

Comparing CRM Platforms – A Compact Guide

HubSpot CRM vs Microsoft Dynamics 365 & Salesforce

Hubit Oy 2024

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Provided and assembled by Hubit Oy 2024.
Sources include HubSpot, Forbes, G2Crowd, Microsoft and Salesforce.

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“Customer relationship management (CRM) software has redefined how we do business. It takes detailed data-tracking out of the hands of humans, so salespeople and customer service agents have more time to focus on human-to-human interactions.”

https://www.forbes.com/advisor/business/software/salesforce-vs-microsoft-dynamics/

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Part 1

What's a CRM in 2025?

- CRM is an acronym for customer relationship management. It's a technology used by any kind of business or organization, large or small, to manage and support customer relationships.
- In the past, a CRM was just a simple database that stored customer information. Now, it's an intelligent, proactive, AI-powered platform that empowers employees with the information they need to make the best decisions for every customer.
- Today, a CRM is not solely for sales, but a platform for your entire business. It helps align teams and acts as the foundation for customer experience management.

Source: https://www.salesforce.com/crm/ & Hubit

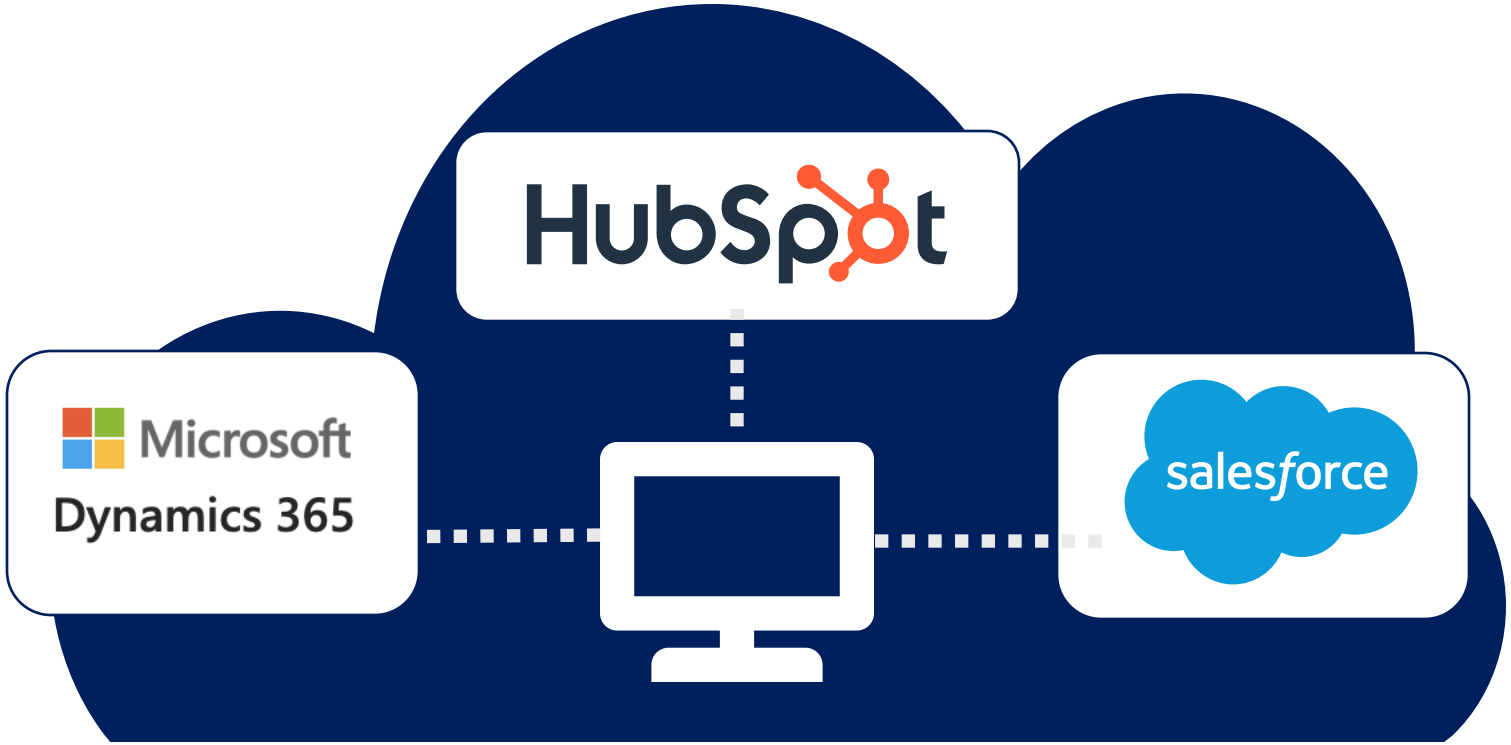


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Part 1

Comparing CRM Systems – A Difficult Task!

Comparing CRM platforms is not easy. Each applies its terms and is packaged a little differently. An object in one platform is called something else in another. Furthermore, CRM platforms have their own tiers, varying features that are either included in the license price or need to be purchase separately etc.



When comparing platforms, ask yourself:

- What is the Total Cost of Ownership?
- How easy is onboarding?
- How easy is platform customisation?
- How well does it scale with our needs?
- Does it integrate easily, and does it have an app ecosystem?
- Are AI and automation included, or paid for separately?
- Can our organisation operate it independently?
- Will users feel it's easy and intuitive to use?

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The Big Picture: Comparing Platforms

	Microsoft	salesforce	HubSpot	
Platform Structure / Design	Microsoft has a dated interface that's challenging to learn and implement. Like Salesforce, it has been cobbled together from different tools.	Cobbled together. Variety of hard-to-use legacy products that you pay to integrate. Excellent app ecosystem with native integrations.	Seamlessly integrated platform built on a shared customer record. Excellent app ecosystem with native integrations.	
