SoftwareBattleCard

Top CRM Software

ANALYST CERTIFIED

Requirements Evaluated: **193**

	Zoho CRM	Salesforce Sales Cloud	HubSpot Sales
Overall Score	91	85	83
1 Functional Requirements	91	85	83
1.1 Accounts and Contacts Management	91	79	71
1.1.1 Territory User Management	100	100	70
1.1.2 Email Verification and Suggestion	50	50	60
1.1.3 Contacts Map	100	50	50
1.1.4 Contacts Recommendation	70	60	70
1.1.5 Account Management	100	100	100
1.1.6 Territory Management	100	100	100
1.1.7 Account Hierarchy	100	100	100
1.1.8 Territory Hierarchy	100	100	0
1.1.9 Organization Charts	50	100	50
1.1.10 Appointment Scheduling	100	85	100
1.1.11 Contact Management	100	100	100
1.1.12 Group Appointment Scheduling	100	0	100
1.1.13 AI-Based Sales Recommendation	100	60	0
1.2 Customer Communication Management	87	78	87
1.2.1 Email Templates	100	100	100
1.2.2 Call Reminders	100	100	85
1.2.3 SMS Interaction	70	60	70
1.2.4 SMS Scheduling	70	60	70
1.2.5 SMS Analytics	70	60	70
1.2.6 Mass Email	100	100	100
1.2.7 Call Scheduling	100	100	85
1.2.8 Built-in Caller	70	60	100
1.2.9 Canned Responses	100	60	100
1.2.10 Call Popup	100	60	85
1.2.11 Email Status	100	100	100
1.2.12 Automatic Voicemails	50	60	100
1.2.13 Email Scheduling	100	100	100
1.2.14 Call Logs	100	60	100
1.2.15 Email Association with CRM Records	100	100	
1.2.16 Call Tagging	70	100	
1.2.17 Direct Email Communication	100		
1.2.18 Email Client Integration	100		
1.2.19 Call Recording			
1.2.20 Artificial Intelligence in Email Management			
1.2.21 SMS Templates			
1.3 Dashboards and R			
1.3.1 Pre-I			

2024 Software COMPARISON REPORT

About Software BattleCard

Software BattleCard provides research and tools for IT professionals and business analysts engaged in the evaluation of technology solutions to meet their business objectives.

As a division of **SelectHub**, Software BattleCard offers analyst-vetted enterprise software evaluations, proprietary tools and flexible, high-value selection services.

Software BattleCard leverages SelectHub's technology selection management (TSM) platform to provide criteria for requirements criteria and vendor ratings.

The requirements sets and BattleCard solution scores contain the most prevalent selection criteria curated from analyst reports and third-party authorities and consolidated with high-priority requirements generated via SelectHub's own user community. Where possible, certain functionality is cross-verified via vendor briefings and online demos.
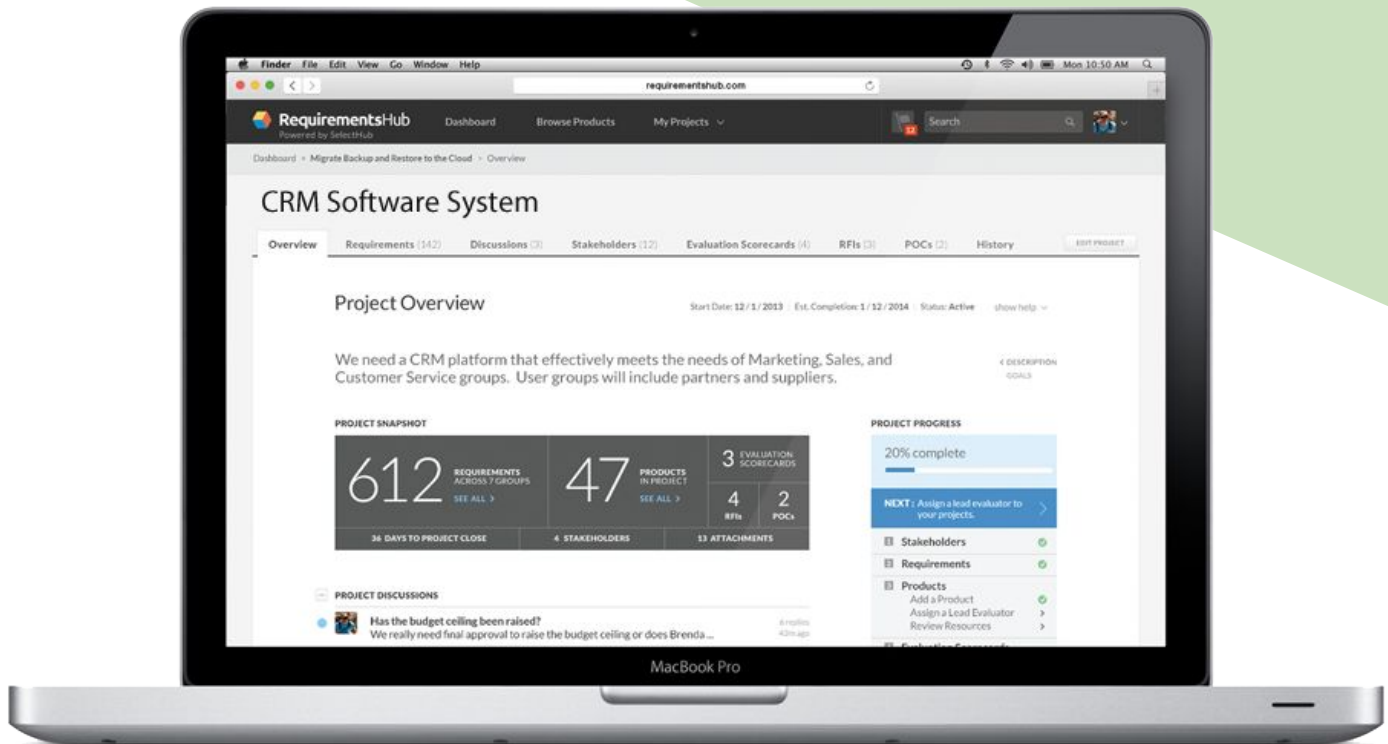
Selection Services

Selection services offered by Software BattleCard are conducted by SelectHub specialists with a promise to save time, money, eliminate risk, and reduce software acquisition costs for our clients.

SoftwareBattleCard>

Call 855-850-3850 for a free consultation

CRM Software Requirements Checklist

Easily Create and Prioritize Professional CRM Requirements

1. Select your free analyst sourced requirements template.
2. Use our requirements tool to prioritize and manage your requirements.
3. Export your requirements to any system or file format.

