

Right-sizing your CRM

Insights from go-to-market teams on how smarter CRM choices fuel sales efficiency and alignment.

Research conducted in partnership with Ascend2



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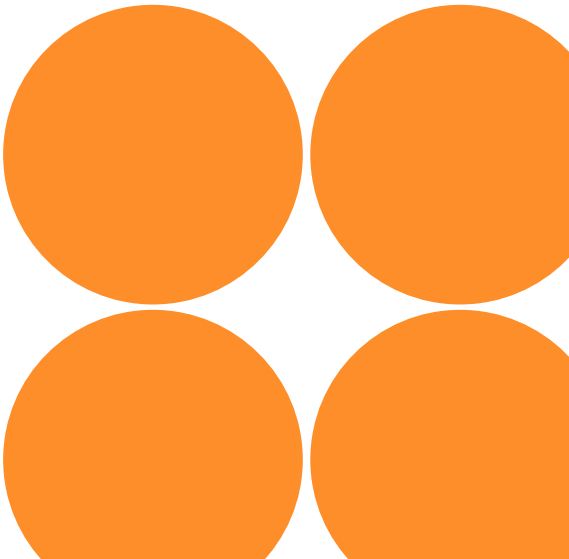
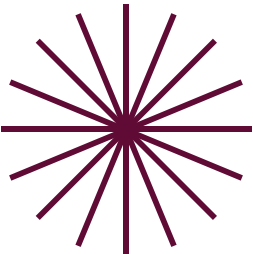
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Introduction

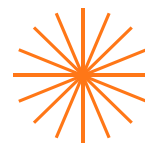
The right tools can supercharge alignment, streamline the buyer journey, and drive revenue growth. But too often, implementing more efficient and effective processes is blocked by flawed decision-making and a fragmented understanding of the challenges and needs of go-to-market (GTM) teams.

CRMs are foundational to how GTM teams manage customer relationships, collaborate across functions, and ultimately drive performance. Yet despite CRMs being essential to the technology ecosystems of most mid-market companies, many organizations struggle to leverage them effectively and maximize return on their investment. In fact, just 34% of teams say they fully embrace and effectively use their CRM, a surprisingly low number given how central these tools are to day-to-day operations.

Part of the problem lies in how these tools are chosen. Among primary purchase decision-makers, 40% say they focused on features over usability, while 38% admit to rushing the process rather than conducting a thorough evaluation. Nearly one-third prioritized cost or vendor reputation over selecting a solution that actually fits their team's needs. Ironically, cost is now the most common complaint among users, suggesting that the criteria used to make CRM decisions often conflicts with the realities of long-term adoption and satisfaction.

Adding to the challenge is a growing disconnect between executives and the teams they lead. While 55% of executives believe their CRM is being used effectively, only 27% of non-executives agree. This is just one area where leaders see CRM value from a strategic vantage point while regular users experience the frustration of inefficiencies and workflow bottlenecks.

To better understand how the use and adoption of CRMs impact sales efficiency and cross-functional alignment in 2025, Insightly CRM by Unbounce, in partnership with Ascend2, surveyed over 375 GTM professionals from mid-market companies. The findings reveal where teams are getting stuck, what decision-makers often miss, and where the greatest opportunities lie to turn your CRM into a true catalyst for growth.



Only one-third of GTM teams tap into the full potential of their CRM.

Which of the following was TRUE of your decision-making process for your CRM? (Primary purchase decision-makers)

We focused on features OVER usability

40%

We prioritized customization OVER out-of-the-box solutions

39%

We favored scalability OVER immediate needs

39%

We expedited our process OVER a thorough evaluation

38%

We prioritized cost OVER functionality

32%

We selected vendor reputation OVER direct fit

32%

Special segments and key findings

SPECIAL SEGMENTS

If you're looking for the top insights on these four key themes, keep an eye out for these special segment symbols throughout this report.



For a comprehensive evaluation of the sentiment of go-to-market (GTM) teams, we surveyed sales, marketing, and customer success professionals. A lot of the data that follows focuses on the perspectives that the sales professionals offered, but keep an eye out for the **GTM teams** symbol throughout the report for data from across all three departments.



One-quarter (25%) of the GTM organizations surveyed experienced significant revenue growth in the last year. Insights from this group give us an understanding of what **high growth companies** may be doing differently to improve sales performance.



In some areas, the contrast between **the executive perspective** and that of non-executives highlights blind spots in strategy execution and reveals where leadership assumptions may diverge from on-the-ground realities.



40% of GTM professionals surveyed report being highly satisfied with their current CRM. We zero in on the **CRM satisfaction** group to find out what sets them apart from those who are less satisfied with their current tools.