Total Cost of Ownership	**VERY HIGH €€€€€** • Lots of Add-ons. Core plans include less and add-ons rack up €€€ quickly. • Microsoft Dynamics requires expert admins and charges extra for premium support.	**HIGH: €€€€** • Lots of add-ons. Core plans include less and add-ons rack up costs quickly. • In-house support is limited, expert admins & developers needed.	**MEDIUM: €€€** • Easier to learn and use with better-rated support included with Pro & Enterprise licenses • Lower total cost of ownership and transparent pricing	
Time to Value	Microsoft Dynamics can take up to 6 months to implement.	Like Dynamics, onboarding and implementation is lengthy and requires specialists.	HubSpot provides faster onboarding & adoption: typically 1-3 months.	
Perfect for:	Dynamics 365 scales well for Enterprise companies who need to combine a high level of customisation with complicated reporting and data needs. Companies with in-house or external tech support resources.	Salesforce is best for large or scaling businesses and sales teams that need a very customisable solution. Companies with in-house or external tech support resources.	Designed for the user, HubSpot is excellent for small to medium-sized companies and/or Enterprise companies looking to simplify their tech stack.	

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Part 1

The Big Picture: Comparing CRM Sales Platforms

	Salesforce Sales Cloud	MS Dynamics Sales	HubSpot Sales Hub	Other
Starting Price for CRM Sales (example) (all platforms offer “free” version also)	Starting 25€ / user per month to Einstein 1 Sales at 500USD / user per month + add-ons	Starting 60€ / user per month to Dynamics 365 Sales Premium at 126€ / user per month + add-ons	Starting 15€ / user per month to Enterprise Hub at 150€ / user per month	https://www.microsoft.com/fi-fi/dynamics-365/products/sales/pricing#comparison-table https://www.salesforce.com/sales/pricing/ https://www.hubspot.com/pricing/
Ease of Use	Difficult	Difficult	Easy	https://www.forbes.com/advisor/business/software/salesforce-vs-microsoft-dynamics/ https://www.crazyegg.com/blog/hubspot-crm-review
AI-powered CRM and sales automation	YES	YES	YES	
E-commerce integrations	As an add-on or through third-party plugins	As an add-on	YES: Built-in and with Market Place integrations to all major vendors	https://www.forbes.com/advisor/business/software/salesforce-vs-microsoft-dynamics/ https://www.hubspot.com/products/get-started
Account-Based Marketing	YES. To fully utilise requires Marketing Cloud Account Engagement (Pardot).	NO. For extra charge in Enterprise.	YES. Target Accounts is available in Pro & Enterprise (Sales Hub). To fully utilise for marketing requires Marketing Hub.	https://www.salesforce.com/marketing/account-based-marketing-guide/ https://www.hubspot.com/products/abm-software
Marketing Automation & AI-powered marketing	NO: Requires Marketing Cloud Account Engagement Corporate starting at 4200€ / month per organisation		NO: Requires Marketing Hub Pro starting at 792€ / month: AI Content Assistant, AI Campaign Assistant, AI Gen for Content, Content Remix	https://www.salesforce.com/eu/marketing/engagement/pricing/ https://www.hubspot.com/pricing/marketing/enterprise?term=annual



