

## The Top 8 Free CRM Systems – Part 1

While many CRM systems can easily cost you thousands of dollars per year for every user, you might be surprised to learn that quite a variety of free CRM systems are also available. The question of whether the top free CRM solutions can handle your needs depends on what, exactly, you need to accomplish.

For the sake of clarity, this article will feature only CRM systems that offer at least some useful functionality absolutely free, without any time limit. Some of these packages limit the number of users (typically to 15 or fewer), but offer some type of data storage and at least basic contact management features, while reserving more advanced tools for their paid editions. Free CRM platforms also tend to be limited in terms of customer support, which means you'll largely be configuring and learning the software on your own.

But for all those limitations, there are some genuinely powerful free to use CRM software on the market right now. In Part 1 of this two-part series, we'll be featuring the first four of our top eight favorites – in no particular order, because, as mentioned above, the best CRM app for you will depend on what you need to achieve.

That said, let's dive into the details. Here are the pros and cons of four of the top CRM solutions that provide at least some of their essential features for free.



## 1. Bitrix24

The main reason Bitrix ranks among our recommended free CRM software is that it offers all its core functionality completely free, for up to 12 users per plan. That core functionality includes powerful tools for collaboration, contact management and scheduling, which makes it well suited for small to mid-sized teams who need a solid CRM solution to get their business up and running.

In terms of essential CRM tools, Bitrix offers robust marketing automation, from drip email campaigns to planned sales funnels. All that functionality is controlled from a central CRM dashboard. Bitrix's telephony suite makes it easy to record conversations, set up automatic dialing, and track the sources of calls. In other words, Bitrix is all about putting enterprise-level communication and collaboration tools in the hands of your salespeople.

On the internal side, you'll get an invoicing system, along with dashboards for logging hours, generating work reports, and keeping employee records, documents and projects organized. And for collaboration, Bitrix provides a built-in instant messenger, centralized document collaboration tools, and even a video chat app.

Bitrix's free plan throws in 5 GB of storage, as well as the ability to store up to 100 recorded phone calls at a time. As mentioned, the number of users is unlimited, and Bitrix even offers collaboration for external users, through an interface you can brand with your own company logo. And when you're on the go, Bitrix's free plan also includes a full-featured mobile app.

# Bitrix24

In short, Bitrix lets everyone from salespeople to managers to HR reps handle their tasks from within the same interface, which keeps all your data in one place. That can help solve the common “siloeing” problem, in which each department keeps its own data in its own incompatible format, and can’t integrate it with other departments’ data when multiple teams need to collaborate. Bitrix’s inter-departmental streamlining can be a major help for a growing business.

And when you find you need more storage space, Bitrix will let you upgrade to 24 GB and up to 24 users for \$39 per month, or up to 100 GB and unlimited users for \$99 per month. Compared with the costs of many leading CRM software platforms, even Bitrix’s unlimited plan is priced very competitively.

The main downside of all this is that Bitrix doesn’t offer much in the way of customization or expansion. If you want integrations with additional apps and platforms, you’re going to have to look elsewhere – and that limitation can create serious headaches when it’s suddenly time to migrate all your data to a more full-featured platform.

**Scott Spacey** Edit  
Creative Director at Home Style

773-338-7786  
847 North Rush Street  
Chicago  
IL  
65629  
[show on map](#) | [get directions](#)  
[attach address to organization](#)

**About** Edit  
Had several meetings with scott, he's very motivated to bring Home Style to a modern online presence.

- Tasks** + Add
- Call** Discuss website proposal (Dom Briggs)  
Mon, Oct 17, 2:00pm
  - Milestone** Sign off design (Dom Briggs)  
Fri, Oct 21
  - Meeting** Meet up for lunch (Tom Ford)  
Mon, Jun 3

LAST CONTACT	PIPELINE VALUE	CASES
Today	\$4,297.60 on \$42,976 total	None

**History** Add a Note

- Completed by Dom Briggs a few seconds ago  
[Meeting] Initial meeting
- Email via Tom Ford on 3 Jun  
**Scott Spacey to Tom Ford**  
**New e-commerce site**  
Hi Tom,  
  
I wanted to follow up on our phone call last month. I'm looking to replace our existing ecommerce site for homestyleshop.co.  
As well as a refresh of the design we'd like the site to handle multiple languages so that we can sell internationally. Our budget for this project is \$10,000....  
[view entire note](#)

feedback



## 2. Capsule CRM

If you're just getting started with CRM, and need an easy-to-use platform that'll get you up and running as quickly as possible, then Capsule may be exactly what you're looking for. This software covers the bases on essential functionality – and while the free plan doesn't offer much beyond customer management and task planning, it does come with dedicated tech support, along with an interface that'll make you feel right at home.