KEY FINDINGS

Sales efficiency and team alignment are the top revenue drivers for 2025. 53% of sales professionals say improving sales efficiency will have the biggest impact on revenue next year, followed closely by creating better alignment across sales, marketing, and customer success.

CRM satisfaction strongly correlates with growth and performance. Teams that are extremely satisfied with their CRM are over 5x more likely to report a very positive impact on sales efficiency and 4x more likely to report significant revenue growth.

Despite high satisfaction rates, adoption remains a major challenge. Only 34% of teams say they fully embrace and effectively use their CRM, and most users report using less than half of their tool's features.

When a CRM is the right fit, adoption skyrockets. Our research found that when a CRM is aligned with the size and needs of the organization, adoption improves. 86% of those with full adoption feel that their current CRM is the right size for their current team, compared to just 62% of those with less adoption.

Decision-making biases are holding teams back. While usability, integration, and flexibility top the list of priorities, 40% of decision-makers prioritized features over usability and 38% rushed the selection process—both of which contribute to low satisfaction and adoption.

Executives and non-executives see CRM impact differently. 55% of executives believe their organization's CRM is being used effectively, compared to just 27% of non-executives, revealing a clear perception gap between strategy and execution.

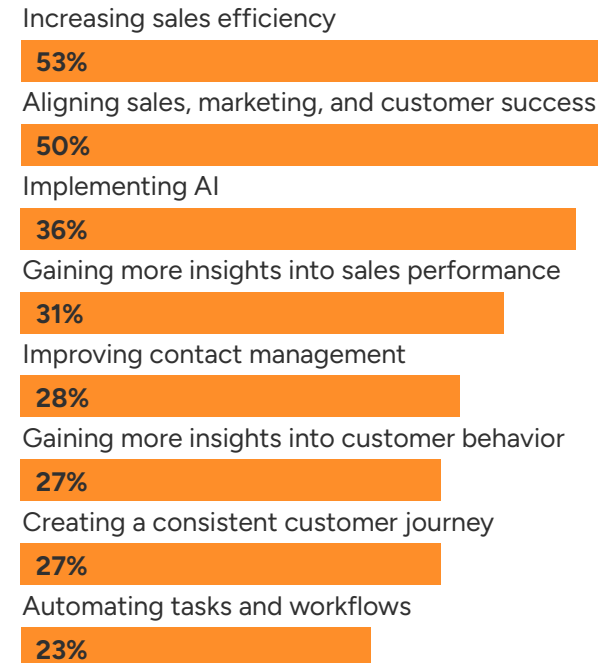
The biggest opportunities to maximize revenue in 2025

ALIGNING TEAMS AND DRIVING SALES EFFICIENCY WILL MAKE AN IMPACT.

Over half (53%) of sales professionals say increasing sales efficiency will have the biggest impact on revenue growth in the year ahead. Streamlining processes, reducing friction, and making the most of every customer interaction will be top-of-mind as teams work toward growth.

Close behind, half (50%) say that unifying sales, marketing, and customer success teams will make the biggest impact on revenue in the year ahead. This is a notable shift from our research [conducted in 2022](#) in which team alignment wasn't even recognized among the top five strategic priorities of go-to-market teams. Teams are recognizing that even the best tools and strategies fall flat without cross-functional collaboration.

Which of the following do you believe will make the biggest impact on revenue in 2025? (Sales)



Marketing teams are leaning on technology-driven strategies. 59% of marketers believe implementing AI into their processes will be a key driver of revenue growth in 2025, compared to just 37% of **customer success professionals** and 36% of **sales**. Marketers see AI not just as a tool for automation, but as a strategic lever for accelerating impact across the funnel.



Executives are significantly more likely than non-executives to feel that implementing AI (54% vs 38%) and gaining more insights into customer behaviors (44% vs 31%) will be catalysts for revenue growth in the coming year. Non-executives are focused on more immediate operational needs like increasing sales efficiency (46% vs 38%) and aligning adjacent teams (50% vs 43%). Executives may be overlooking the importance of foundational efficiency optimization while those closer to day-to-day execution recognize the need for streamlined processes and tighter collaboration.

Which of the following do you believe will make the biggest impact on revenue in 2025? (Job level)

	Executives	All non-execs
Implementing AI	54%	38%
Gaining more insights into customer behavior	44%	31%
Aligning sales, marketing, and customer success	43%	49%
Increasing sales efficiency	38%	46%
Creating a consistent customer journey	34%	32%
Improving contact management	31%	28%
Gaining more insights into sales performance	28%	32%
Automating tasks and workflows	22%	25%

GAIN VISIBILITY INTO THE CUSTOMER JOURNEY TO IMPROVE BUYER EXPERIENCE.