Part 2

Evaluating CRM platforms

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Part 2

How to evaluate CRM Platforms?

- **Evaluate needs:** Implementing CRM software includes analysing different aspects of the business, capital, stakeholders, teams, business objectives and even culture.
- **Assess CRM features:** Check for factors like customization, scalability, adaptability, user satisfaction, ease of budget, ease of admin, and market presence with the G2 platform of the software vendor. Analyse the user interface, integrations, add-ons, editors and studios, and other aspects of the software for a smooth sailing process.
- **Educate & commit key stakeholders**: Ensure key stakeholders, like the managers, team leaders, CEO, and project engineering teams, are informed of the launch. All of these stakeholders need to be aware of the benefits and technicalities of a CRM.
- **Execute CRM implementation & Onboarding:** The CRM implementation process can be divided into five major stages: module activation, data migration, integration and customization, user training and testing, and pilot implementation.
- **Customization:** The new software package needs to be customized to the business infrastructure. This includes configuring fields, workflows, and paths. The system must then be plugged into other tools and systems and customized per the lead database.
- **Performance updates:** Regular performance updates and service maintenance are crucial for the lucid functioning of CRM software. Be at par with service checks and performance upgrades to ensure the system doesn't glitch.
- **Platform Usage & Satisfaction:** Make sure the platform supports usage and has FIT with your type of organisation, it's level of know-how (now and in the future) as well as motivation to commit to working according to platform parameters.
- **Understand the Product Landscape**: HubSpot, for example, has customer facing team "hubs" like sales, marketing and services that align around a single source of truth, the actual CRM. An Application Ecosystem then provides needed third party applications like ERP or CPQ –software.

