

2024

# CRM Comparison Guide

For Mid-Sized Businesses



8 Vendor Comparison Guide























# 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 modern 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. It will help you decipher between modern CRMs and legacy software that will bog you down. Happy researching!

## Contents

-  vs  ..... Go to section 
-  vs  ..... Go to section 
-  vs  ..... Go to section 
-  vs  ..... Go to section 
-  vs  ..... Go to section 
-  vs  ..... Go to section 
-  vs  ..... Go to section 
- Quick Reference Chart ..... Go to section 

*"The number one biggest benefit of working with Insightly has to be the transparency that it allows everybody in our team, in our company to see what's going on and to see what everybody is doing."*

**Kelsey Dus**  
SIGMA Group

# :copper vs insightly

## Edge to Insightly for integrations

:copper	insightly
<p>Copper is a CRM with useful features for small businesses. It scores well on the essential functions of a CRM.</p> <p>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. Since there is no free option with Copper, prepare to commit to the lowest pricing level to use it beyond the 2-week trial.</p> <p>If you need more than three seats, you'll be pushed into a higher tier of pricing.</p>	<p>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.</p> <p>Insightly has a free option for up to 2 users to help small businesses and start-ups. Insightly is easy to learn and adopt and provides quick time to value.</p>

*“Insightly helps us go faster, drives efficiency, and gives more time back to our teams so they can be even more productive. At the end of the day, we have more control over our workflows and we’re able to align Insightly to our business requirements, not the other way around.”*

**Kevin Corne**  
COO  
Sullivan & Stanley

	Copper	Insightly
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$29 - \$134 Per user/per month	\$0 - \$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)	Security	Customer Data Management/ Contact Management

# 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 is a modern CRM that is scalable to grow infinitely with your business. It's an open system that is easy to integrate with all of the tools you already use. You can use native integrations or choose Insightly AppConnect, a no-code/low-code integration tool that's part of the platform. 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
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$0 - \$150 Per user/per month	\$0 - \$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 Management



## Insightly is a true CRM and a PM tool

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 is built to be a CRM, not a PM tool that has been retrofitted to be a CRM. As a modern CRM, Insightly is scalable, affordable and easy to use. It will quickly become the single source of truth for your business.

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 across your teams.

*"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	Insightly
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$0 - \$28 Per user/per month	\$0 - \$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)	Task & Event Management	Contact & Account Management



# Nutshell 🍪 vs

## 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 is a modern, scalable and affordable CRM. It's free for up to 2 users, so small businesses and start-ups can get off the ground with a powerful tool, but larger companies are happy with its ability to scale and be customized to their needs.

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.

*"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
G2 Rating	★★★★☆	★★★★☆
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$19 - \$79 Per user/per month	\$0 - \$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™	insightly
<p>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.</p> <p>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.</p> <p>There is no free option with Pipedrive, so you'll need to commit to the lowest pricing level to use it beyond the 2-week trial.</p>	<p>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.</p> <p>It's free for up to two users, so small businesses and start-ups can give it a try. Insightly AppConnect is a no-code/low-code integration tool to easily connect your CRM with the other applications in use in your company.</p>



*"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
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$21.90 - \$119 Per user/per month	\$0 - \$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)
Project Management		●
Service Management		● (Additional Fee)
Mobile App	Business Card Scanner Only	●
Best Feature (Per TrustRadius)	Opportunity & Pipeline Management	Customer Data Management/ Contact Management



## Drastically lower total cost of ownership with Insightly

	
<p>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.</p> <p>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.</p> <p>Out-of-pocket expenses for integrations and day-to-day maintenance can add up quickly for mid-sized businesses.</p>	<p>Unlike legacy CRMs, Insightly is a modern, affordable, scalable CRM that was born in the cloud. It's easy to set up, customize, and adopt across teams using in-house resources vs. pricey consultants.</p> <p>It's easy to connect Insightly with apps you use every day – without an outside integrator or firm - using AppConnect, a low-code/no-code drag-and-drop integration tool.</p> <p>Insightly is affordable and offers a much lower total cost of ownership vs. legacy CRMs like Salesforce. With a simple, intuitive interface and a service team to guide you along the way, Insightly is easy to learn and provides quick time to value.</p>

*“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

(Source: G2)

	Salesforce	Insightly
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$25 - \$500 Per user/per month	\$0 - \$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	● (Via API)	●
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 G2)	Contact & Account Management	Contact & Account Management



## Insightly wins for easy customizations



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.



Unlike legacy CRMs, Insightly is a modern, scalable CRM that's easy to set up, integrate, and adopt across teams. Designed for growing businesses, Insightly is a powerful, feature-rich CRM with a low total cost of ownership.

It's easy to customize Insightly to the needs of your business. You can also integrate Insightly with the applications you use across your business using either a native integration or AppConnect, Insightly's low-code/no-code integration tool.

Insightly is backed by a sizable team of support professionals to help as needed along the way.

*"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

(Source: G2)



back to  
contents



	Zoho	Insightly
G2 Rating	★★★★☆	★★★★☆
TrustRadius Rating	★★★★☆	★★★★☆
Pricing	\$0 - \$65 Per user/per month	\$0 - \$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 Per User	● (Enterprise & Ultimate Only)	●
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)	Security	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
	Contact & Account Management	\$0 - \$99 Per user/per month
	Security	\$29 - \$134 Per user/per month
	Email Marketing	\$0 - \$150 Per user/per month
	Task & Event Management	\$0 - \$28 Per user/per month
	Contact & Account Management	\$19 - \$79 Per user/per month
	Opportunity & Pipeline Management	\$12.90 - \$119 Per user/per month
	Contact & Account Management	\$25 - \$500 Per user/per month
	Security	\$0 - \$65 Per user/per month



# About Insightly

Insightly is the modern, affordable CRM that teams love. It's easy to use, simple to customize, and scales with companies as they grow, solving common pain points that legacy CRMs can't. Powerful in any vertical, Insightly CRM customers can add companion products for marketing automation, customer service, and integrations in the same platform. Insightly is trusted by more than a million users worldwide. For more information, visit [insightly.com](https://insightly.com).



## Insightly CRM

Centralize your customer data and close more deals



## Insightly Marketing

Create engaging customer journeys and grow pipeline with the power of marketing automation.



## Insightly Service

Elevate your support and exceed customer expectations with a full-function customer service ticketing application.



## AppConnect

Stay connected to the apps you already use with a no-code/low-code integration platform.

See Insightly in action.

REQUEST A DEMO

START A FREE TRIAL



The modern, affordable CRM teams love.