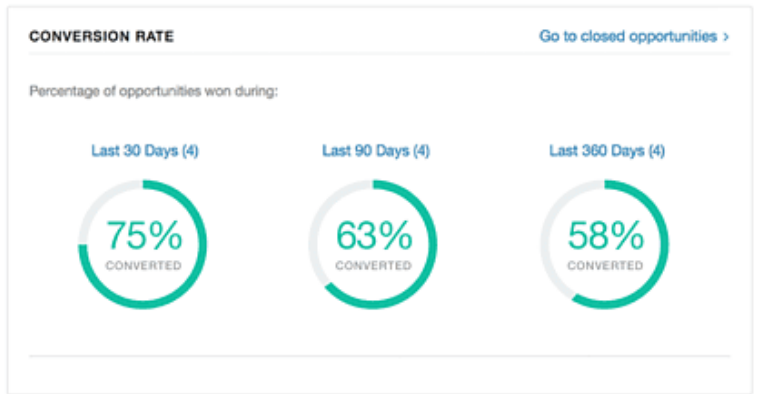
Right from the moment you sign up, Capsule makes a point of being easy to use. Instead of immediately drowning you in lists of options, as many CRM platforms do, Capsule just gives you a simple three-column interface: customer details on the left, emails and opportunities in the middle, and your task list on the right. That's all there is to it.

And we really do mean, "that's all there is" – in the free plan, at least. You'll get access for two users, along with 10 MB (megabytes, not gigabytes) of storage, up to 250 contacts, and unlimited cases, plus a basic set of social media integrations. This means you'll be able to keep all your emails and social media interactions in one place, attach documents to cases, tag contacts and organize them into lists, set up a sales pipeline for each lead, and add appointments to your calendar.

Sales Pipeline

Add Opportunity

Dashboard List



### UPCOMING TASKS FOR OPPORTUNITIES

OVERDUE 2

Beyond that, you're going to have to shell out at least \$12 per user per month for the Professional plan, which will get you 2 GB of storage per user, up to 50,000 contacts, and integrations with a wider range of platforms, including MailChimp, FreshBooks and Google Apps – along with handy features like email tracking, VoIP calling, job and time tracking, accounting, and proposal generation.

That's not to say, though, that Capsule's free plan is too limited to be of any use. We'd highly recommend it for solo entrepreneurs and independent salespeople – especially those who need a free CRM app that "just works" out of the box, and don't need to set up any marketing automation.

If you just want a platform that'll keep your customer interactions on target, and won't ever frustrate you with a bunch of unnecessary options, then Capsule may have your basic needs covered.

