

Which CRM Should an Early-Stage Company Choose?

Leadership / Sources

THE COMMERCIAL QUESTION

Which CRM will help your business sell and serve customers better, without costing more time and money than it returns?

THE ANSWER

For a small startup whose main need is straightforward sales management, start by testing Pipedrive. Its focused sales tools make it a sensible default. Choose another CRM when your customer relationships, connected teams, or operating requirements justify it. Let your own workflows and full costs decide.

What the evidence says

1. Your sales process and users determine which capabilities matter.
2. The full cost includes subscriptions, setup, administration, and change.
3. A trial with your own work is more useful than a polished demonstration.

ESTABLISHED EVIDENCE

Research links purposeful use of sales technology with better selling capabilities and performance; ownership alone is insufficient.^{1, 2}

ESTABLISHED THEORY

Sales-technology research proposes that performance gains arise through support for selling and relationship-building tasks.^{1, 2}

1. Start with your requirements

Begin with the work, not the product tour

The best CRM for another company can be the wrong CRM for yours. A founder selling a handful of complex projects, a team handling hundreds of inbound enquiries, and a business selling through distributors have different work to organise. Start there.

Write down what is difficult today. Perhaps follow-ups are missed. Perhaps customer history lives in individual inboxes. Perhaps marketing and sales cannot agree which enquiries become business. Perhaps the forecast is a weekly reconstruction exercise. A useful purchase solves a defined business problem.

Research on sales technology links its value to acceptance and purposeful use: how it supports knowledge, targeting, selling, and relationship-building.^{1, 2} That supports a practical selection principle. Evaluate the work people can accomplish with the system, rather than the length of its feature list. These studies do not establish that any particular vendor is best.

Define your requirements before you shortlist

Your situation	What to test
A few complex deals with several decision-makers	Account history, relationships, stakeholder records, and flexible opportunity detail.
Many short-cycle opportunities	Fast entry, clear ownership, reliable follow-up, and simple pipeline views.
Marketing generates much of your demand	Forms, campaigns, lead handover, attribution, and shared customer records.
Repeat orders, renewals, or subscriptions	Whether repeat business and renewals can be handled without awkward workarounds.
Partners or distributors influence the sale	How partners, end customers, and opportunities relate; who can see and update what.
Sellers spend time away from their desks	The actual mobile workflow, email/calendar connection, and ease of updating records.

Separate essentials from preferences. An essential is a requirement whose absence would make the system unsuitable. A preference makes a suitable system better. Keep that distinction visible: an attractive screen must not compensate for a missing requirement.

Involve the people who will enter the data and the people who will use it. Ask a seller to show how they prepare for a meeting. Ask a manager to show the decision they need a report to support. Ask the person handling customer handover what information is repeatedly missing.

2. Compare the options against your situation

A useful shortlist depends on your business

For a small startup with a conventional sales pipeline, Pipedrive is my preferred starting point. The reason is practical: its product is centred on organising leads, opportunities, and follow-up, with additional sales capabilities available as needs grow. That is a useful match when sales organisation is the problem you need to solve.³

This is a recommendation to test it first, not a finding that it will win every comparison. A company that needs closely connected marketing and sales may prefer HubSpot. A company with unusual customer relationships may prefer Attio. An existing Salesforce user may be better served by improving what it already has. Other products may deserve a place if your sector or budget calls for them.

Platform	Put it on your shortlist when...	Make it prove...
Pipedrive	The main job is organising sales opportunities and follow-up.	That your required reporting and adjacent processes work on an affordable plan.
Attio	Your customer relationships or records need a flexible structure.	That useful flexibility will not become an ongoing configuration burden.
HubSpot	Sales, marketing, and customer handovers need to work together.	That the combined benefit justifies the subscriptions and limits you actually need.
Salesforce	Your requirements, existing environment, or scale justify a configurable system.	That the chosen edition and administration effort are proportionate to your business.

Pipedrive: when the immediate problem is running sales

Pipedrive is worth testing when your main need is to organise leads, opportunities, ownership, and follow-up. Its published plans centre on pipeline management; higher plans add capabilities such as email synchronisation, automation, forecasting, and richer customisation.³

For your business, the attraction is a focused sales workspace. Test whether a seller can find the customer history, record the next action, and keep the opportunity current without unnecessary effort. Ask a manager to build the report they will actually use.

Look harder if you need marketing, service, delivery, or complex relationships to live in the same system. Establish whether the proposed combination of native features, add-ons, and connected

tools is still simpler and cheaper for you. Do not assume that the entry plan includes everything shown in a demonstration.

Attio: when the shape of your customer data matters

Attio deserves consideration when a conventional contact-and-deal structure does not comfortably describe your business. Its plans offer configurable records and relationships, with reporting and workflow capabilities that vary by tier.⁴

Use the trial to model a real account. Include the people, companies, partners, or other records your team needs to connect. Then ask another colleague to use that structure without its designer explaining every step.

Flexibility is useful when it makes your work easier. It becomes expensive when someone must continually redesign the system. Identify who will own the configuration, and check the required plan, usage allowances, and reporting limits. Choose it because the resulting workflow is better for your team, not because it offers more design possibilities.

HubSpot: when connected teams matter more than a standalone sales tool

HubSpot is worth testing when customer information must flow between marketing, sales, and other teams. Sales Hub provides sales tools within a wider customer platform, with capability and limits varying across subscriptions.⁵

Follow one of your actual enquiries from its source to a sales conversation and then to handover. Can everyone see what they need? Does the integration remove duplicate work or replace tools you currently pay for? If so, a wider platform may offer value that a sales-only comparison misses.

Price the configuration you will use. Distinguish an inexpensive starting tier from the reporting, automation, seats, and other products needed by the finished process. If your company simply needs a clear pipeline and dependable follow-up, ask whether that wider platform earns its cost.