Access Free Checklist

SoftwareBattleCard>

Call 855-850-3850 for a free consultation

Top 30 CRM Software Comparison

Zoho CRM

HubSpot Sales Hub

monday sales CRM

Sugar Sell

ORACLE SALES CLOUD

Pipeliner

salesforce

Microsoft Dynamics 365

freshsales

Creatio formerly bpm'online

SAP

pipedrive

Get Free Report

SoftwareBattleCard>

Call 855-850-3850 for a free consultation

SoftwareBattleCard>

Top CRM Software

		Zoho CRM	Salesforce Sales Cloud	HubSpot Sales
Requirements Evaluated: 196	ANALYST CERTIFIED			
Overall Score		**91**	**85**	**83**
1 Functional Requirements		**91**	**85**	**83**
1.1 Accounts and Contacts Management		**91**	**79**	**71**
1.1.1 Territory User Management		100	100	70
1.1.2 Email Verification and Suggestion		50	50	60
1.1.3 Contacts Map		100	50	50
1.1.4 Contacts Recommendation		70	60	70
1.1.5 Account Management		100	100	100
1.1.6 Territory Management		100	100	100
1.1.7 Account Hierarchy		100	100	100
1.1.8 Territory Hierarchy		100	100	0
1.1.9 Organization Charts		50	100	50
1.1.10 Appointment Scheduling		100	85	100
1.1.11 Contact Management		100	100	100
1.1.12 Group Appointment Scheduling		100	0	100
1.1.13 AI-Based Sales Recommendation		100	60	0
1.2 Customer Communication Management		**87**	**78**	**87**
1.2.1 Email Templates		100	100	100
1.2.2 Call Reminders		100	100	85
1.2.3 SMS Interaction		70	60	70
1.2.4 SMS Scheduling		70	60	70
1.2.5 SMS Analytics		70	60	70
1.2.6 Mass Email		100	100	100
1.2.7 Call Scheduling		100	100	85
1.2.8 Built-in Caller		70	60	100
1.2.9 Canned Responses		100	60	100
1.2.10 Call Popup		100	60	85
1.2.11 Email Status		100	100	100
1.2.12 Automatic Voicemails		50	60	100
1.2.13 Email Scheduling		100	100	100
1.2.14 Call Logs		100	60	100
1.2.15 Email Association with CRM Records		100	100	100
1.2.16 Call Tagging		70	100	0
1.2.17 Direct Email Communication		100	85	100
1.2.18 Email Client Integration		100	100	100
1.2.19 Call Recording		70	50	100
1.2.20 Artificial Intelligence in Email Management		100	60	85
1.2.21 SMS Templates		70	50	70
1.3 Dashboards and Reports		**99**	**97**	**87**
1.3.1 Pre-built Reports		100	100	100
1.3.2 Call Analytics		100	100	70
1.3.3 Pre-built Dashboards		100	100	100
1.3.4 User Homepage or Dashboard		100	100	100
1.3.5 Activity Reports		85	100	100
1.3.6 Deal Reports		100	100	100
1.3.7 Report Preview		100	100	60

1.3.8 API Usage Dashboard	100	100	70
1.3.9 Dashboard Sharing	100	100	100
1.3.10 Charts and Visualizations	100	100	100
1.3.11 Embed Chart	100	100	0
1.3.12 Custom Reports	100	100	100
1.3.13 Email Reports	100	60	100
1.3.14 Report Sharing	100	100	100
1.3.15 Customizable Dashboard	100	100	100
1.4 Documents Management	**78**	**89**	**100**
1.4.1 Version History	100	100	100
1.4.2 Document Sharing	100	100	100
1.4.3 Advanced Search Capabilities	85	60	100
1.4.4 Document Conversion	0	100	100
1.4.5 Playbooks	60	60	100
1.4.6 Document Repository	100	100	100
1.4.7 File Attachments	100	100	100
1.5 Leads Management	**93**	**75**	**96**
1.5.1 Leads Capture	100	100	100
1.5.2 Email Parser	100	70	100
1.5.3 Win-Loss Analysis	60	85	85
1.5.4 Card Scanner	100	70	100
1.5.5 Artificial Intelligence in Lead Management	100	60	100
1.5.6 Lead Scoring	100	100	100
1.5.7 Data Enrichment	100	50	100
1.5.8 LinkedIn Prospects Capture	70	25	70
1.5.9 Artificial Intelligence in Lead Conversion	100	60	100
1.5.10 Automatic Lead Distribution	100	100	100
1.6 Opportunities/Deals Management	**96**	**90**	**94**
1.6.1 Sales Pipeline / Kanban View of Opportunities	70	100	100
1.6.2 Opportunity Management	100	100	100
1.6.3 Artificial Intelligence in Opportunity Management	100	60	70
1.6.4 Opportunity Rotting	100	100	100
1.6.5 Journey Designer	100	60	85
1.6.6 Activity Management	100	100	100
1.6.7 Opportunity Probability	100	100	100
1.6.8 Multiple Sales Pipeline	100	100	100
1.7 Partners and Vendors Management	**83**	**62**	**73**
1.7.1 Partner Relationship Management	100	60	85
1.7.2 Automated Sharing	100	60	85
1.7.3 Vendor Portal	100	70	0
1.7.4 Partner Scorecard	0	60	100
1.7.5 Partner Portal	100	60	85
1.7.6 Portal Permissions	100	60	85
1.8 Platform Capabilities	**93**	**92**	**84**
1.8.1 Custom Layouts	100	100	100
1.8.2 Custom Branding	70	100	100
1.8.3 Notes	100	100	100
1.8.4 Custom Views and Filters	100	100	100
1.8.5 Real-time Notifications	100	100	100
1.8.6 Custom Modules	100	100	100
1.8.7 Color Coded Icons	100	25	0
1.8.8 Multi-Language	100	100	100
1.8.9 Follow-up Reminders	100	100	100
1.8.10 Custom Apps	25	100	25
1.8.11 Custom Fields	100	100	100
1.8.12 Configuration Deployment	100	100	50
1.8.13 Multiple Currencies	100	100	100
1.8.14 Sandbox Environment	100	100	85
1.8.15 Bulk View	100	50	85
1.8.16 Case Management	100	100	100
1.9 Products Management	**93**	**96**	**75**
1.9.1 Product Catalog	70	100	100
1.9.2 Custom Products	100	100	100
1.9.3 Custom Portals	100	85	0
1.9.4 Product Groups	100	100	100
1.10 Quotes, Orders, and Contracts Management	**70**	**96**	**66**