### YOUR TASKS Add Task

OVERDUE 1

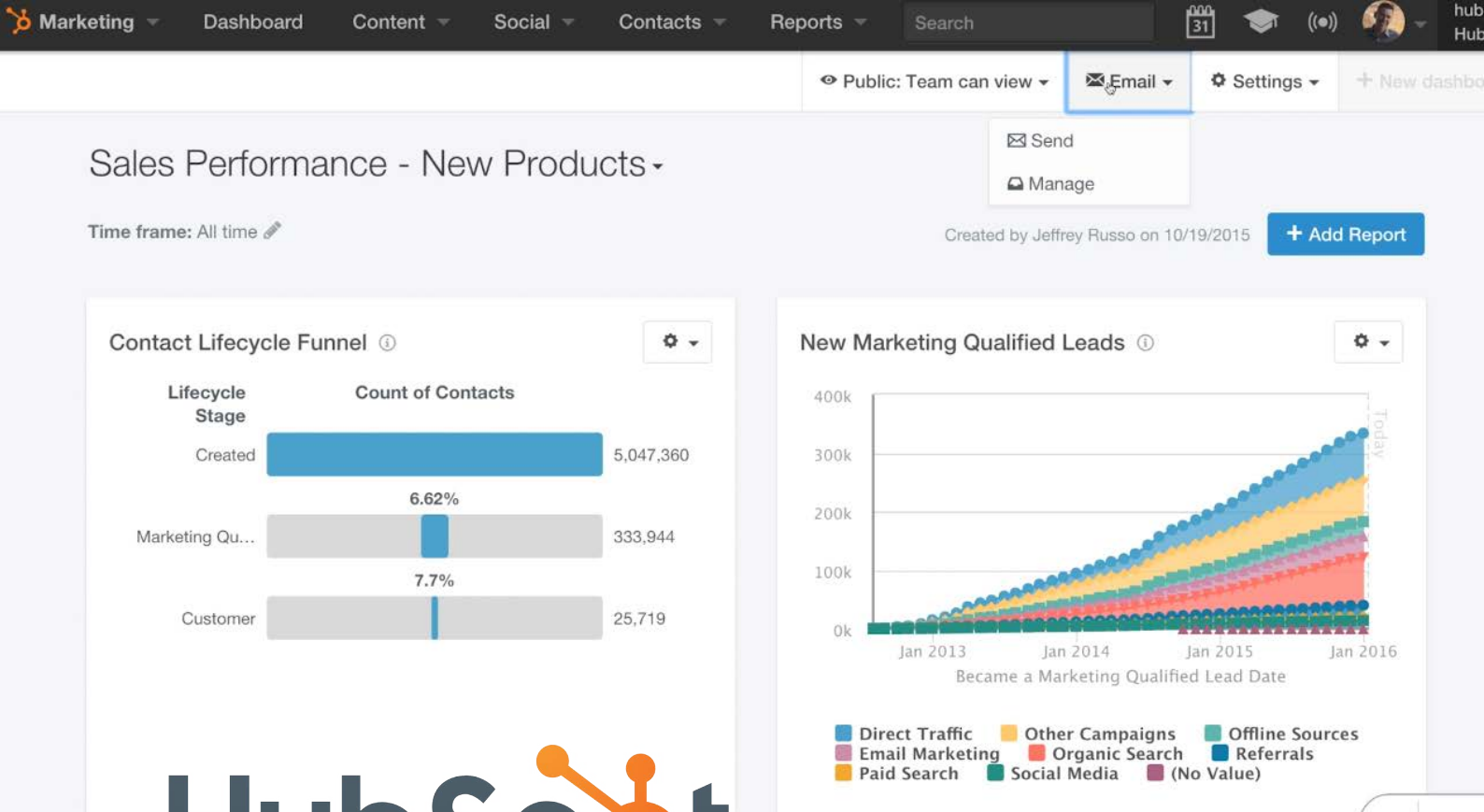
- Deadline** Advert release date  
Tue, March 10 2016 for Bookingly

NEXT 7 DAYS 4

- Call** Photographer to send high res shots  
Tue, March 14 2016 for James Allen
- Call** Confirm production details  
Tue, March 14 2016 for Khann Warsame
- Meeting** Finalize distribution channels plan  
Tue, March 16 2016 for Jennifer Kim
- Email** Discuss contract budget terms

### LATEST UPDATES Show: All by Everyone

- Danielle Henders** completed a task re: **Jennifer Kim**  
Call to finalize document details  
Thu, March 14 1 hour ago
- Danielle Henders** added a note re: **Bookingly**  
Met up with the team at their office.  
Had a good discussion about the requirements - see attached file for more details.  
[bookingly-requirements.pdf](#)  
Thu, March 13 23 hours ago
- Scott Spacey** added an email re: **Khann Warsame**  
Free for a call  
Hi Khann,  
Thu, March 11 2 days ago



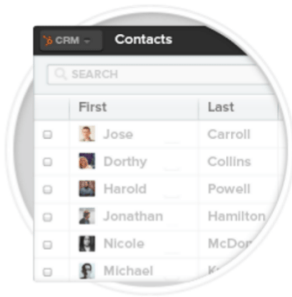
### 3. HubSpot

It'd be hard to find a list of free CRM software on which HubSpot doesn't show up – and that's for good reason. This platform has built its reputation on providing a full suite of CRM functionality for free, within a user-friendly interface. And while you'll need to pay extra for tools like email marketing, social media integration and marketing analytics, HubSpot's contact management features can still handle most of the CRM needs of a small or mid-sized business.

