Comparing CRMs

As of 07/07/23

Below are a few of the most popular CRM platforms you can evaluate on behalf of your client. For current partnership information, see *Partners > Productivity Partners* on the SX Portal.

Best Use Case for Each CRM system

claritysoft

Best for:
- Customer relationship focused best for small and mid-sized companies with account complexity.
- Flexible and ease of customization and works well for any industry.

Capterra write up:
Claritysoft CRM's unique blend of simplicity, utility, and flexibility delivers powerful marketing automation, sales automation, customer service tools and much more in an intuitive, completely customizable interface. Claritysoft was designed with considerable focus on usability, and built to enhance the user experience and maximize user adoption. Claritysoft CRM gives you enterprise power and functionality at a fraction of the cost.

salesforce

Best for:
- Essentials basic license for small business. Best for companies looking to scale quickly.
- Ability to move through licenses as business grows and customize.

Capterra write up:
From initial bidding to project management, Sales Cloud empowers construction businesses to easily manage relationships with prospects, clients, suppliers, and partners. Win more bids and minimize change requests with a customizable CRM platform that allows you to reduce busy work, continually optimize project schedule and budget, and make decisions based on real-time data. We do not have a partnership with Salesforce, but Kihbba can help with implementation if needed.

pipedrive

Best for:
- Companies seeking pipeline management and activity-based selling methodology.

Capterra write up:
Closing deals has never been easier thanks to Pipedrive's powerful yet agile CRM software. Keep everyone in your team focused on the activities that drive clients to purchase. Pipedrive is known for its versatility, intuitive design, and robust mobile CRM that keeps you updated on deals and activities.

HubSpot

Best for:
- A preferred choice solution for heavy marketing focus companies, website lead creation, and lead tracking.
- Focuses on marketing efforts – attract, engage and delight customers.

Capterra write up:
HubSpot's free CRM is built for companies with 10-1,000 employees that want to spend less time logging data. It keeps your contacts in one centralized, customizable database. It helps you manage your pipeline so you can keep deals moving forward. And you can see everything about a lead in one place - no more digging through inboxes to find information. It's easy to set up and intuitive to use.

Features	PipeDrive	SalesForce	HubSpot	ClaritySoft
Free trial	✓	✓	✓	✗
Pricing	Monthly per user: Essential: $14.90 Advanced: $27.90 Professional: $49.90 Power: $64.90 Enterprise: $99.00	Monthly per user: Essentials: $25 Professional: $75 Enterprise: $150 Unlimited: $300	Monthly: Starter: $20 Professional: $400 Enterprise: $1,200 Price depends on which plan you choose	Monthly per user: Professional: $39 Accelerator: $49 Enterprise: $69 3 user minimum
Ideal number of users	1-499	2-1,000+	1 – 1,000+	1-1,000+
Training	On-line webinars	Live on-line or webinars depending on plan	Live on-line or webinars depending on plan	Live on-line
Data storage	Unlimited, all plans	Varies by plans	Varies by plan	Varies by plans, Unlimited at Enterprise
Meeting scheduler	Yes	Yes	Yes	Yes
Calendar/Reminder System	Yes	Yes	No	Yes
Commission Management	No	Yes	No	No
Sales Pipeline Mgt	Yes	Yes	Yes	Yes
Proposal Generation	Yes	Yes	Yes	Yes
Support	24/7 (email/web chat)	24/7 (live rep) Premier+ Standard only tutorials and community support	24/7 (email/web chat) Starter+ 24/7 (live rep) Professional+	24/7 (live rep)
Custom record fields	Unlimited, all plans	Limited/extra cost, all plans	Yes	Accelerator+ plans
Customizable dashboards/reports	All plans	All plans	All plans	All plans
Email integration Gmail or Outlook	All plans	All plans	All plans	All plans
Forecasting	Yes	Professional and up	Yes	Yes
Email send & tracking	Yes	Yes	Yes	Yes
Lead scoring	Professional and up	Professional and up	Yes	No
Mobile app	All plans	All plans	All plans	All plans
Workflow automation	Advanced and up	Enterprise and up	Yes	Accelerator+ plans
Marketing automation tool	Yes	Yes, additional cost	Yes included	Yes, additional cost
Open API	All plans	Enterprise plan+	All plans	Accelerator+ plans

Special note: This data was compiled on 07/07/23 - keep in mind CRM systems change often so to see the latest features listed and more by plan visit the CRM website or Capterra.