1.10.1 Invoice Management	100	60	85
1.10.2 Quote Generation	100	100	100
1.10.3 Contract Creation	60	100	50
1.10.4 Contract Management	100	100	100
1.10.5 Order Generation	100	100	100
1.10.6 Order Segmentation	0	100	0
1.10.7 Order History	100	100	70
1.10.8 Supply and Payments Schedule	70	100	85
1.10.9 Automatic Creation of Orders	0	100	0
1.11 Sales Performance Management	98	87	84
1.11.1 AI-Based Anomaly Detector	100	60	100
1.11.2 Gamification	85	60	50
1.11.3 AI-Based Coaching Actions	100	60	50
1.11.4 Sales Campaigns	100	100	85
1.11.5 Sales Forecasting	100	100	85
1.11.6 Target Achievement	100	100	100
1.11.7 Goals Management	100	100	100
1.12 Social Engagement	94	65	73
1.12.1 Social Media Integration	70	60	60
1.12.2 Social Interaction and Tracking	100	60	60
1.12.3 Triggers	100	60	85
1.12.4 Keyword Tracking	100	60	100
1.12.5 Widgets	100	85	60
1.13 Team Collaboration	100	92	68
1.13.1 User Groups	100	100	100
1.13.2 GeoTagging	100	50	70
1.13.3 @Mention	100	100	100
1.13.4 Feeds	100	100	0
1.13.5 Tags	100	100	70
1.13.6 Private Chat	100	100	70
1.14 Workflows and Process Automation	100	88	82
1.14.1 Approval Rules	100	70	85
1.14.2 Validation Rules	100	100	25
1.14.3 Workflow Rules	100	100	100
1.14.4 Sales Process Editor	100	100	100
1.14.5 Predefined Workflow Templates	100	70	100
2 Technical Requirements	97	93	94
2.1 Availability and Scalability	100	100	96
2.1.1 Dynamic Scaling	100	100	100
2.1.2 Fault Tolerance	100	100	100
2.1.3 High Availability	100	100	100
2.1.4 Scalability	100	100	85
2.2 Deployment Options	100	100	100
2.2.1 SaaS Option	100	100	100
2.3 Integration and Extensibility	98	91	95
2.3.1 CPQ Integration	100	50	50
2.3.2 Office 365 Integration	100	100	100
2.3.3 Web Forms Platform Integration	85	50	100
2.3.4 Data Integration Tools Integration	100	100	100
2.3.5 Landing Pages Builder Integration	100	100	100
2.3.6 Webhooks	100	50	100
2.3.7 Calendar Integration	100	100	100
2.3.8 BI Software Integration	85	100	50
2.3.9 Sales Data and Intelligence Platform Integration	100	100	100
2.3.10 Video Conferencing Platform Integration	100	100	100
2.3.11 Data Export	100	100	100
2.3.12 G-Suite Integration	100	100	100
2.3.13 Accounting Systems Integration	100	85	100
2.3.14 Business Phone Systems Integration	100	100	100
2.3.15 APIs	100	100	100
2.3.16 Project Management Systems Integration	60	100	100
2.3.17 Cloud Files Storage Systems Integration	100	100	100
2.3.18 Data Import	100	100	100
2.3.19 ERP Systems Integration	100	50	50
2.3.20 Enterprise Collaboration Platforms Integration	100	100	100
2.3.21 HelpDesk Systems Integration	100	100	100

2.3.22 Document Generation and e-Signature Platform Integration	100	100	100
2.3.23 Messaging Platform Integration	100	100	100
2.3.24 Marketing Automation Integration	100	100	100
2.3.25 Scheduling Tools Integration	100	100	100
2.3.26 Email Marketing Platform Integration	100	100	100
2.3.27 E-Commerce Platform Integration	100	50	100
2.3.28 Widgets	100	100	100
2.4 Mobile Support	100	100	67
2.4.1 Offline Access	100	100	0
2.4.2 Native Mobile Apps	100	100	100
2.4.3 Responsive Design	100	100	100
2.5 Platform Security	90	93	100
2.5.1 Compliance	100	100	100
2.5.2 Role-Based Permissions	100	100	100
2.5.3 Two Factor Authentication	70	100	100
2.5.4 Activity Logs	100	100	100
2.5.5 Single Sign-on and Trusted Authentication	70	100	100
2.5.6 Data at Rest Encryption	100	60	100
3 Vendor Qualification Requirements	77	94	88
3.1 Professional Services and Maintenance	50	100	50
3.1.1 Implementation Services	0	100	100
3.1.2 Implementation Price Capping	100	100	0
3.2 Training	30	100	70
3.2.1 Certifications	0	100	100
3.2.2 Training Material	100	100	100
3.2.3 In-Product Help and Suggestions	0	100	100
3.2.4 Free Live Training	0	100	0
3.3 User Support	100	86	100
3.3.1 FAQs	100	100	100
3.3.2 SLA	100	100	100
3.3.3 Chat and Instant Message	100	100	100
3.3.4 Forums and Community Support	100	100	100
3.3.5 Phone and Email	100	100	100
3.3.6 Penalties	100	0	100
3.3.7 24x7 Technical Support	100	100	100
3.4 Vendor Information	91	100	100
3.4.1 Public Entity	0	100	100
3.4.2 Customer Base	100	100	100
3.4.3 Free Trial	100	100	100
3.4.4 User Ratings	100	100	100
3.4.5 Financial Stability	100	100	100
3.4.6 References	100	100	100

Zoho CRM: Highlights

Improve Performance With AI: Use Zia, its AI-driven self-learning assistant, to search your database in seconds, improve data accuracy, optimize timing for emails and calls, and understand email and message sentiments.

- **Predict Leads and Deals:** Analyze sales data to determine what contributes to closed or lost deals and use it to auto-generate lead scores for current opportunities.

- **Detect Anomalies:** Receive alerts when sales performance doesn't meet predicted trends.

- **Get Recommendation:** Get apt recommendations for your business at the right time based on behavioral patterns. Offer cross-selling, up-selling, retention and renewal offers to the right clients and prospects on time.

Multi-Language Support: It offers 26 languages, including Spanish, French, Italian and German.

Create Unique Solutions: A developer console lets you create integrations and extensions to enhance the system. Provides widgets, a REST API and SDKs. Its point-and-click ability caters to users of any technical level.

Critical Integrations: Analyze ad campaigns through the Google Ads integration, import customers and track purchased products with the Shopify extension and sync order and customer data in real time with its WooCommerce plugin.

Zoho CRM: Highlights

Migrate Quickly: If you're switching from another CRM, don't worry about getting bogged down in the migration process. A feature called Zwitch helps move all your existing data into Zoho CRM.

Ecosystem: Offers a vast ecosystem of over 45 business apps, including accounting, commerce, CRM, supply chain, business intelligence, HR and more.

Free CRM: Small businesses can leverage capabilities to enhance and grow without spending a dime.

Zoho lets you manage deals through its intuitive interface

Zoho CRM: Key Benefits

Centralize Your Communication Channels: Manage all leads and customers from within the CRM. Access email, phone, social media and other channels. Centrally monitor and respond to interactions across every stage of the customer lifecycle.