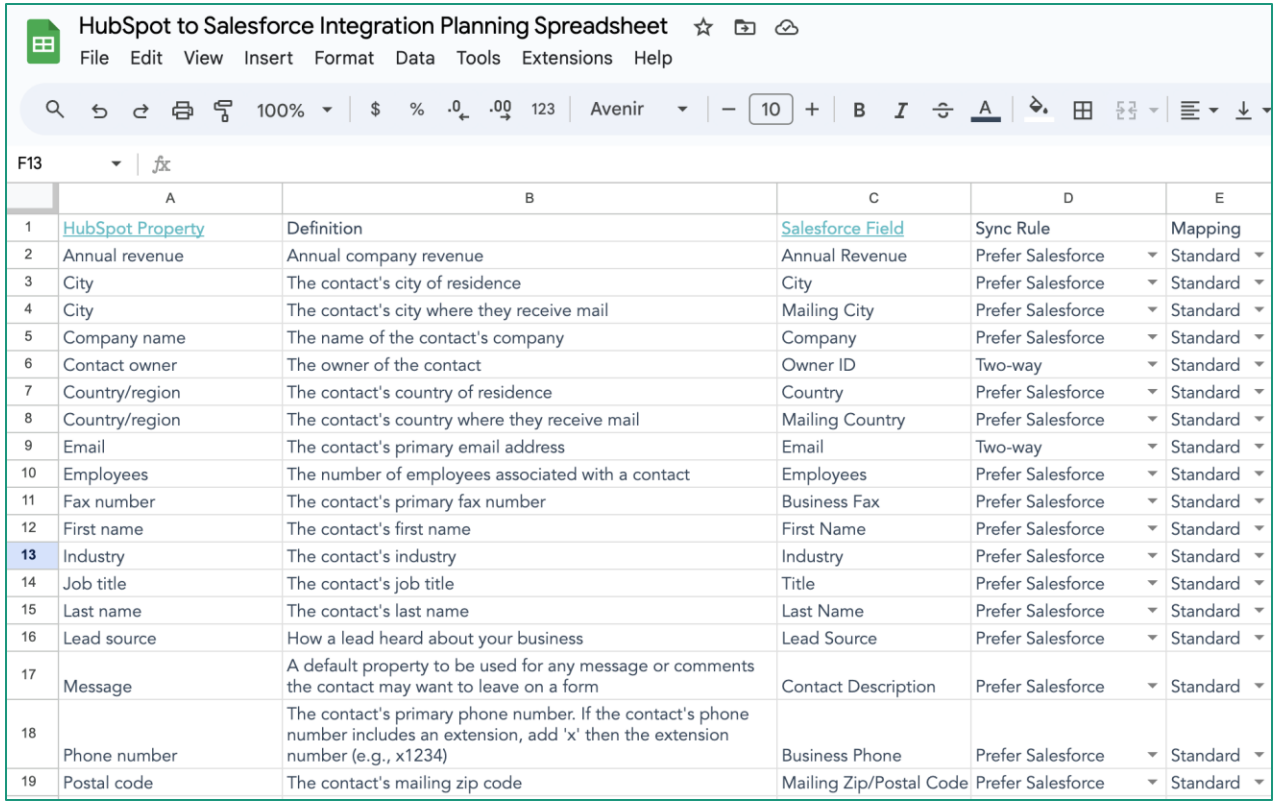
Source: Adapted from Blue Bowen / https://www.g2.com/categories/crm?utf8=%E2%9C%93&selected_view=grid&segment=all&attributes%5B15%5D=all#grid

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Part 2

Tip: Moving from Salesforce to HubSpot? Work with an Accredited HubSpot Integration Partner.

- Experienced CRM partners have best practice methods and have a proven process for migrations and platform integrations.
- In addition to the technical side, partners like Hubit understand the human element and can help craft *the right way of working* and help manage change in the organisation.