Despite being on the front lines of revenue generation efforts, sales teams in particular are lacking full visibility into the customer journey. Only about one-quarter (27%) of sales professionals say they have a clear, data-driven view that allows them to make effective decisions. When compared to marketing (46%) and customer success (30%) teams, the sales cohort is the least likely to report having this level of insight.

Enabling full visibility across the entire lifecycle has substantial benefits. Those with full visibility (33% of all teams surveyed) are significantly more likely to report delivering exceptional buyer experiences and significant revenue growth last year. This level of visibility is also tied to a stronger understanding of the customer, smoother alignment across teams, and ultimately, a more efficient path to conversion.

How much visibility does your team have into the customer journey to make informed decisions? (GTM teams)



THE MORE VISIBILITY INTO THE CUSTOMER JOURNEY...

... **the better the buyer experience.** 35% of those with full visibility into their customer journeys rate their buyer experience as exceptional, compared to just 13% of all others.

... **the more pronounced the revenue growth.** Teams with full visibility are over 3x more likely than others to report significant revenue increases in the last year (47% vs 15%).

... **the fewer operational roadblocks to sales efficiency.** Only 21% of teams with full visibility cite manual tasks and inefficient processes as a top challenge of improving sales efficiency, compared to 35% of those without full visibility.

... **the fewer alignment issues across go-to-market teams.** Just 24% of respondents with full visibility say misalignment between sales, marketing, and customer success is a challenge to sales efficiency, compared to 31% of those lacking a full view of the customer journey.

... **the more confident teams are in where to focus next.** Those without full visibility are more likely to say they need to increase sales efficiency (45% vs 41%) and align GTM teams (52% vs 38%) to drive revenue.

Driving growth through the right technology

MINIMIZE MANUAL WORK TO DRIVE SALES.

Sales teams are stretched thin, burdened by inefficiency, and struggling to coordinate across functions. Sales professionals report that their top challenges include too many manual tasks and inefficient processes, limited team capacity, as well as the misalignment between sales, marketing, and customer success. Nearly one third (29%) also say a lack of integration across tools and platforms is a challenge.

What are the biggest challenges associated with improving sales efficiency? (Sales)



Disconnected systems and technology that doesn't align with goals across all go-to-market functions can stunt sales efficiency and create major bottlenecks in workflows.



Sales, marketing, and customer success teams are largely aligned on challenges getting in the way of more efficient sales cycles. **Too many manual tasks and inefficient processes are two of the top three challenges across all three groups.** This shared pain point suggests that inefficiency is pervasive across functions.

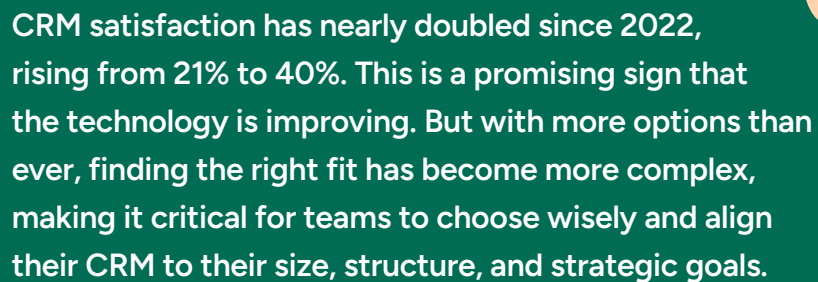
Leveraging the right technology to streamline workflows can not only make the entire GTM process more efficient, it could also reduce friction across the customer journey and ultimately drive business growth.



THE RIGHT CRM CAN ALIGN TEAMS AND IMPROVE OUTCOMES.

An overwhelming 97% of GTM professionals say their CRM has an impact on sales efficiency, however only about one-third (35%) say the impact is extremely positive suggesting a large portion of teams are using systems that may not fully meet their needs.

It's not just about having a CRM, it's about having the right CRM. Only 40% of sales, marketing, and customer success professionals say they're extremely satisfied with their current CRM. These teams that are most satisfied are significantly more likely to see positive impacts from their CRM on sales efficiency. They have better buyer experiences, see more revenue growth, and face fewer challenges to sales efficiency such as too many manual processes, lack of integration across platforms, and too many tools to manage.



CRM satisfaction has nearly doubled since 2022, rising from 21% to 40%. This is a promising sign that the technology is improving. But with more options than ever, finding the right fit has become more complex, making it critical for teams to choose wisely and align their CRM to their size, structure, and strategic goals.

IT PAYS TO HAVE THE RIGHT CRM...

... to boost sales efficiency. Those who are extremely satisfied with their CRM are over 5x more likely than those who aren't as satisfied to report an extremely positive impact on sales efficiency (68% vs 13%).

... to elevate the buyer experience. 34% of highly satisfied CRM users say their buyer experience is exceptional, compared to just 11% of others.

