized businesses.

Insightly

Unlike legacy CRMs, Insightly is easy to set up, integrate, and adopt across teams. Designed for the needs of mid-sized businesses, Insightly is a unified CRM where marketing, sales, and customer service use the same data set to promote alignment and provide an elevated customer experience.

It's easy to connect Insightly with apps you use every day – without an outside integrator or firm. Insightly is highly customizable to fit your business.

With a simple, intuitive interface and a service team to guide you along the way, Insightly is easy to learn and adopt and provides quick time to value.

"Insightly is a great alternative to Salesforce. It has most of the same functionality at a fraction of the price. The interface is clean and easy to get the hang of. Insightly is definitely worth evaluating if your company is tired of paying large sums of money for Salesforce. Insightly's integrations capabilities and reporting functionality allows my team to stay organized, up to date and informed of all sales actions."

Will C.
Director of Sales, Industry: Internet

	salesforce	insightly BY UNBOUNCE
G2 Rating	★★★★☆	★★★★☆
TrustRadius Rating	★★★★☆	★★★★☆
General Rating (Per G2 in use, set-up, admin, etc.)	7.91	8.22
Pricing	$25 - $300 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner	(Separate App)	●
Workflow Automation	● (Enterprise)	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions	●	●
Configurable Profiles & Page Layouts		●
Integrations	●	●
Task and Event Management	● (Via API)	●
Free Trial	●	●
Marketing Automation	●	● (Additional fee)
Project Management		●
Service Management	●	● (Additional fee)
Mobile App	● (Additional fee)	●
Best Feature (Per TrustRadius)	Contact & Account Management	Contact & Account Management

Zoho vs. Insightly

Insightly wins for easy customizations

Zoho

Zoho is a cloud-based CRM. Rather than focus on mid-market companies, Zoho caters to the needs of businesses of all sizes.

Zoho has the key features of most CRMs even though out-of-the-box customizations are limited. Once you learn the interface, the tool is powerful. No direct support is available, so one person in your organization will likely need to become an expert quickly or you'll need an outside consultant.

Although the integration process is complex, once integrated, it is a good tool for cross- company communication.

Insightly

Insightly is a unified CRM for mid-sized businesses where marketing, sales, and customer service use the same data set to promote alignment and provide an elevated customer experience.

Insightly is highly customizable to fit your business. With a simple, intuitive interface and a service team to guide you along the way, Insightly is easy to learn and adopt and provides quick time to value.

You can easily connect Insightly with the other applications in use in your company using AppConnect to improve communication and collaboration across teams.

"Switch now. [Insightly] beats Zoho, Salesforce and Hubspot. Absolute ease of use. Simple to add contacts and companies and integrations. We stay in touch with prospects through every stage of the pipeline."

Brian G
Co-Founder, President, Industry: Marketing and Advertising

	ZOHO	insightly BY UNBOUNCE
G2 Rating	★★★★☆	★★★★☆
TrustRadius Rating	★★★★☆	★★★★☆
General Rating (Per G2 in use, set-up, admin, etc.)	7.91	8.22
Pricing	$0 - $52 Per user / per month	$29 - $99 Per user / per month
Contact & Account Management	●	●
Opportunity & Pipeline Management	●	●
Business Card Scanner	●	●
Workflow Automation	●	●
Dynamic Page Layout Rules		● (Enterprise)
Dashboard Views	●	●
Role-based Permissions	●	●
Configurable Profiles & Page Layouts	● (Enterprise & Ultimate only)	●
Integrations	●	●
Task and Event Management	●	●
Free Trial	●	● (Additional fee)
Marketing Automation	● (Additional fee)	●
Project Management	●	● (Additional fee)
Service Management		●
Mobile App		●
Best Feature (Per TrustRadius)	Role-based User Permissions	Customer Data Management / Contact Management

Quick reference chart

Here's a look at all of these vendors on one page for your convenience:

Vendor	Best feature (per G2 or TrustRadius)	Cost (per user / per month)
insightly BY UNBOUNCE	Contact & Account Management	$29 - $99
:copper	Contact & Account Management	$29 - $129
HubSpot	Email Marketing	$0 - $120
monday.com	Task & Event Management	$0 - $16
Nutshell	Contact & Account Management	$20 - $42
pipedrive	Opportunity & Pipeline Management	$12.50 - $99
salesforce	Contact & Account Management	$25 - $300
ZOHO	Role-based User Permissions	$0 - $52

About Insightly

Insightly elevates the customer experience by aligning sales, marketing, and service in one platform. Built to deliver key customer insights across all teams, Insightly's unified CRM helps organizations sell smarter, grow faster, and build lasting customer relationships. Insightly is trusted by more than a million users worldwide. For more information, visit insightly.com.

Request a demo →

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