HubSpot to Salesforce Integration Planning Spreadsheet

File Edit View Insert Format Data Tools Extensions Help

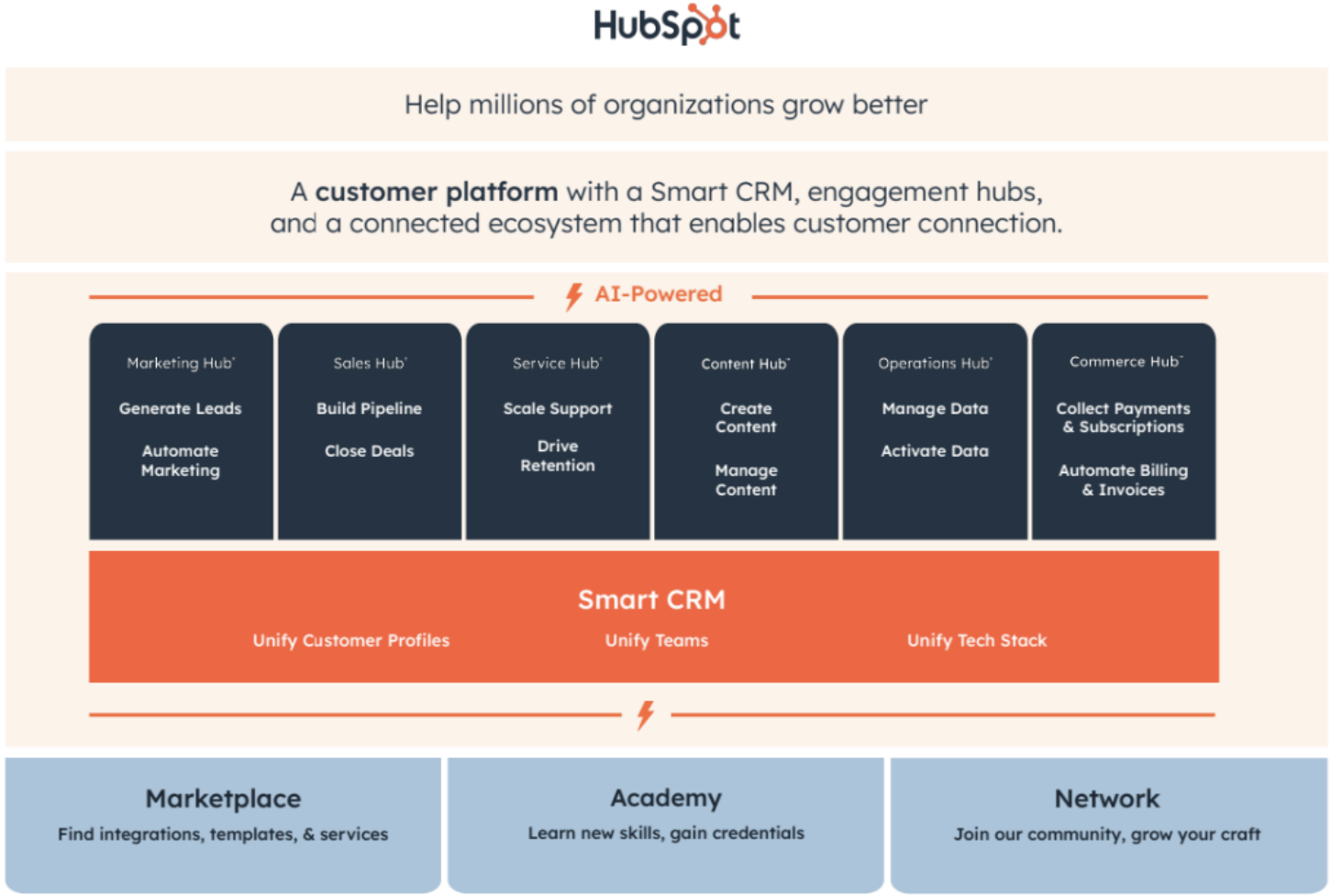
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	A	B	C	D	E
1	HubSpot Property	Definition	Salesforce Field	Sync Rule	Mapping
2	Annual revenue	Annual company revenue	Annual Revenue	Prefer Salesforce	Standard
3	City	The contact's city of residence	City	Prefer Salesforce	Standard
4	City	The contact's city where they receive mail	Mailing City	Prefer Salesforce	Standard
5	Company name	The name of the contact's company	Company	Prefer Salesforce	Standard
6	Contact owner	The owner of the contact	Owner ID	Two-way	Standard
7	Country/region	The contact's country of residence	Country	Prefer Salesforce	Standard
8	Country/region	The contact's country where they receive mail	Mailing Country	Prefer Salesforce	Standard
9	Email	The contact's primary email address	Email	Two-way	Standard
10	Employees	The number of employees associated with a contact	Employees	Prefer Salesforce	Standard
11	Fax number	The contact's primary fax number	Business Fax	Prefer Salesforce	Standard
12	First name	The contact's first name	First Name	Prefer Salesforce	Standard
13	Industry	The contact's industry	Industry	Prefer Salesforce	Standard
14	Job title	The contact's job title	Title	Prefer Salesforce	Standard
15	Last name	The contact's last name	Last Name	Prefer Salesforce	Standard
16	Lead source	How a lead heard about your business	Lead Source	Prefer Salesforce	Standard
17	Message	A default property to be used for any message or comments the contact may want to leave on a form	Contact Description	Prefer Salesforce	Standard
18	Phone number	The contact's primary phone number. If the contact's phone number includes an extension, add 'x' then the extension number (e.g., x1234)	Business Phone	Prefer Salesforce	Standard
19	Postal code	The contact's mailing zip code	Mailing Zip/Postal Code	Prefer Salesforce	Standard

