



insightly
BY UNBOUNCE

ROI Study

Insightly CRM | 2026

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What is the CRM Sweet Spot for Mid-Market Growth?



Most companies know they need a CRM. It is table stakes for managing pipeline and creating visibility. The real decision is not whether to get one, but which one fits your stage. Many mid-market teams (and even small businesses) jump to the largest CRM brands because they look impressive. That choice often backfires. You end up paying for complexity you do not need and features your team will not use.

Before you pick a system, assess what your company actually needs and what it can support. A CRM should make work easier, not heavier. Mid-market teams sit in a tough spot. They are too big for starter DIY tools and not big enough for enterprise platforms that assume you have a full-time RevOps function ready to configure and maintain them.

This is where right-sized CRMs make a real difference. You want a system that delivers strong pipeline management, reliable reporting, and useful automation without forcing you into long implementation cycles. You want a tool your reps can learn quickly, your managers can coach from, and your leaders can use to see where revenue is coming from. If the system is too light, you cannot scale. If it is too heavy, your team ignores it, and you lose visibility entirely.

You need a CRM designed for the size, complexity, and staffing realities of your business today. Right-sized systems drive adoption, improve data quality, and support the growth you want without overwhelming your team.

About Insightly CRM

Insightly CRM stands out because it gives growing companies balance. Our review shows that it delivers strong pipeline management, useful reporting, and reliable automation without adding unnecessary complexity. The interface remains intuitive for teams without a dedicated ops function, helping keep adoption high and data consistent.

It also fits the pace of a growing company. You get clear forecasting, cleaner handoffs, and simple workflows that support good habits. You can build the automation you want, but you avoid the heavy configuration work that slows teams inside enterprise systems.

Insightly CRM gives mid-market companies structure they can trust and flexibility they can manage.

● Customer Use Cases



In reviewing feedback from hundreds of customers, we have determined that Insightly CRM meets the following needs:

Use Case	When to Prioritize this Tech for Your GTM Motion
Manage your sales pipeline	Insightly CRM help sales teams more efficiently manage their lead and opportunity pipelines, improving lead qualification and routing, deal visibility, deal velocity, and accurate forecasting.
Automate workflows & project delivery	Automation decreases errors, eliminates paperwork, and keeps teams focused on selling. Insightly CRM's built-in project management helps teams deliver on time and keeps the tech stack manageable.
Molds to your business	Insightly CRM lets you customize fields, objects and workflows to the way your business runs. Removing the need for IT & admins lowers the total cost of ownership and speeds up user adoption and time-to-value.
AI built in	Insightly CRM's AI copilot speeds time to value by making it easier and faster to use. Copilot helps you surface AI-driven insights, streamline workflows, and automate tasks to expedite your business.

Customers tell us that Insightly CRM:

- Is easier to use than other CRMs
- Is the best CRM for project delivery
- Makes the reporting process simple
- Easily connects with your business tech stack
- Enables better customer relationships and improves productivity

QUOTABLES

"Everything you need in a CRM is all here"

"Perfect for mid-market"

"Insightly CRM revolutionized how we manage clients & streamlined our process"

"Helped us reduce time, save errors, and scale."

"Much lighter to use than competitors but still packed with features"

"As a CRM expert who helps clients implement CRM systems, Insightly is my go-to"

"Eliminated an enormous amount of manual data tracking"

"So easy a beginner can use, yet the software has features even a data nerd appreciates"

"Makes it easier for us to deliver great customer experiences in a way other CRMs just can't"



Insightly CRM's ROI insightly BY UNBOUNCE

Compared to market leaders, customers tell us that Insightly CRM offers friendly contract terms, faster go-live, and quicker payback.

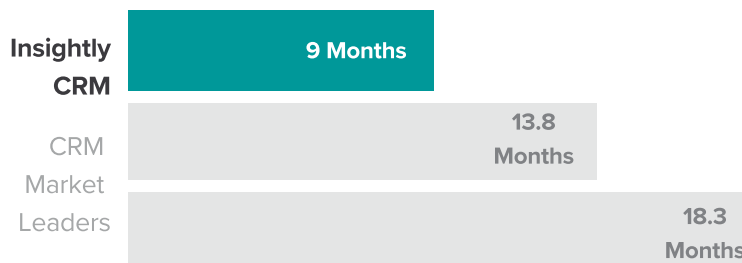
Lower Perceived Price



Faster Go Live Time



Time to ROI



Revenue Outcomes with Insightly CRM

Insightly CRM customers report improved growth rates compared to previous CRMs

242%

Growth in Revenue
Sport Court LV

360%

Growth of installations in 3 months
Better Earth Solar

6,000

New customers onboarded using project pipelines
We Got POP

2x

Pipeline and conversion
Barrier Compliance

40%

Improvement in lead tracking and follow-up
ProcessWorx

85%

Reduction in errors
The Village Goldsmith



● About GTM Partners' ROI Studies

GTM Partners' ROI studies are third-party validated assessments of Go-to-Market vendor solutions that are primarily focused on how to get the most out of an investment in technology. Centered around use cases (as opposed to stack ranking vendors), these guides are intended to provide readers with a data-driven analysis of what problems the solution is intended to solve and how well it delivers on those promises.

ROI Studies are developed in three stages:

- First, we will work with the vendor to learn about their capabilities. The vendor must respond to a use-case-driven market survey, provide a demo and give us insight into their roadmap.
- Next, we analyze third-party data to understand how the market at large is using the solution and what they find to be most valuable. We also review feedback on the entire segment to understand how that vendor performs against its competitors or similar solutions in the use cases specified.
- Finally, we speak with customers to better understand their primary use cases, get an understanding of any additional investment outside of the cost of the solution and confirm any need for additional investment in companion solutions required for the use cases to be performed.

GTM Perspectives are developed at the request of the vendor, who provide us access to their customers and support our understanding of the solution we are validating.

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