Make Sense of Data: Get a better understanding of business data with intuitive visualizations like pie charts and heat maps. Track performance with real-time KPIs across the sales cycle. Drill into data or compare metrics based on custom filters to improve performance evaluation.
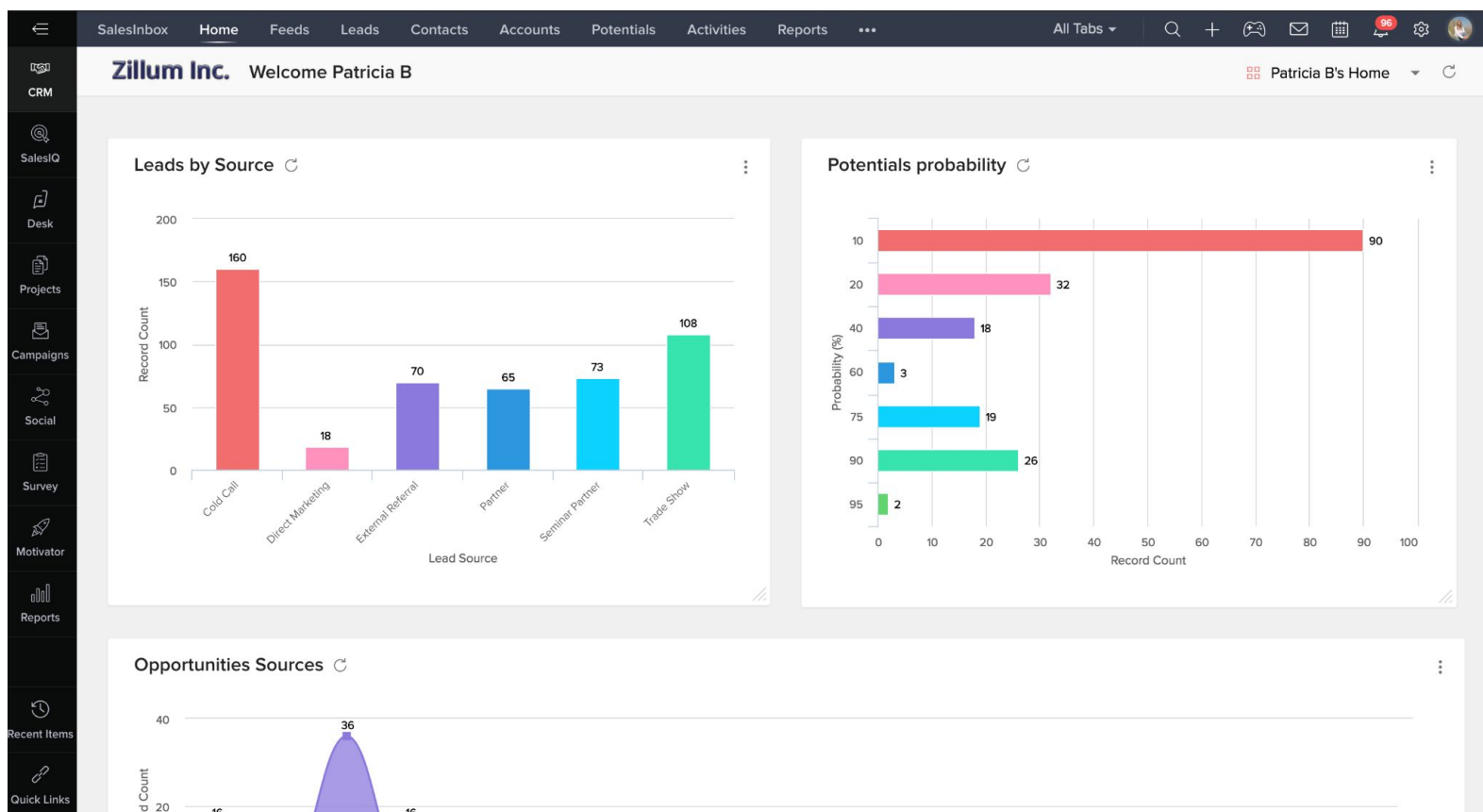
Get real-time KPI visibility with Zoho dashboards

Zoho CRM: Key Benefits

Act in Context: Add adequate context to conversations and give teams across departments complete visibility of their leads and contacts by attaching every interaction with their profile. Use filters to find specific information quickly.

Save Time: Its workflow rules allow teams to be more productive by automating repetitive, time-consuming tasks. Extend these capabilities to third-party apps with webhooks.

Native Mobile App: Available on Android and iOS devices, the app lets you scan cards, manage schedules, share insights, track customer communication and sales visits and more.

Zoho CRM: User Review Summary

Strengths

Work Offline: 70% of relevant reviews suggest the platform functions well even when used in offline mode.

Business Management: 80% of relevant reviews suggest the system monitors business performance, populates the website with suitable visitors and keeps a tab on productivity and output.

Affordable: 60% of users suggest the software is more budget-friendly than other CRMs and has considerably more price-adaptive features.

Integrations: 40% of relevant reviews found it supports unified workflows, flexibility and email functionality.

Weaknesses

User Interface: 80% of users had issues with the interface and didn't find it easy to use or adaptive.

Customer Support: 60% of users found Zoho's customer support and inquiry resolution teams unresponsive. However, the chat support is comparatively better.

Automation: 40% of reviews on automation suggest it restricts productivity. Many users noted that many automation capabilities were limited to its enterprise version.

Customizations: 50% of relevant reviews suggest it lacks customizability, noting it could provide options like page customizations, drop boxes and fonts.

Call 855-850-3850 for a free consultation

Zoho CRM: Analyst Summary

Zoho CRM is a web-based platform that assists businesses with robust features such as lead and contact management, sales pipeline management, opportunity tracking, lead import, data analysis and more. Integrations and business management capabilities add a lot of functionality.

However, its UI isn't intuitive for many users, and it could benefit from more customizations. Users also found its automation lacking. It works well for SMBs and the mobile platform, equipped with offline mode, helps users cater to customers anytime, anywhere without limitations. Overall, it's a powerful and affordable solution for businesses of all sizes.

Call 855-850-3850 for a free consultation

Salesforce Sales Cloud: Highlights

Extensive Customer Support: The Trailblazer community offers answers to technical questions and self-service opportunities.