... to drive revenue growth. 47% of those extremely satisfied with their CRM report significant revenue increases in the last year, over 4x more than their less satisfied peers (11%).

... to gain full customer journey visibility. 53% of highly satisfied CRM users say they have full, data-driven visibility into the customer journey, compared to just 19% of others.

... to reduce friction and inefficiencies. Highly satisfied CRM users are significantly less likely to report challenges tied to clunky or ill-fitting CRMs such as too many manual tasks and inefficient processes, integration of tools across teams, and tool sprawl.

COMBAT TOP CHALLENGES WITH AI-POWERED CRMS.

Sales professionals are eager to see AI play a bigger role in solving the everyday challenges they face in their CRM systems, especially those tied to manual work and limited team capacity, which are also the most commonly reported barriers to improving sales efficiency. Sales teams say they would use AI to augment task and workflow automation, create reports, and suggest next-best actions in their process. Additionally, 30% of our sales cohort reports wanting AI to help organize contacts and leads.

AI can be applied not just to save time, but to enhance the precision and impact of customer engagement. As pressure to increase efficiency without expanding headcount grows, AI-enabled CRMs are emerging as a crucial opportunity to amplify team capacity and streamline workflows.

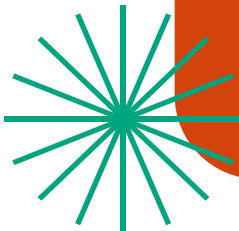
What challenges would you want AI to help with in your CRM? (Sales)



GET STARTED WITH AI-POWERED EMAIL REPLIES AND SUMMARIES IN INSIGHTLY CRM.

Quickly generate personalized, professional replies or summarize past communications so you can spend more time selling and less time typing.

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Evaluating your current CRM: Is it really right for your needs?

PERCEPTIONS OF CRM SUITABILITY.

28% of sales professionals surveyed report that their CRM is not suitable to their team size indicating that they could easily down-size, or that they are outgrowing their current tool. Another 19% report that their CRM is not suited for their organization's stage of growth. While 60% of sales teams feel they are working with a "right-sized" CRM, we see significant issues with adoption, usability, and overall satisfaction that could suggest otherwise.

CRM features are being vastly underutilized. Despite a largely positive perception of CRM suitability, a whopping 94% of sales professionals report using less than three-quarters of their CRM's features. Two-thirds report using less than half of their CRM's features with another 27% who say they use between 50% and 75%.

What portion of total CRM features do you estimate you use within your existing CRM? (Sales)

Less than 25%

12%

26% - 50%

55%

51% - 75%

27%

More than 75%

6%



Executives feel more positively about the size of their CRM in comparison to non-executives with 86% reporting they are using the right size CRM today compared to 65% of non-execs. While executives may have visibility into the strategic value a CRM provides, non-executives experience more day-to-day friction that an ill-fitting CRM can create.

Most sales users are only relying on a fraction of their CRM's features. 60% of sales professionals report that less than half of their CRM's features are critical to their daily workflow. This is an opportunity for businesses to find a CRM with better onboarding, functionality, and usability to improve adoption and sales efficiency.

How many of your CRM's features are critical to your daily workflow? (Sales)

Less than 25%	16%
26% - 50%	44%
51% - 75%	34%
More than 75%	6%



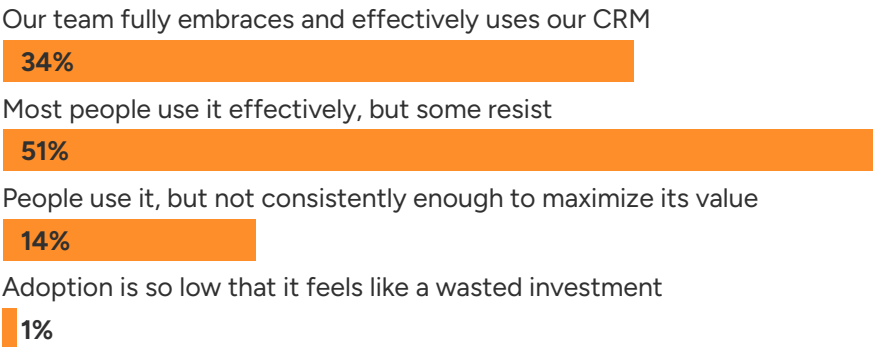
Those who are highly satisfied with their CRM are more likely than others

to have it deeply integrated into their daily workflows. 54% of those who are highly satisfied with their current CRM consider more than half of its features critical to their daily workflows compared to just 34% of others. This indicates that effective adoption and utilization drives satisfaction.

CRMS ARE WIDELY IMPLEMENTED, BUT NOT UNIFORMLY EMBRACED.

