Squeeze Growth.

2027 EDITION

The CRM Pick Kit

Choose the right CRM for your sales team in about 5 minutes, then get it set up without the usual mess.

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5-minute decision flow by team size, sales style and budget

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Side-by-side matrix of Pipedrive, HubSpot, Attio, Zoho and GoHighLevel

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Red flags to check before you pay for seats

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STEP 1 · 5 MINUTES

Pick your CRM in 5 questions

Start at question 1. The first "yes" is your shortlist pick. If you get to the end with no yes, Pipedrive is the safe default for most small sales teams.

1 **Are you an agency managing CRMs, funnels or billing for clients?**
You need sub-accounts, white-label options and marketing tools under one roof.

→ **Yes: GoHighLevel**
Built for agencies. Expect a steep learning curve.

NO ↓

2 **Do you want sales, marketing and service in one platform, and start free?**
Your team will grow into marketing emails, service tickets and a big app marketplace.

→ **Yes: HubSpot**
Free to start, more resources and integrations.

NO ↓

3 **Are you a startup that wants to design its own data model and workflows?**
Your process is not a classic sales funnel, or you want AI built into the records.

→ **Yes: Attio**
Very flexible, free plan, limited AI credits.

NO ↓

4 **Do you run complex workflows and have someone technical in-house?**
You want deep reports, lots of customization and more features per price tier.

→ **Yes: Zoho CRM**
Feature-rich, free plan for small teams.

NO ↓

5 **Do you want a visual pipeline your reps actually use, set up this week?**
A small or growing team that sells deal by deal and wants less admin, not more.

→ **Yes: Pipedrive**
Quick setup, clear pipeline, strong integrations.

Budget check: HubSpot, Attio and Zoho all have free plans. Pipedrive has a free trial and its Lite plan starts at $14 per seat per month on annual billing ($19 month to month). GoHighLevel starts at $97 per month for the account. Prices are from our reviews, so confirm on the vendor's pricing page before you buy.

STEP 2 · COMPARE

Who wins where

This matrix sums up the verdicts from our head-to-head reviews. It is not a lab score. It tells you where each tool is strong and where you will feel the limits.

	Pipedrive	HubSpot	Attio	Zoho CRM	GoHighLevel
Setup and ease	Strong Quick to set up and easy to navigate	Good Lots of free resources to learn	Good Flexible, so you build more yourself	Watch Best with in-house dev support	Watch Steep learning curve
Sales pipeline	Strong Clear winner on deal pipelines vs HubSpot, unlimited boards	Good Feature rich, but caps pipeline creation	Strong Pipelines for any workflow, not just sales	Good Best for complex workflows	Good Pipelines plus funnels in one place
Customization	Good Easy to customize, a bit rigid for complex needs	Good Build your own bundle of hubs	Strong Custom database you design	Strong Wide range of features and customization	Strong Very flexible, white-label options
AI and automation	Good If/then workflows and an AI sales assistant	Strong Over 1,000 predefined workflows	Strong AI is more built in than Pipedrive's	Strong Zia AI and advanced workflows	Strong Automates almost every stage
Integrations	Strong Grouped by revenue cycle, easy to find	Strong Marketplace with over 1,500 integrations	Watch Fewer third-party integrations than Pipedrive	Strong 1,000+ apps plus Zoho's own suite	Good Smaller ecosystem, Zapier, API and webhooks
Team communication	Strong Best for sales outreach and email, universal inbox	Strong Excellent team communication tools	Strong Better team collaboration than Pipedrive	Strong Better built-in communication system	Strong Strong AI for communication
Free option	Trial Free trial, no free plan	Free plan Free to start	Free plan Up to 3 users, about 50k records	Free plan Up to 3 users	Trial Free trial
Best for	**Small and growing sales teams**	**Teams that want one platform**	**Startups building custom workflows**	**Complex processes on a budget**	**Agencies**

Strong a standout in our review Good solid, with trade-offs Watch check this before you commit

STEP 3 · SHORTLIST

The five CRMs at a glance

One honest line on each: who it fits, what you get, and when to pick it.

OUR PICK FOR MOST SMALL SALES TEAMS

Pipedrive

- Visual drag and drop deal pipeline, unlimited boards
- If/then automation for routine admin
- Built-in AI that finds info, drafts emails and summarizes conversations
- Universal inbox, live chat widget and web forms
- Deal probability for revenue forecasts
- Integrations grouped by revenue cycle

Pick this if you want your reps working a clear pipeline this week, not configuring a database for a month.

Lite from $14 per seat per month billed annually, $19 month to month. Free trial available.

Try Pipedrive free →

ALL IN ONE

HubSpot

- Sales, marketing and service hubs
- Over 1,000 predefined workflows
- Over 1,500 integrations

Pick this if you want to start free and grow into marketing and service tools.

See HubSpot →

BUILD YOUR OWN

Attio

- Custom database and workflows
- AI built into the records
- Connects to ChatGPT and Claude

Pick this if you are a startup with a process that does not fit a standard funnel.