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Part 2

HubSpot Landscape

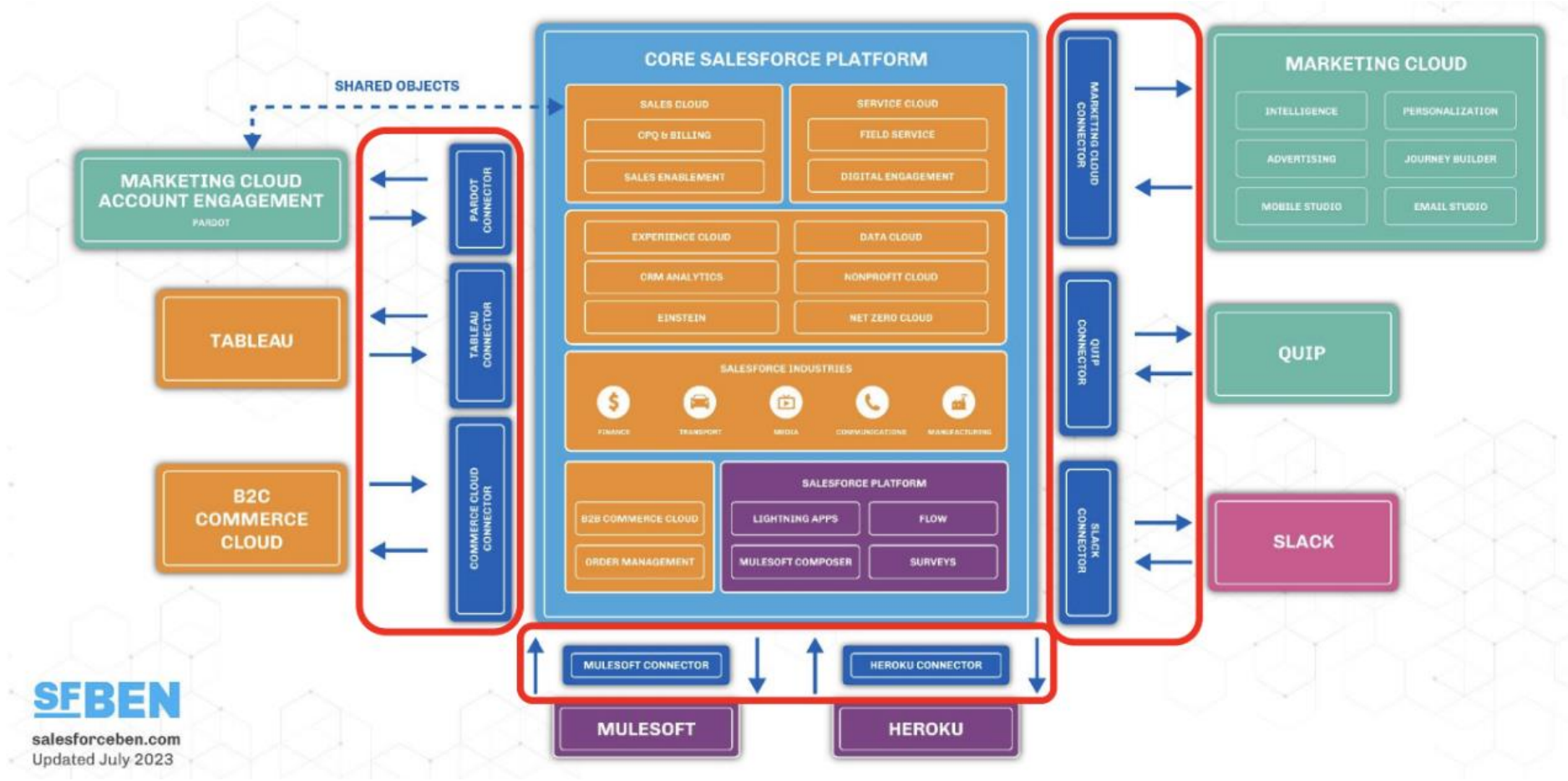


Source: HubSpot/

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Part 2