Only about one third of professionals say their team fully embraces and effectively uses their CRM. The majority (51%) report that while most team members use it well, there are still pockets of resistance. Another 14% say usage is inconsistent, preventing the tool from delivering its full value.

Which statement best describes CRM adoption at your company? (GTM teams)



CRM adoption is critical to driving sales efficiency. Those with full adoption are 2x more likely than others to report that their CRM has extremely positive impacts on sales efficiency (59% vs 23%). This could be due, in part, to the increased visibility into the customer journey that CRM adoption enables. Teams that embrace and effectively use their CRM are also more likely to have full visibility across the customer journey (49% vs 24%).

So how can organizations ensure maximum CRM adoption? “Right-sizing” their CRM is a good place to start. According to our research, a CRM that is aligned with the size and needs of the organization is strongly correlated with adoption. 86% of those with full adoption feel that their current CRM is the right size for their current team, compared to just 62% of those with less adoption.



While 55% of executives believe their teams are fully embracing and effectively using the CRM, only 27% of non-executives agree. For executives aiming to maximize ROI, it’s critical to listen closely to frontline teams who may be struggling with adoption and missing out on the CRM’s full potential.

While CRM platforms are traditionally built with sales in mind, functionality of these solutions can go well beyond the sales department. 72% of GTM teams surveyed report marketing as a CRM user and 64% say the same for their customer success team. The use of these platforms is becoming increasingly more widespread across departments and functions with nearly half of operations teams also leveraging their organization’s CRM.

Which teams are currently using your CRM? (GTM teams)

Sales	82%
Marketing	72%
Customer success	64%
Operations	49%
Other	1%

Boost CRM adoption across your entire go-to-market team with Insightly. By using one unified platform for CRM, marketing automation, and support/ticketing, your team can collaborate more efficiently and drive better results.

EXPLORE DEMOS ON-DEMAND

WHERE CRMS FALL SHORT FOR USERS.

Cost is the most common complaint among sales professionals when it comes to their CRM, and by a wide margin. Nearly one in five (21%) cite high initial or ongoing costs as their top frustration, signaling that many feel that what they are spending exceeds the value they are getting. Others report a lack of scalability, poor cross-team support, too much manual work, and tool complexity as top complaints. CRMs should not only be cost-effective, but also intuitive, flexible, and built to serve multiple teams seamlessly.

What is your biggest complaint about your current CRM solution? (Sales)



Frustrations with CRM solutions vary by role, but all users want to feel like they are getting value from their investment. Users across all GTM teams want a solution that is easy to implement and scale, that connects easily with their existing tech stack, automates repetitive tasks, and supports collaboration across functions.



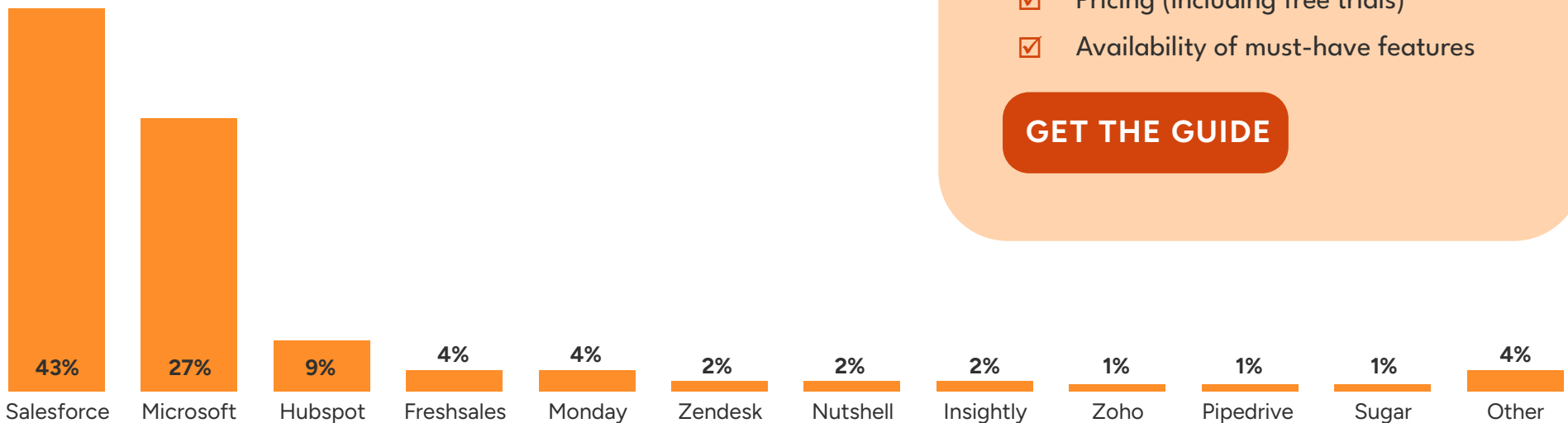
GTM teams aren't getting enough value out of their CRM. Less than one-third (29%) of those surveyed report high levels of satisfaction with what they are currently paying for their CRM. 47% are moderately satisfied and 20% report being dissatisfied.