HubSpot provides unlimited storage for up to 1,000,000 users and contacts – including all customer your documentation and profiles, sales pipelines, deals, scheduling, and even phone integration. That platform makes it easy to import your customer database from many other platforms, and quickly populate Hubspot's dashboard with all your emails, calls, and social media interactions.

This platform's intuitive timeline view also stands out in a world of cluttered CRM dashboards. Instead of a complex system of inboxes and tasks, HubSpot organizes all interactions with each lead into a simple pipeline. From that central control panel, you can click on individual interactions to bring up details of those emails, social media conversations, and phone calls. You can also tag leads and group them into lists, then browse and sort them by specific attributes. For companies handling thousands of leads and clients, the ability to quickly put interactions in context can make it much easier for your salespeople to build personal connections with potential customers.

Say goodbye to the manual tasks and confusing features of most customer relationship management systems. Say hello to HubSpot CRM.



Track contacts, companies, deals & tasks



See useful details about your prospects



Monitor your team's progress



But while HubSpot delivers all this functionality for free, you're going to have to look elsewhere if you want to go beyond it. The limits of the free plan may prove frustrating when you need to generate in-depth reports (the free plan only offers basic reporting), or when you're ready to set up automated email campaigns, or to use your existing customer database to predict and discover new audience segments.

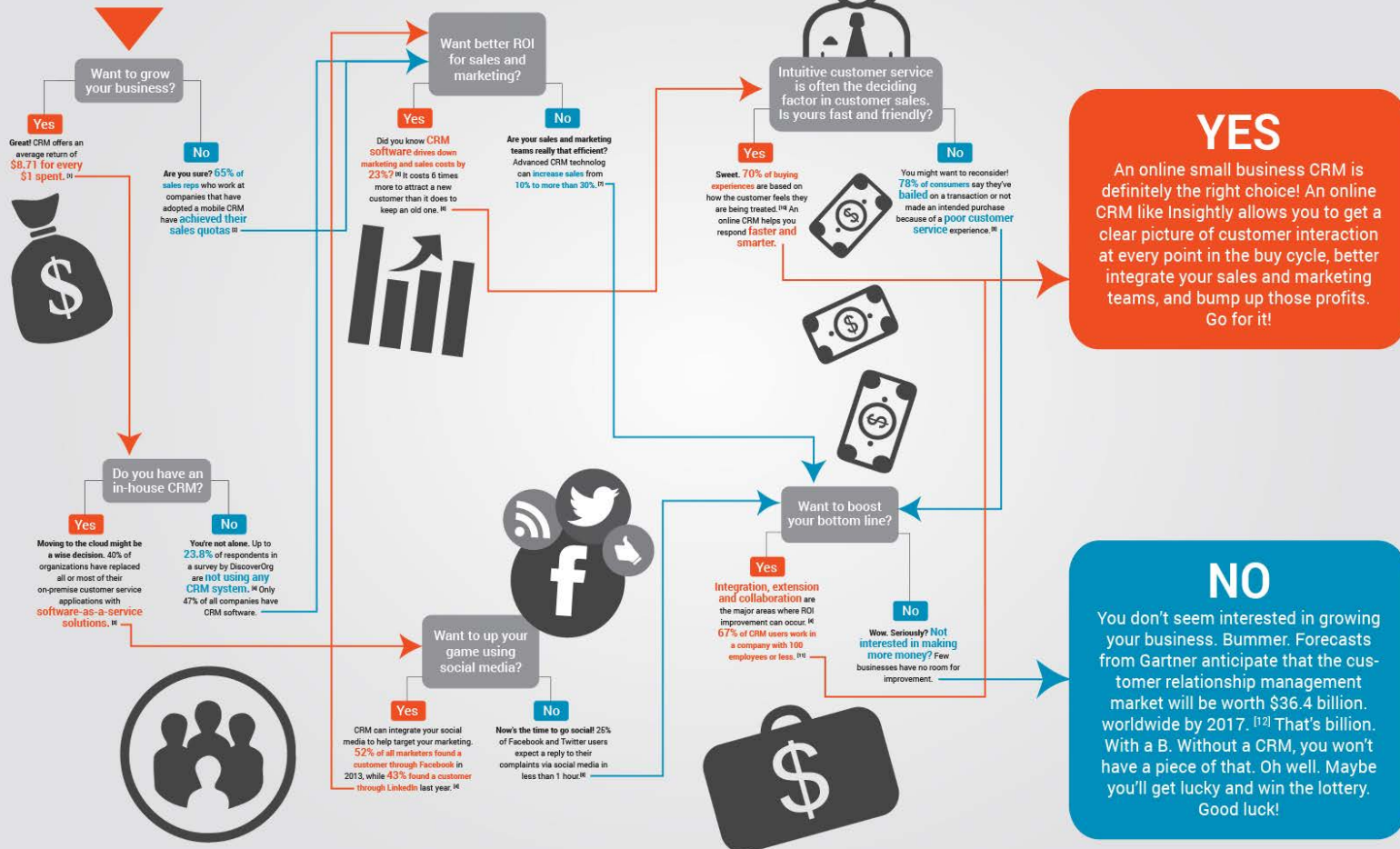
For features like those, you're going to have to upgrade to one of HubSpot's paid plans. The Basic plan starts at \$200 a month, and includes content creation tools and marketing analytics; while the \$800-a-month Pro plan provides marketing automation, attribution modeling and custom workflows; and the \$2,400-a-month Enterprise plan will get you predictive lead scoring, revenue reporting, event-based segmentation, and many other advanced features.