Salesforce: when the requirements justify the system

Salesforce should be considered on the merits of the edition and configuration you need. Its small-business range includes Starter and Pro suites, with different levels of functionality and customisation.⁶ It is not one uniform enterprise product or one uniform price.

It may be a sensible choice when your company already uses it successfully, when required integrations favour it, or when your operating requirements justify more configuration. An early-stage company is not automatically too small for Salesforce; equally, ambition alone is not a reason to buy complexity.

Ask who will set it up, make routine changes, maintain permissions, and support users. Have the supplier demonstrate your essential tasks in the edition quoted. If the answer depends on additional products or specialist work, include those costs. A familiar brand is neither a reason to select it nor a reason to reject it.

3. Make the decision with evidence

Compare the cost of running it

Compare complete, usable configurations. A headline price per user is not the cost of a working CRM. The cheapest seat can become the more expensive system if it creates manual work or forces additional subscriptions.

Cost	Questions to settle
Subscription	Which edition, how many paid seats, which add-ons, and what commitment?
Usage	Which contact, automation, reporting, storage, or other limits could change the bill?
Implementation	Who cleans and imports the data, sets permissions, connects tools, and trains users?
Administration	Who maintains it, and how much time will routine changes consume?
Growth	What happens to the bill at your expected team size and usage next year?
Exit	What can you export, in what form, and what work would a future move require?

Obtain comparable quotes for today and for a realistic next-year scenario. Use the same currency, billing period, seat count, and assumptions. Include one-off costs and the internal time required. Check the live plan pages and written quote rather than relying on a remembered starting price.^{3–6}

Treat APIs and automation as requirements only where they solve a problem your company has. If you need the CRM to exchange data with accounting, support, or a specialist tool, test that connection. Ease of configuration for an outside provider is not, by itself, a benefit to your business.

Test two candidates with your own deals

Give each shortlisted system the same small sample of realistic work: several live opportunities, a few customer records, a follow-up, a report, and a handover. Use anonymised data if appropriate. Test the plan you intend to buy, not features temporarily unlocked during a trial.

- Ask a seller to prepare for a meeting, record its outcome, and set the next action.
- Ask a manager to answer a genuine business question from the data, without rebuilding it in a spreadsheet.
- Test an essential integration, including what happens when a record changes in either system.
- Make a routine change yourself: add a field, adjust a view, or alter a simple report.
- Check access permissions and export a representative set of records.
- Record friction, workarounds, support needs, and the complete quoted cost.

Score the evidence against priorities agreed beforehand. A practical scale is 0: cannot do it; 1: a difficult workaround; 2: works with manageable effort; 3: works well in the intended plan. Give important requirements more weight. An unmet essential should disqualify a candidate, regardless of its total score. This is a proposed decision aid, not a research-derived formula.

Do not migrate without a reason

If you already have a CRM, include improving the current setup as an option. A poorly configured system can look like a poor product. Establish whether simpler fields, cleaner data, better views, or a different subscription would resolve the actual problem.

Switch when the expected business benefit exceeds the disruption, migration work, and ongoing cost. If you are starting from scratch, keep the first configuration small enough to use well. Add complexity when experience demonstrates a need for it.

The decision should be explainable in one sentence: "We chose this system because it handles these essential jobs better for our people, at a cost we can sustain." If you cannot complete that sentence with evidence from the trial, you have not finished choosing.

4. Put your chosen system to work

Metrics Builder roadmap

Once you have chosen the CRM, a Metrics Builder can help turn your management decisions into a working setup. This is an optional implementation route. Its purpose is to reduce effort in the system you chose; it should not dictate the choice.

Step	What your company does	What must be established
1. Define	Choose the measures, definitions, and management actions you need.	Each measure answers a business question and has an owner.
2. Check	Confirm the selected CRM and subscription can support the design.	Data availability, reporting, permissions, integrations, and costs are understood.
3. Configure	Build the smallest useful set of fields, views, reports, and alerts.	Automatic setup is used where supported; remaining steps are explicit.
4. Pilot	Use the setup with a small group and real opportunities.	Sellers and managers can use it, and alerts lead to useful action.
5. Improve	Review what helps, remove noise, and expand only where useful.	Someone owns maintenance, and the ongoing effort remains worthwhile.

Where an alert identifies an issue, you can ask the seller what support would help before management responds. Use that workflow if it improves how your team works; it is a management choice, not a condition of selecting a CRM.

Treat this as a proposed roadmap, not a promise of automatic deployment. The extent of automation must be confirmed for your chosen platform, plan, and permissions. A guided setup can still be valuable if it gives your company a useful result at a sensible cost.

The Secret Sauce

SECRET SAUCE INGREDIENT

Start with Pipedrive for a straightforward sales operation. Choose differently when your business gives you a better reason.

Your priorities decide the shortlist. Your people test the work. Your costs decide what is sustainable. The right answer may be Pipedrive, Attio, HubSpot, Salesforce, another product, or improving the system you already have.

Sources

Product pages checked 14 September 2026. Capabilities and commercial terms vary by plan and region; confirm them in your own quotation. The selection framework and conditional recommendations are the author's judgement.

1. Michael Ahearne Douglas E Hughes and Niels Schillewaert. [Why Sales Reps Should Welcome Information Technology](#). International Journal of Research in Marketing 24 no 4 2007.
2. Gary K Hunter and William D Perreault Jr. [Making Sales Technology Effective](#). Journal of Marketing 71 no 1 2007.
3. [Pipedrive. Plans and pricing.](#)
4. [Attio. Plans and pricing.](#)
5. [HubSpot. Sales Hub capabilities and plans.](#)
6. [Salesforce. Small-business plans and pricing.](#)