Evaluating your decision-making process: Keeping biases in check.

MOST MID-MARKET TEAMS ARE USING BIG-NAME TOOLS.

Overall, Salesforce and Microsoft dominate the market for CRM use. Companies often default to these well-known, enterprise-level tools. Larger companies with more than 100 employees are even more likely to be using these two solutions (46% and 29%, respectively). Even among smaller mid-market firms with 50–100 employees, adoption of these enterprise-grade tools remains high, with 39% using Salesforce and 26% using Microsoft. These choices often reflect familiarity and brand recognition, but they may be more robust than needed or lack strategic fit.

Which CRM are you currently using? (GTM teams)



GUIDE: CHOOSE THE RIGHT CRM FOR MID-SIZED COMPANIES.

Choosing a CRM is a big decision—you need the right fit for your team, your goals, and your budget. But who has time to compare every option?

We've done the research for you. Our CRM comparison guide breaks down:

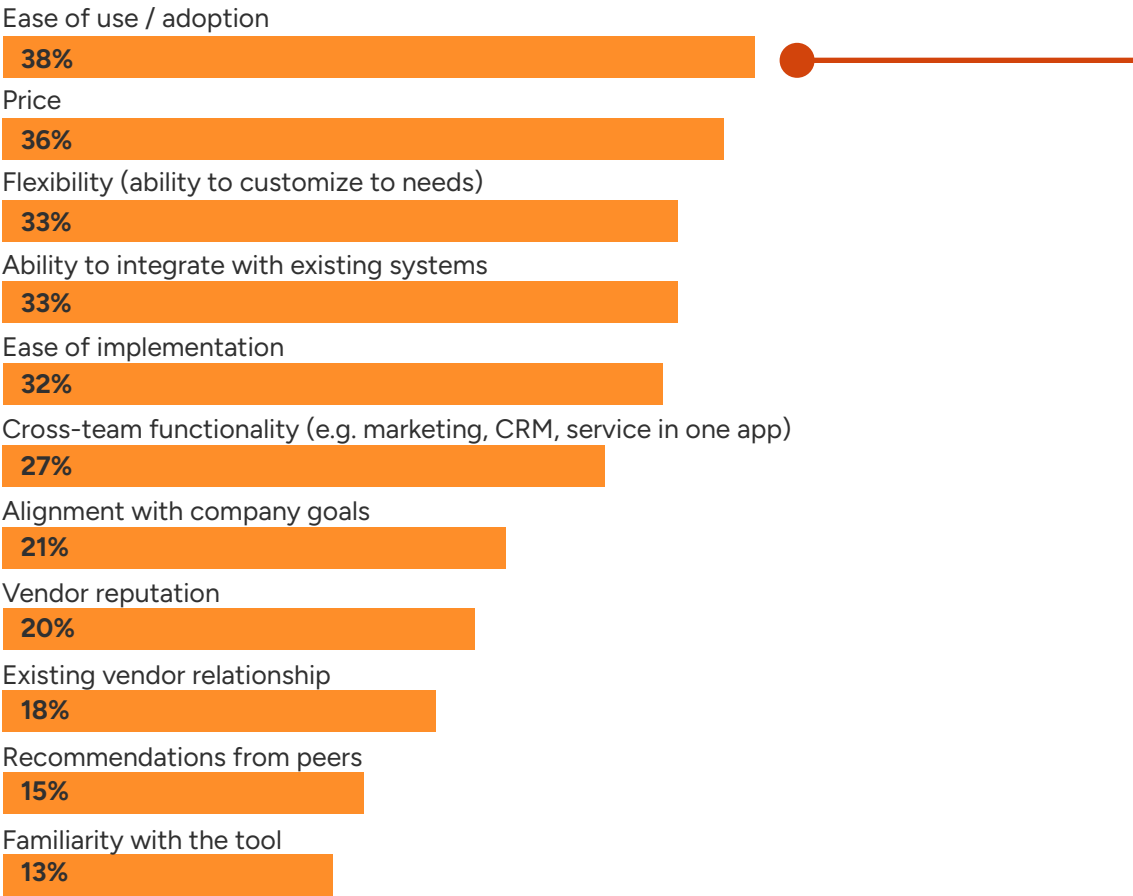
- ✓ Pros and cons of 8 vendors
- ✓ Ratings from trusted sources like G2
- ✓ Pricing (including free trials)
- ✓ Availability of must-have features

[GET THE GUIDE](#)

SALES PRIORITIZES FIT OVER FAMILIARITY.