The bottom line, though, is that for a growing business that's highly focused on cultivating leads, HubSpot is tough to beat in the world of free CRM software. It's full-featured, easy to learn, and relatively generous in the amount of storage and user access it offers without charging a penny.

The screenshot shows the HubSpot CRM Sales Dashboard. At the top, there's a navigation bar with tabs for Sales, Dashboard, Contacts, Companies, Deals, Tasks, Sales Content, and Settings. The user is logged in as Matt Guay. The main content area is titled 'Sales Dashboard' and features a 'Deal Forecast' widget with a bar chart showing progress towards a \$100,000,000 quota. The weighted total is \$60,000,000. Below the chart, there are three progress indicators: 'DECISION MAKER BOUGHT IN' at 80%, 'PRESENTATION SCHEDULED' at 60%, and 'APPOINTMENT SCHEDULED' at 20%. A table titled 'Appointment Scheduled' shows one deal: 'Hovercraft Development' with a close date of 05/31/2015, owned by Matt Guay, for an amount of \$50,000,000, related to Google. On the right, there's a 'RECENT ACTIVITY' section with three items: 'You created a meeting', 'You created a note', and 'You created a task'. A 'GUIDE' button is visible in the bottom right corner.

# Should Your Small Business Use an Online CRM?

insightly



## 4. Insightly

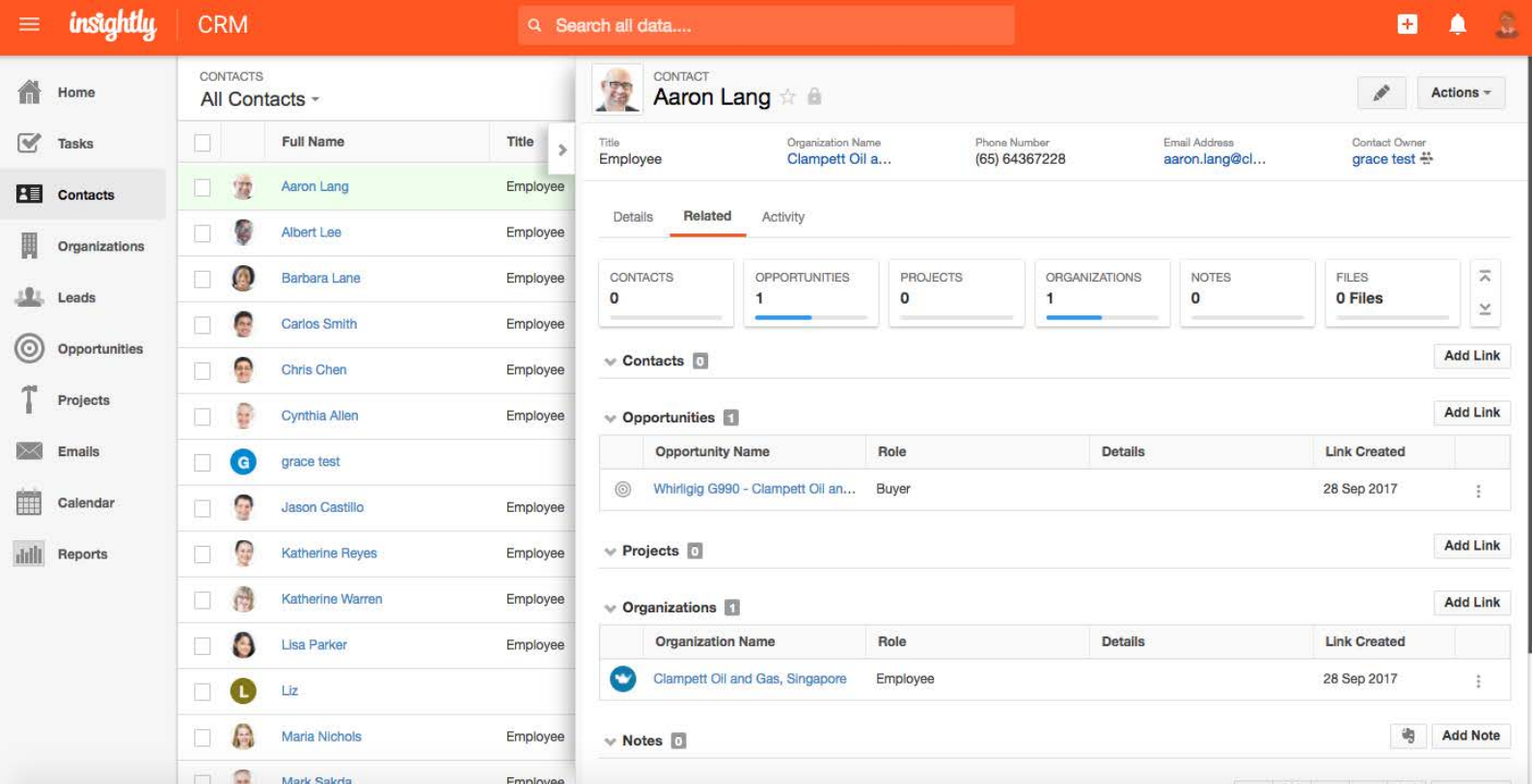
Like HubSpot, Insightly delivers a fairly complete range of basic CRM features, absolutely free. One big difference, though, is that while HubSpot requires a big jump in pricing in order to give you access to more powerful features, Insightly will allow you to upgrade just a few features at a time, as your budget permits, for more moderate monthly fees.

At its core, Insightly provides a CRM system focused on project management. From one centralized control panel, you can easily access lists of tasks, contacts, emails, and so on. Within that dashboard, you'll get tools for collecting leads, tracking sales pipelines, administering deals, and sending out mass emails.

The downside of all this is that Insightly's free plan limits you to just two users, 200 MB of storage, 2,500 records, five email templates, and only 10 mass emails per day. The free plan doesn't give you access to Insightly's mobile app (which is actually pretty powerful), and you'll only be able to import 500 rows of data entries – so if your lead database is already larger than that, you may be better off looking for another platform.