Efficient Opportunity Management: Respond and track associated activities quickly using a 360-degree view of important deals and real-time notifications. Check customer or competitor activity from the timeline.
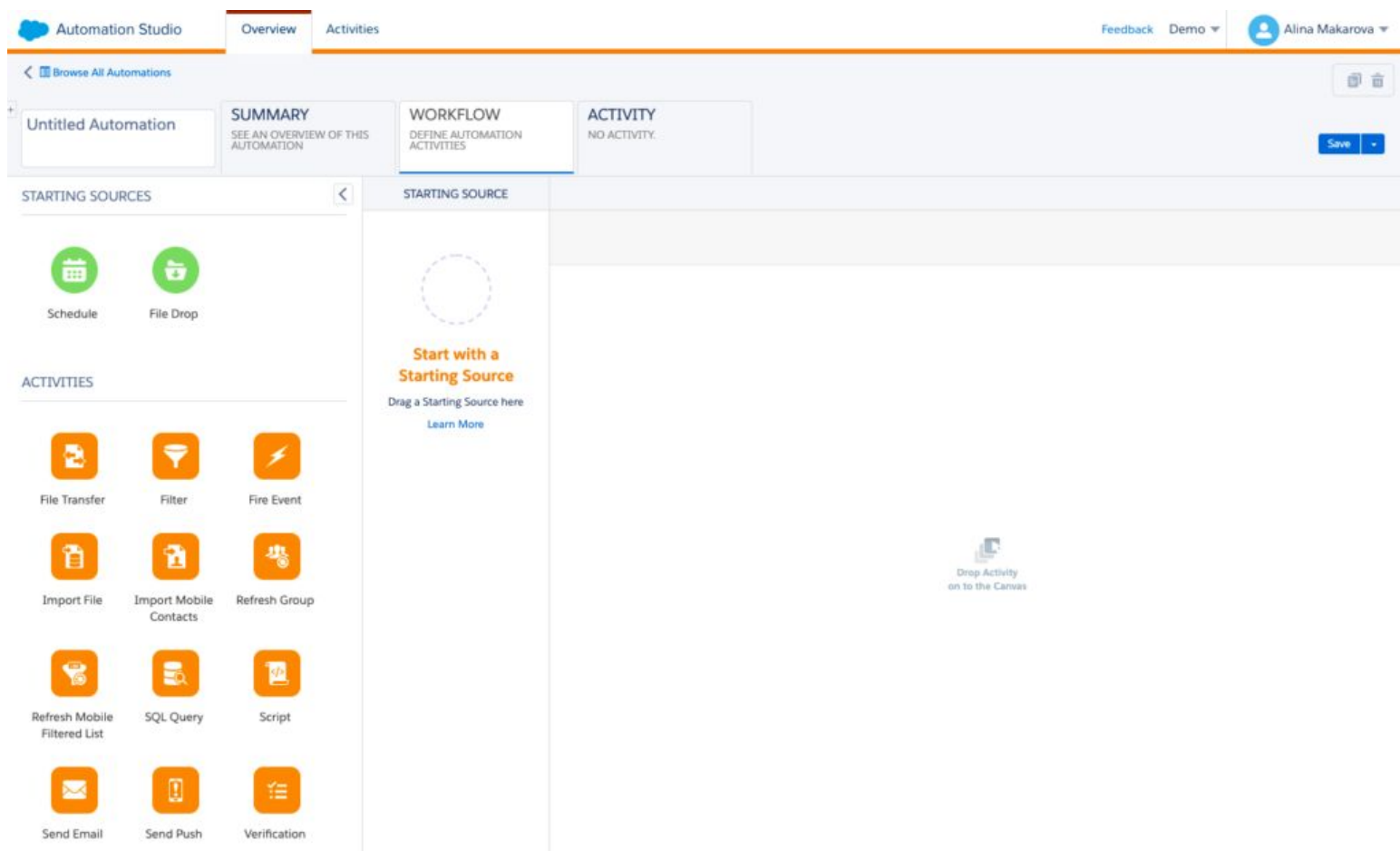
Automate sales workflows with Salesforce´s Automation studio

Salesforce Sales Cloud: Highlights

AI-Assisted Insights: Leverage Einstein AI to obtain deep insights. Analyze historical sales channel data to make future predictions and evaluate prior effectiveness.

- **On-Demand Support:** Deploy chatbots equipped with Natural language processing (NLP) and relevant platform data to automate customer responses.

Automatic Quote Generation: With built-in quoting capabilities, it auto-populates quotes with appropriate customer data. Generate PDFs using approved templates and email those to customers.

Enhanced Customer Engagement: Improve audience engagement through personalized messages, understand user interests through a detailed study of prospect history, track campaign performance with an interactive dashboard and reach out promptly based on real-time alerts.

Extensive Integrations: Offers more than 1,200 integrations of free and paid applications, including Slack, QuickBooks, Mailchimp, JIRA and DocuSign. It provides developer tools and multiple APIs such as REST API, SOAP API, Data API, Bulk API and Streaming API. Additionally, integration with Zapier offers access to more than 2,000 additional third-party apps.

Adapts to Business Needs: Don't get stuck with a system that doesn't fit current processes. Offers extensive customizations, including forecasting and sales stages, reports, and dashboards with modifiable charts.

Salesforce Sales Cloud: Key Benefits

Partner and Channel Management: Handle all aspects of partner and channel operations, including recruitment, onboarding and training. Build cross-channel experiences and customize channel programs.

Real-Time Forecasts: Make informed decisions with relevant real-time data. Updates adjustments instantly to ensure forecast accuracy.

Embed Chart: You can embed customized reports to third-party dashboards using unique codes.
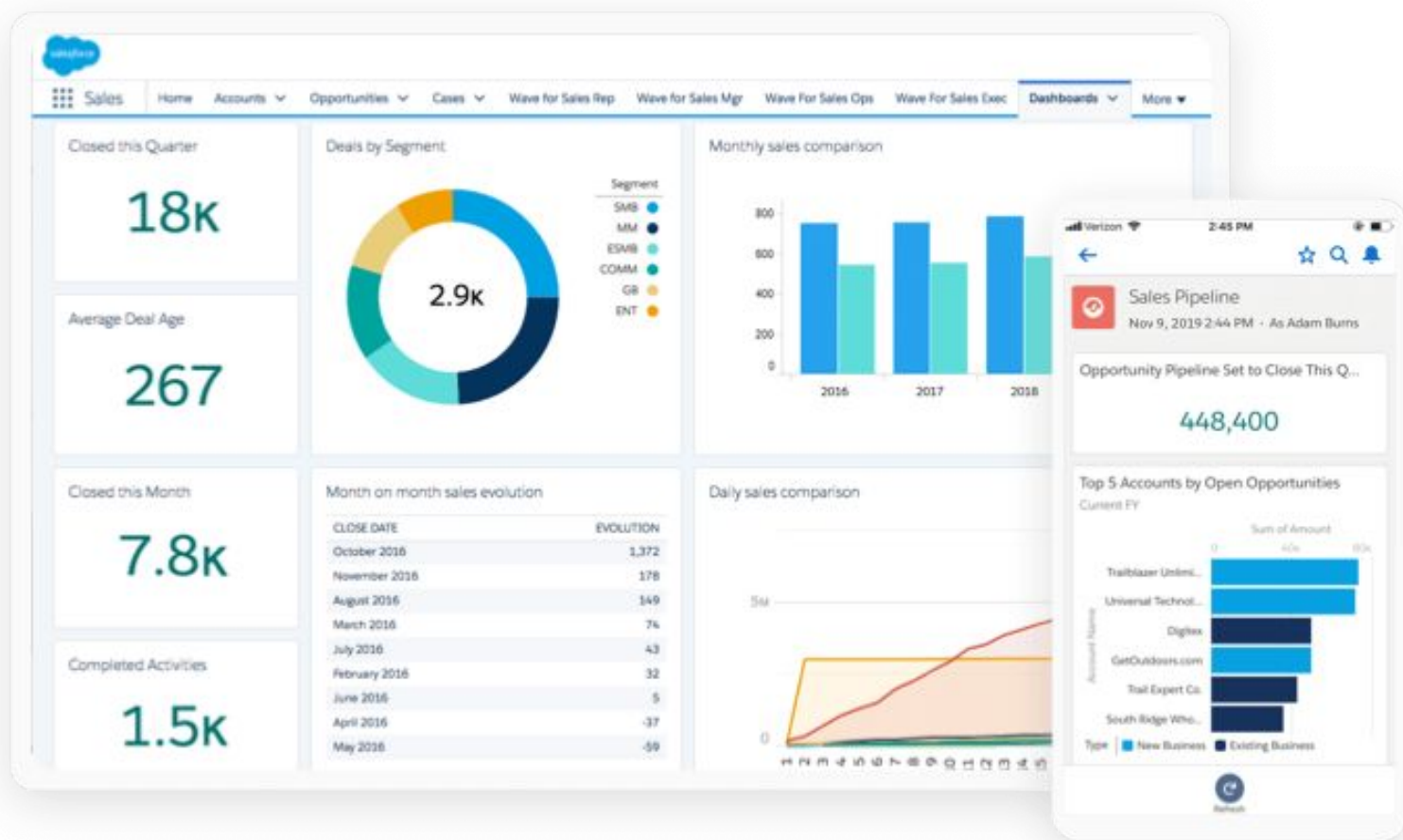
Access Salesforce dashboards from anywhere