When selecting a CRM, user-friendly tools are critical according to sales professionals surveyed. This top priority is followed closely by factors like price, flexibility, and integration capabilities. Ease of implementation also ranks among the top five. The importance of finding a CRM that is intuitive, customizable, and works seamlessly with the systems that users already rely on cannot be overstated.

What factors are/would be most influential in choosing a CRM? (Sales)



Organizations recognize the importance of usability, with ease of use and adoption being reported as the top priority in choosing a CRM. However, this is also one of the biggest challenges in practice with only about one-third of teams reporting full adoption of their CRM, and many users still struggling to use their tool consistently or to its full potential.

LEANING ON WHAT YOU KNOW MAY NOT GET YOU WHAT YOU NEED.

Our research uncovered that the factors that align with the needs of the organization are often overlooked throughout the decision-making process in lieu of familiarity with a tool or its recognition in the market. Among the 58% of the sales, marketing, and customer service professionals surveyed who have played a primary role in purchasing a CRM, nearly all ranked practical factors like ease of use, price, and flexibility at the top of their wish list for future tools. Yet **when asked what actually drove their most recent CRM decision, the most common responses were that their team had used it before (26%), it was a well-known brand (25%), or they had personal experience with it (21%).**

This gap between stated priorities and real-world behavior signals that **comfort and recognition often outweigh function and value** in high-stakes tech decisions. Even among experienced buyers, the pull of brand familiarity and internal precedent can override efforts to prioritize alignment with team needs.

Ultimately, what was the driving factor behind your decision to choose the CRM you did? (Primary purchase decision-makers)

The majority of your team has used it before

26%

It's a well known brand

25%

You've used it before

21%

It's the best one on the market

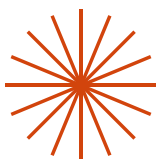
11%

It is most closely aligned with your team's needs

11%

It's the right price

5%



Executives are 2x more likely than non-executives to have chosen a CRM because they have used it before (26% vs 13%). This familiarity is reinforcing a never-ending bias loop that results in the dominance of tools like Salesforce. When decision-makers stick with what they know, it becomes harder for newer, more tailored solutions to break through, even when they offer better value or functionality.



84% of all go-to-market professionals surveyed have used more than one CRM in their career. Nearly two-thirds (64%) report having used two or three different solutions while another 22% have used four or more.

MAKING THE SWITCH DOESN'T HAVE TO BE A STRUGGLE.

According to 58% of all CRM purchase decision-makers surveyed, the high costs associated with switching and implementing a new CRM is getting in the way of a change in solutions. Over one-third say they can't find the right fit for their needs and/or their existing contracts lock them in with their current vendor. This aligns with the fact that price ranked among the top three most important factors when choosing a CRM, highlighting the growing need for platforms to demonstrate value, in both long-term affordability and overall fit.

What would most prevent you from switching CRM solutions? (Primary purchase decision-makers)

Cost of switching / implementation is too high

54%

Existing contracts or vendor lock-in

38%

Can't find the right fit for our needs

37%

Don't want to disrupt the team with training

33%

Don't have the time to make the switch

32%

Lack of buy-in from leadership

27%

Other

3%



84% of GTM professionals report that investments sunk into their current CRM are playing a role in why they choose to stick with it. 40% say they've invested too much to change and 40% say while this is somewhat true, they are still evaluating other options. Only 16% say they actively evaluate the effectiveness of their CRM without letting previous investments hold them back.

While loyalty to past investments is understandable, **it's important not to let sunk costs stand in the way of finding a solution that better fits your team's needs and unlocks greater long-term value.**

MAKE THE MOVE TO A BETTER-ALIGNED CRM WITH THESE BEST PRACTICES IN MIND:

- **Build a clear business case.** Focus on how a new CRM will accelerate team productivity and help drive measurable growth over time.
- **Understand how your teams will actually use it.** Ensure there are people outside the buying committee weighing in, especially those that rely heavily on CRM for their processes. Mapping workflows across departments can help determine your must-have features and integrations.
- **Challenge your biases.** Decision-makers are often drawn to platforms they've used before, but familiarity doesn't guarantee the best fit. Be open to exploring solutions that truly align with your team's actual needs.
- **Consider long-term needs vs. short-term priorities.** A CRM that checks today's boxes might not scale tomorrow. Look for a solution that's easy to customize and grow with.
- **Get early buy-in from your team.** Choose a solution that's intuitive and easy to adopt, so users see value fast, and without a steep learning curve.