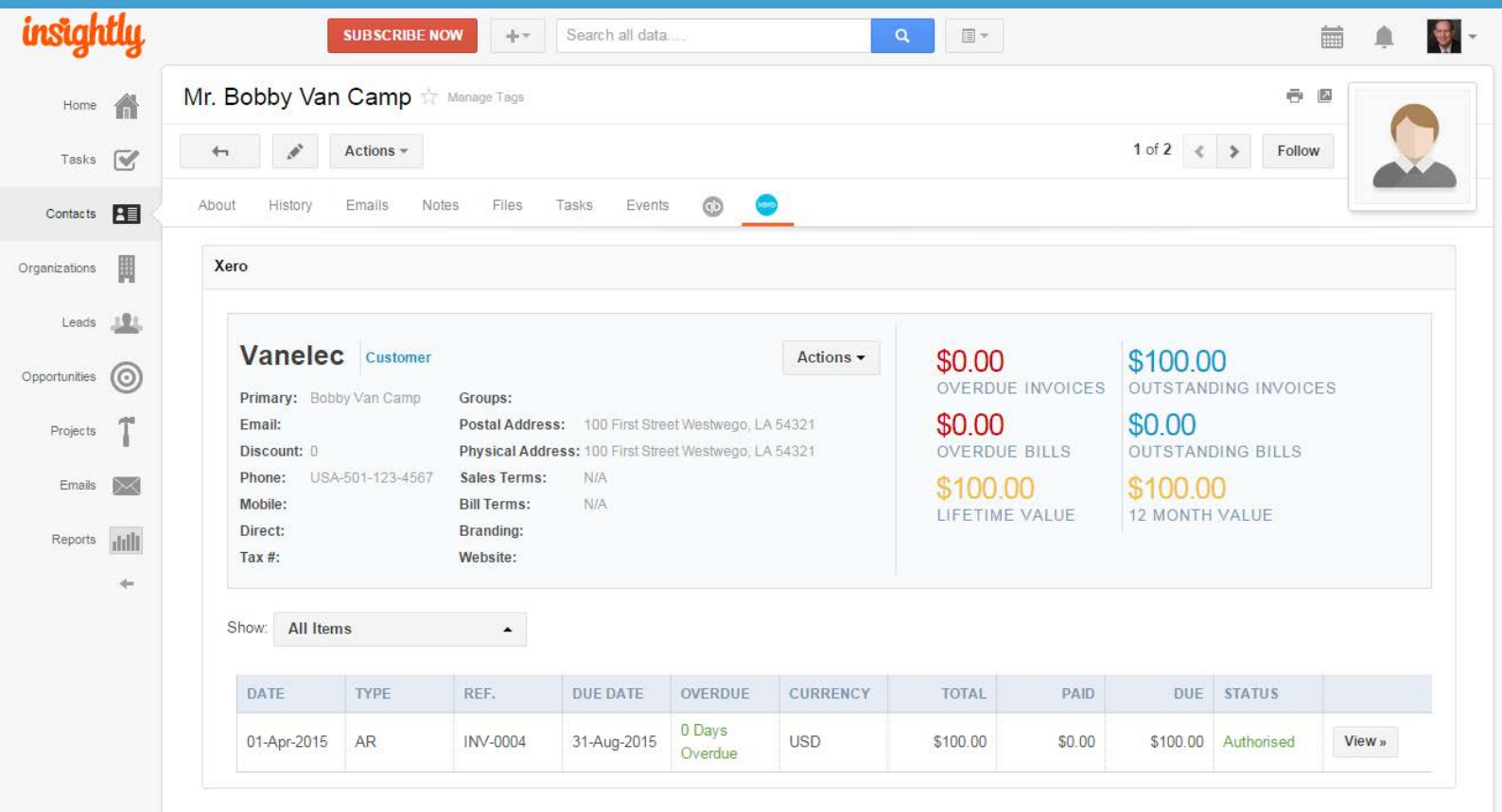
Above and beyond the basics, Insightly offers more advanced features on a reasonable a-la-carte basis. For example, you can add audience segmentation and project management tools with the Plus plan for \$29 a month, workflow automation and





MailChimp integration with the Professional plan for \$49 a month, or a full list of high-powered features with the Enterprise plan for \$99 a month. This ability to upgrade as your business grows can help Insightly adapt to your changing needs without breaking the bank.

Insightly's free version is limited in many ways; there's no doubt about that. But for entrepreneurs just starting out, though, this platform offers all the basic features necessary to cultivate leads, from an interface that's versatile and easy to get used to.



## Conclusion

Each of these free CRM platforms has its own pros and cons. Bitrix24 comes with an impressive list of collaboration tools, but can't be tweaked or expanded beyond the basics. CapsuleCRM is strikingly easy to use, but its free plan offers very little in the way of advanced features. HubSpot provides a broad range of lead cultivation tools, along with quite a bit of storage; but upgrades can quickly get pricey. And while Insightly offers a solid set of essentials, along with reasonably priced upgrades, its free version can be restrictive in terms of data importation and storage.

All four of these platforms deserve to be considered top free CRM solutions – but the right choice for your business depends entirely on your needs in terms of simplicity, user-friendliness, multi-user collaboration, storage, marketing automation, and third-party integrations. In any case, it's worth comparing the pros and cons up front, before you start entering your data into any platform – because once you've invested time in your CRM software, it'll be even more time-consuming to export all that data and bring it into a different app.

And keep in mind, these are just four of the top eight free to use CRM software platforms. Stay tuned for Part 2, in which we'll break down four more of the most popular free CRM solutions on the market. See you there!