Call 855-850-3850 for a free consultation

Salesforce Sales Cloud: Key Benefits

Enhance Sales Performance: Drive higher sales performance by using real-time leaderboards to track sales rep performance. Gain full visibility into the whole pipeline and act accordingly.

Email Scheduling: Schedule emails for specific dates and times or choose from predetermined times and interval periods. Edit emails before delivery and schedule them in the Lighting Experience.

Unify Brand Across Communities: Maintain a consistent brand online by adding company branding to apps and Lightning Communities developed internally. List apps in the Apple App and Google Play stores.

Scale Based on Business Needs: Easily scale up as the business grows using its integrations to add capabilities that work seamlessly.

Stay Organized: Gain a single source of truth using a central solution to store customer information — pull sales reports, view customer tickets, track lead progress through the pipeline and more.

Product Enhancements: The vendor implements new features regularly based on feedback, constantly enhancing functionality to serve customers better.

Salesforce Sales Cloud: User Review Summary

Weaknesses

Cost: 90% of relevant reviews found it relatively expensive, especially for small businesses.

Loading Time: 90% of relevant reviews found the system heavy on the network, taking a while to load at times.

Learning Curve: 60% of reviews on reported found it takes time and training to learn to navigate its interface.

Marketing Automation: 66% of users referencing marketing automation found it doesn't let users generate suggestions and implement organizational conversations.

Call 855-850-3850 for a free consultation

Salesforce Sales Cloud: User Review Summary

Strengths

Integration: 85% of reviews suggest it supports integration with numerous tools.

Centralized Client Database: 95% of reviews on contact management suggest it offers powerful data management.

Ease of Use: 100% of users found the platform easy to use and navigate. However, some users disliked the lightning update.

Customization: 100% of relevant reviews observed the platform offers endless customization opportunities.

Tracking: 100% of relevant reviews suggest it effectively tracks opportunities, leads, sales, clients, invoices, campaigns, contracts and more.

Reports and Dashboards: 70% of reviews on analytics found it provided a robust dashboard and reporting modules.

Organizational Efficiency: 100% of users who mentioned effectiveness found it helpful in improving efficiency within the organization.

Call 855-850-3850 for a free consultation

SalesForce Sales Cloud: Analyst Summary

Salesforce Sales Cloud is an end-to-end platform for businesses to efficiently manage sales and marketing workflows, including client communication, customer relationships, leads and pipelines. Users found it helpful in tracking key metrics and opportunities.

It supports integration with numerous platforms and different organizational departments such as marketing and commerce. Tableau's AI- and Machine learning-driven analytics enable comprehensive visibility, reporting and tracking.

However, many reviews noted that its price is on the higher side. The app can take a while to load, and it requires significant training to use the platform. Some users also found its UI outdated and complained that it had too many features that aren't always useful. It also lacks robust marketing automation functionality.
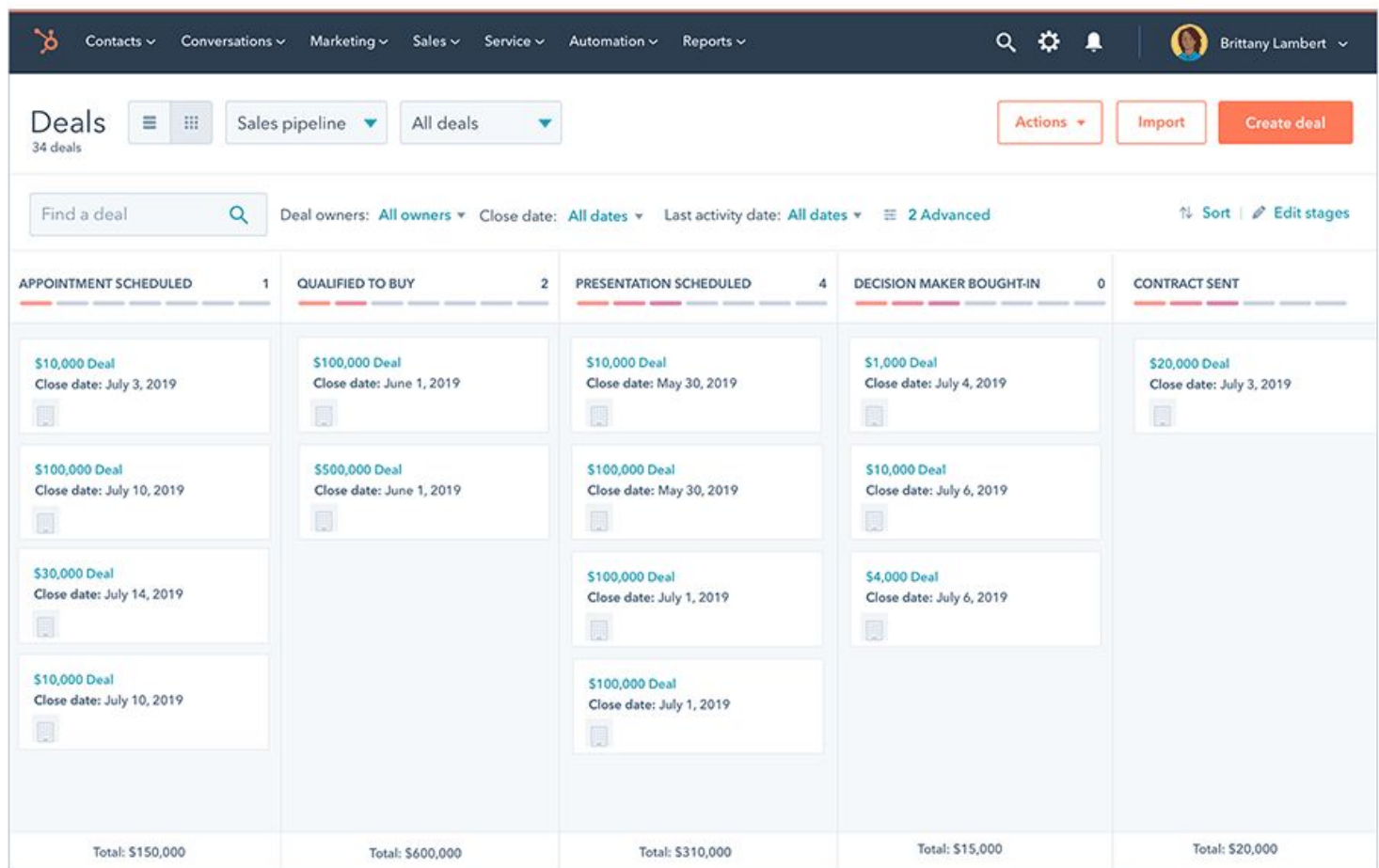
Overall, it's excellent for mid-sized or large companies with sufficient financial and technical resources looking for a user-friendly platform with robust analytics and lead and account management capabilities.

