



Workflow Comparison

	Wealthbox Premier	Process Street	Hubly
Monthly Cost	+\$30 per user per month compared to Basic plan; includes cost of WB Mail	\$25 per user per month for Standard Plan	\$99 per user per month; 2 free months with Sphynx discount
Layout Type	List-Based	List-Based	Board-Based
Contact Record Sync	Native	Via Zapier	Native
File Attachment	Download Only	Upload / Download	Upload / Download
Comments	Yes	Yes	Yes
Conditional Logic	Advance to next task (still shows skipped tasks)	Show / hide tasks, show / hide fields within tasks	Start next workflow(s)
Dynamic Due Dates	No	Yes	No
Require Approval to Advance to Next Step	No	Yes	No
Add Custom Tasks to In-Process Workflows	Yes	No	Yes
Mobile Application	Yes	Yes	No
Share Templates With Team / Organization	Yes	Yes	Yes
Share Templates With Guests	No	Yes	No
Task Description	Plain Text Only	Rich Text and Form Fields	Rich Text Only
Completion Time Estimate	No	No	Yes
Assign Team Member	Static Assignment	Static or Role-Based Assignment	Static Assignment
Emailed Daily Digest	No	Yes	No
Template Library	Yes	Yes	Yes

CRM Comparison

Zapier Integration	Start New Workflow	Start New Workflow, Update Existing Workflow	Start New Workflow
Best Feature	Simplicity and ability not to have to add additional software for current Wealthbox users.	Most comprehensive conditional logic settings and workflow template library.	A more robust version of Wealthbox's workflow feature. Ability to drag client cards between workflow stages.
Worst Drawback	Task descriptions are limited to plain text and don't allow you to include contact data or form fields.	Inability to easily add one-off tasks to in process workflows.	Visual complexity and cost.

Outcome:

For current Wealthbox users who prefer an all-in-one system, using Wealthbox's built-in workflows will definitely get the job done, especially on the Pro or Premier Plans, which include the Outcomes feature.

Wealthbox or Redtail users who prefer a board-based system and want 2-way synchronization between their contacts in their workflow software and their CRM will benefit from using Hubly.

Users who prefer the most robust workflows possible, or prefer to use their workflow software as their home base will find Process Street to be both feature-rich and user-friendly.