Read Pipedrive vs Attio →

FEATURE RICH

Zoho CRM

- Zia AI and advanced workflows
- Custom reports and dashboards
- Syncs with Zoho's other apps

Pick this if you have complex workflows and technical help in-house.

Try Zoho CRM →

FOR AGENCIES

GoHighLevel

- Funnels, CRM and marketing automation
- White-label client management
- Invoices and payments built in

Pick this if you run an agency and want client work under one roof.

Read Pipedrive vs GoHighLevel →

STEP 4 · BEFORE YOU PAY

7 red flags to check before you buy seats

Most CRM regret comes from limits nobody read about on the pricing page. Check these during your trial.

1

Per-seat record limits

Some plans cap active leads and deals per seat. Pipedrive's Lite plan, for example, gives 2,500 per seat. Count your open deals before you choose a tier, or you will end up buying seats just to store records.

2

Caps on pipelines

HubSpot puts a cap on how many pipelines you can create, while Pipedrive allows unlimited boards. If you sell more than one product or run renewals separately, check this first.

3

AI credits that run out

Attio is generous with records but gives limited AI credits. If AI enrichment or summaries are why you are buying, find out what happens when the credits are gone.

4

A learning curve your team will not climb

Feature-rich tools like GoHighLevel have a steep learning curve. If your reps will not open it daily, the extra features do nothing for you.

5

Setup that needs a developer

Zoho shines with complex workflows, but it suits companies with in-house dev support. Ask who will own the setup after the trial ends.

6

Monthly versus annual pricing

The headline price is often the annual one. Pipedrive's Lite plan is $14 per seat billed annually but $19 month to month. Compare the price you will actually pay.

7

Missing integrations you rely on

List the 5 apps your team uses every day (email, calendar, calling, billing, chat) and confirm each one connects before you migrate a single contact.

STEP 5 · COPY THIS

Pipedrive quick-start pipeline

A simple 5-stage pipeline you can build in Pipedrive in one sitting. Each stage has one clear exit rule, so reps never argue about where a deal belongs.

STAGE 1
Qualified
The lead has a real need, a budget range and a person who can say yes.

Move on: first call booked

STAGE 2
Contact made
You have spoken, confirmed the problem and agreed on next steps.

Move on: demo date set

STAGE 3
Demo done
They have seen how you solve their problem and know what it costs.

Move on: proposal requested

STAGE 4
Proposal sent
A written offer is in their inbox with a clear end date.

Move on: terms being discussed

STAGE 5
Negotiation
Working out final terms with the decision maker.

Exit: won or lost, with a reason

Set up in this order

- Rename the default stages to match the five above
- Add a win probability to each stage so forecasts make sense
- Create 3 custom fields you will really use, such as lead source, deal size band and close reason
- Connect email and calendar first, everything else second
- Add the web form or live chat widget to capture leads into stage 1

Automations to turn on first

- New deal in stage 1: create a "book first call" task
- Deal moved to stage 4: create a follow-up task 3 days later
- Deal sits in one stage too long: alert the owner
- Deal lost: require a lost reason so you learn from it
- Use the AI assistant to summarize long email threads before calls

Want to try this? Pipedrive has a free trial, so you can build this exact pipeline and test it with real deals before paying. **Start your Pipedrive trial →**

STEP 6 · FIRST 30 DAYS

Setup and migration checklist

Moving from spreadsheets or another CRM? Work through this in order and you will avoid the classic dirty-data mess.

Before you switch

- [ ] Write down your current sales stages, even if they live in a spreadsheet
- [ ] Export all contacts, companies and open deals to CSV
- [ ] Delete duplicates and dead leads before import, not after
- [ ] Pick one owner for the CRM setup

Week 1: build

- [ ] Create your pipeline stages and exit rules
- [ ] Add only the custom fields you will report on
- [ ] Import a small test batch of about 50 records and check every field
- [ ] Connect email, calendar and your must-have apps

Week 2: move in

- [ ] Import the full list and spot-check deal values and owners
- [ ] Turn on 3 to 5 automations, not 30
- [ ] Run a one-hour team walkthrough using real deals
- [ ] Set the rule: if it is not in the CRM, it did not happen

Weeks 3 and 4: tune

- [ ] Review stuck deals every week in one short pipeline meeting
- [ ] Build one dashboard: deals won, deals lost, and why
- [ ] Ask reps what slows them down and remove one field or step
- [ ] Decide on your paid plan before the trial ends

GO DEEPER

Still choosing? Read the full matchups.

Every verdict in this kit comes from our detailed reviews. These go feature by feature with pros, cons and pricing.

Pipedrive vs Attio
Ready-made pipelines or build-your-own workflows

Pipedrive vs HubSpot
Focused sales tool or all-in-one platform

Pipedrive vs Zoho
Simplicity or deep customization

Pipedrive vs GoHighLevel
Sales CRM or agency platform

Best CRM software for startups
15 tools compared

Best HubSpot alternatives
15 options if HubSpot is too much

Ready to test a pipeline with real deals?

Pipedrive is our pick for most small sales teams. The free trial is the fastest way to see if it fits.

Start a free Pipedrive trial →

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