Call 855-850-3850 for a free consultation

HubSpot Sales Hub: Highlights

HubSpot Growth Platform: All three of Hubspot's hubs have been built on a single database. Deploy together to achieve an ecosystem that spans sales, marketing and service. Remove department silos, facilitate seamless data flow and enhance collaboration across teams.

Built-In Analytics: Track emails, offers, traffic, pages and more to determine which channels produce the most conversions.

Bulk Storage: Worried you might outgrow your CRM? With HubSpot CRM, you can rest easy, with the ability to store up to a million contact and company records.

Simplify deals and automate sales pipelines with Salesforce

Call 855-850-3850 for a free consultation

HubSpot Sales Hub: Highlights

Track Pipelines: Knowing where your sales pipeline stands at any given moment helps you optimize for the best results and gauge the overall health of your lead flow.

Contacts: The system captures data from forms and website activity and automatically inserts it into contact profiles, saving you time and reducing manual input errors.

- **List Segmentation:** Segment your contacts into different lists for more effective marketing and data organization.

Free Version: Provides a free forever edition that eases budget concerns for small businesses and has robust features for companies of all sizes.

Customer Filtering: Filter prospects into groups based on numerous filters and generate unique contact views for different teams.

AI-Based Email Scheduling: Stay connected with leads and customers with the right messages at the right time. Schedule email sequences and use machine learning to identify prospect engagement and deliver follow-up emails.

- **Mass Email:** Send customized and individual emails to campaign members and recipients on contact lists.

Custom Reports: Create customizable reports with charts and tables with a drag-and-drop interface.

HubSpot Sales Hub: Key Benefits

Improved Lead Identification: Identify prospects interested in your services and products, track visits in real time and follow up with personalized emails and reminders using scheduled delivery. Instant notifications for email opens, clicks and downloads help ensure quick responses.

Improved Lead Conversion: Close more deals using predictive lead scoring and prioritizing outreach based on winning potential. Use its live chat to connect to prospects in real time and book more meetings. Draft personalized pitches using playbooks, follow up with tailored proposals and collect payments with e-signatures.
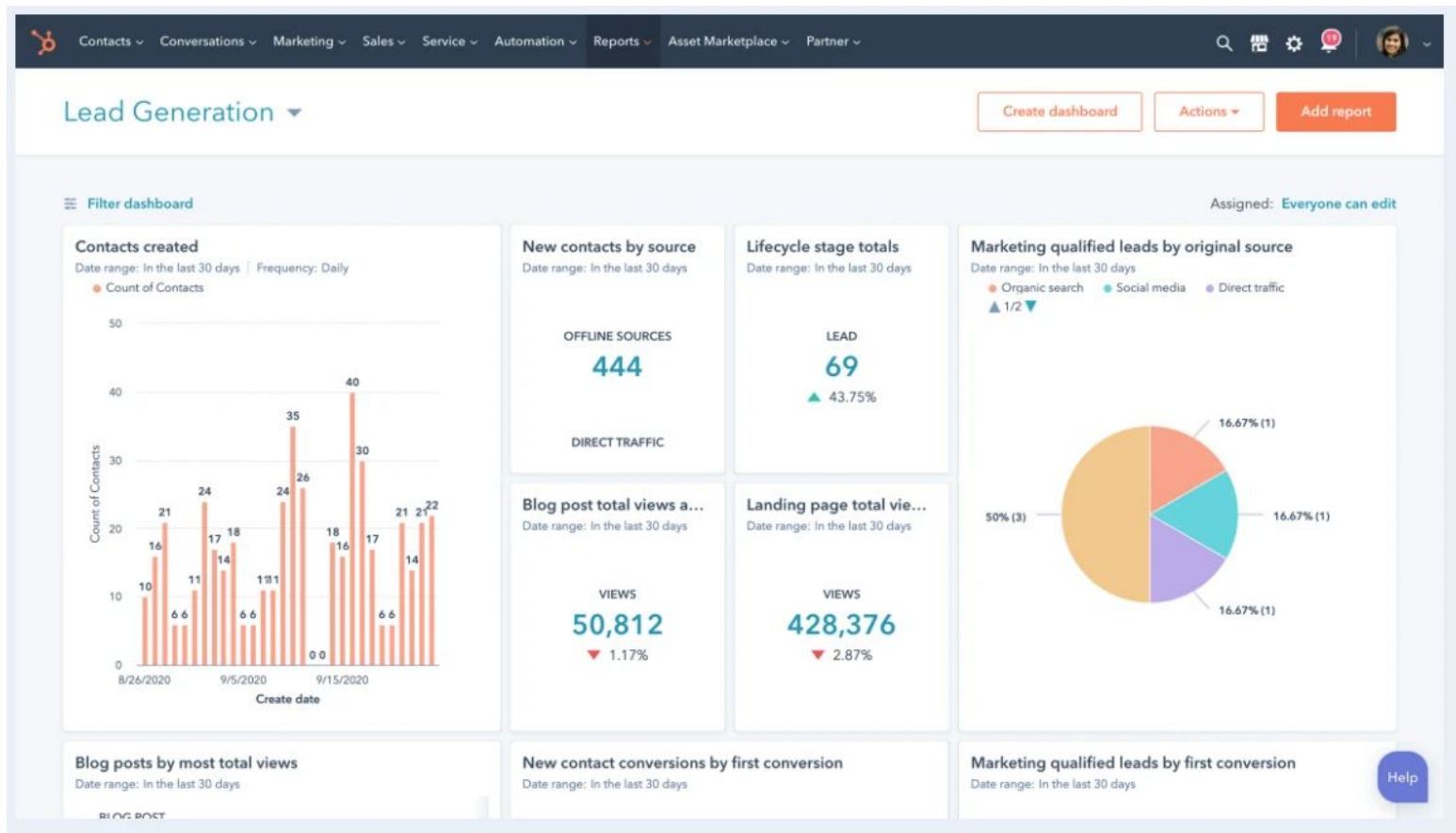
Hubspot´s lead generation dashboard

Call 855-850-3850 for a free consultation

HubSpot Sales Hub: Key Benefits

Efficiently Managed Pipelines: Set up and manage pipelines without expensive training or consultation. Create and track deals with ease and manage contact records, lifecycle stages and custom deal stages. Let users create and assign tasks or rotate leads with automated workflows.