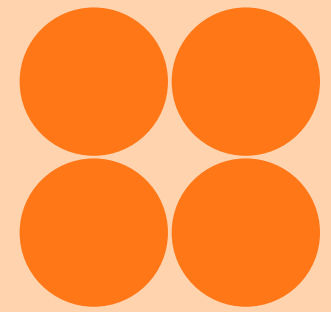
Conclusion

Choosing the right CRM is a strategic decision that can make or break an organization. The right technology can improve visibility into the customer journey, align go-to-market teams, and improve the buyer experience, increasing sales efficiency and fueling revenue growth.

However, the process of determining the right CRM and ensuring adoption across teams can present major hurdles. While many teams recognize the importance of factors like ease of use, seamless implementation, automation, integrations, and visibility across the customer journey, purchase decision-makers end up defaulting to familiar solutions or remain tied to past investments when it comes time to make the final call. This can lead to low adoption, inefficiency across functions, and continue the cycle of stunted growth.

To get the biggest bang for your buck, purchase-decision makers need to choose a CRM based on the value it can provide for the teams that use it. For organizations looking to grow efficiently and scale effectively, now is the time to reevaluate whether your CRM is helping you move forward... or holding you back.





READY TO TAKE ACTION? START WITH THESE INSIGHTS IN MIND:

Don't underestimate the impact of usability on CRM adoption and ROI.

Usability plays a critical role in CRM success, yet 40% of decision-makers prioritize features over usability, which often leads to low satisfaction and adoption. Clunky or ill-fitting CRMs lead to manual tasks, poor integration, and tool sprawl. In contrast, highly satisfied CRM users report fewer challenges and more streamlined processes.

Take action: When evaluating CRM solutions, prioritize usability to ensure smoother adoption, better team integration, and higher ROI.

Leverage AI to streamline sales processes and boost revenue.

Sales efficiency is a top priority, with 53% of sales professionals citing it as the key driver of revenue growth next year. Many struggle with manual tasks and processes that slow them down. AI-powered tools, like Insightly CRM's AI-driven email responses and summaries, can automate routine tasks and free up time for high-value activities.

Take action: Implement AI features in your CRM to automate repetitive tasks such as email replies, allowing your sales team to focus on strategic selling.

Check biases when selecting a CRM for your business.

Many executives fall into the trap of sticking with familiar CRM solutions, even if they don't fit their business's needs. Nearly one-third (31%) of executives selected their latest CRM based on vendor reputation over direct fit. Interestingly, 86% of executives feel their CRM is the right size for their business, compared to only 65% of non-executives. This bias often leads companies to choose overly complex, enterprise-level tools when a simpler solution might be more effective.

Take action: Take a step back and reassess your CRM needs. Evaluate solutions based on business size, scalability, and real user feedback, rather than familiarity.

STOP OVER-INVESTING IN COMPLEX CRM'S THAT AREN'T RIGHT-SIZED FOR YOUR BUSINESS.

Insightly's AI-powered CRM is full-featured, affordable, and customizable—designed to meet your needs at every stage of growth.

[REQUEST A DEMO](#)

[TRY FOR FREE](#)

Participants and methodology

PARTICIPANTS

N = 379 B2B Professionals

Job level		Number of employees	
Executive/C-Level	26%	50 - 100 employees	47%
VP/Director	26%	101 - 500 employees	53%
Manager/Strategist	44%	Team size	
Specialist/Coordinator	4%	1-10 employees	19%
Primary area of focus		11-25 employees	36%
Marketing	27%	26-50 employees	26%
Sales	40%	51-100 employees	15%
Customer success/service	33%	101+ employees	4%

METHODOLOGY

This research was conducted by Ascend2 in partnership with Insightly by Unbounce to benchmark business strategies, as well as the tactics and technologies that support them. A custom online survey was fielded in February and March 2025, gathering responses from 379 B2B professionals in the United States. All participants self-identified as users of a customer relationship management (CRM) system and represented roles in sales, marketing, or customer success. Respondents were employed at organizations with 50 to 500 employees, spanning a range of industries.





About the research partners



Insightly by Unbounce is a modern, affordable CRM that teams love. It's designed to elevate the customer experience by aligning sales, marketing, and service in one place. Easy to use, simple to customize, and built to scale, it solves the everyday pain points that legacy CRMs often overlook. With powerful insights shared across all teams, Insightly CRM helps organizations sell smarter, grow faster, and build stronger customer relationships. Today, it's trusted by over a million users worldwide. Learn more at insightly.com



Ascend2 partners with leading companies to deliver original research that drives marketing success. From survey design and data collection to content creation and media outreach, Ascend2 provides end-to-end support that helps brands create impactful thought leadership. Their research is used to fuel marketing content, generate high-quality leads, and engage prospects through the middle of the funnel. Learn more at ascend2.com.