Mobility: The software is available on mobile devices, allowing users to manage deals and tasks from any place and device. Keep up with leads while away from the desk.

Smooth Integration: The platform integrates with more than 230 apps, including Salesforce, Google Contacts, Pipedrive, Mailchimp, Outlook and Zoho CRM.

User-Friendly: An intuitive UI and no-code tools make it easy to leverage regardless of technical ability.

Full Scalability: Supports business growth at any stage by deploying the free toolsets and adding premium features along the way, all within a single ecosystem.

Salesforce Integration: Achieve a seamless marketing and sales strategy by setting up a two-way sync between HubSpot and Salesforce databases.

Free Website Insights: Optimize a website using a free website grader, determine strengths and weaknesses and get free improvement tips.

Prospect Journeys: Track prospects from the attraction phase of the buyer's journey to the closing stage for a high-level overview of lead sources to conversions.

HubSpot Sales Hub: User Review Summary

Strengths

Ease of Use: 100% of users found it user-friendly and easy to use.

Customer Support: 91% of reviewers found the support team reliable, noting that they offer quick responses to any need.

Automation: 95% of relevant reviews found it efficiently automates email campaigns, lead scoring and workflows.

Feature-Rich: 85% of users found it offers numerous useful functionality,

Interface: 80% of reviewers referencing the UI reported its slick interface makes it easy to navigate.

Weaknesses

Learning Curve: 85% of reviewers who talked about its learning curve found it challenging to perform complicated tasks like lead tracking and mailing list development.

Mobile Email Customization: 100% of relevant reviews noted that certain email configuration elements are glitched and presents several issues. (Although only mentioned by a few users)

Integration: 63% of reviews found that the platform lacks basic third-party integrations.

Mobile App: 50% of reviews about the app suggested it's inefficient and limited to monitoring the status of customer requests.

Call 855-850-3850 for a free consultation
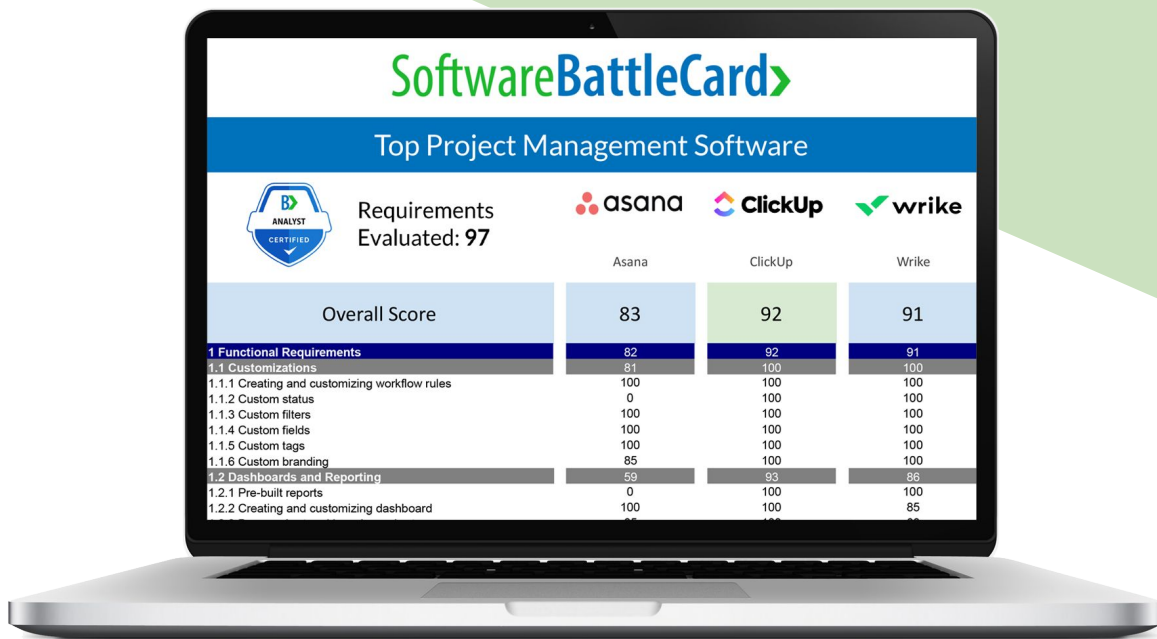
HubSpot Sales Hub: Analyst Summary

Users cited Hubspot's rich functionalities as a primary benefit, including basic CRM, marketing, sales, service and content management. Its slick interface ensures an intuitive experience, even while a few complicated functions take a while to learn. It offers extensive automation to simplify sales funnel management and social engagement tasks.

Users also appreciate its prompt customer support and its free version ideal for smaller businesses. There were mixed reviews on its price; while some users found it provides excellent value for money, others complained that its paid versions were expensive.

It offers intuitive templates to create email campaigns, landing pages, forms and more. However, customizing the mobile version of an email affects the desktop version and inserting custom HTML such as a "for promo" timer isn't possible. It also lacks robust mobile capabilities and third-party connectivity.

Overall, Hubspot stands out for its robust automation, navigability and end-to-end functionality. It's a good fit for businesses of all sizes, especially those focusing on inbound marketing, partners, leads and opportunities management.

Call 855-850-3850 for a free consultation

Create Your Own BattleCard

SoftwareBattleCard>

Top Project Management Software

ANALYST CERTIFIED	Requirements Evaluated: 97	asana Asana	ClickUp ClickUp	wrike Wrike
Overall Score		83	92	91
1 Functional Requirements		82	92	91
1.1 Customizations		81	100	100
1.1.1 Creating and customizing workflow rules		100	100	100
1.1.2 Custom status		0	100	100
1.1.3 Custom filters		100	100	100
1.1.4 Custom fields		100	100	100
1.1.5 Custom tags		100	100	100
1.1.6 Custom branding		85	100	100
1.2 Dashboards and Reporting		59	93	86
1.2.1 Pre-built reports		0	100	100
1.2.2 Creating and customizing dashboard		100	100	85

Top CRM Software Comparison

The BattleCard platform, powered by SelectHub, contains expert analysis for all key software criteria. This is compared against **vendor-supplied data** and **user ratings** to create our software scores—which allow us to provide you with highly accurate Software BattleCards based on your own requirements.

SoftwareBattleCard>

Call 855-850-3850 for a free consultation

Get Expert Assistance

Quick & easy access to the right information—Free!

Our advisors can tell you which products have the best features for your industry, company size and specific needs. Besides pricing comparisons, they can also provide you with free software demos and recommendations for services to help in in your selection project.

Schedule a Free Advisory Call

SoftwareBattleCard›

Call 855-850-3850 for a free consultation