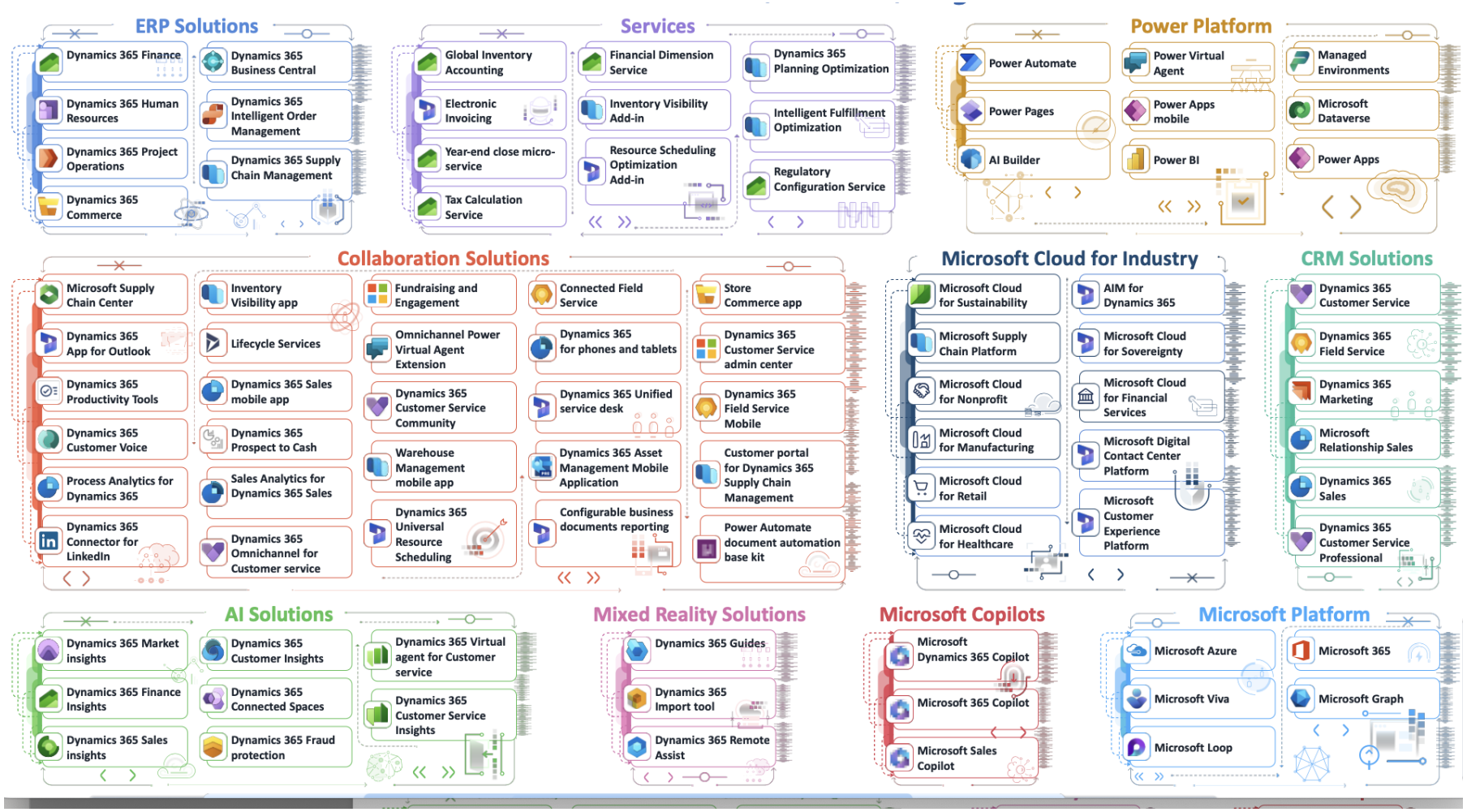
Salesforce Product Landscape



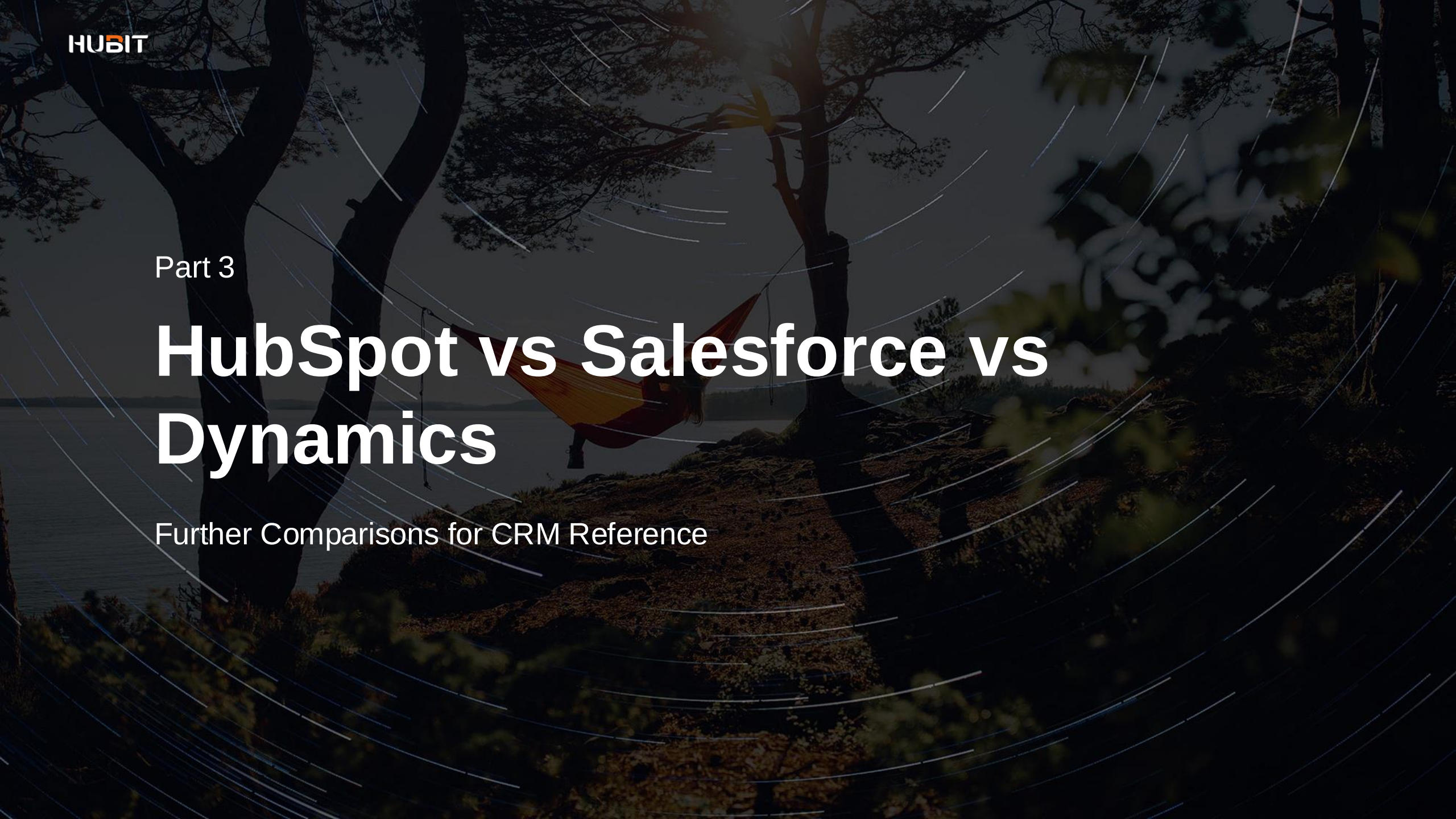
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Part 2

Microsoft Product Landscape



Source: Microsoft 2023. For new updates see https://learn.microsoft.com/en-us/dynamics365/release-plan/2024wave1/



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Part 3

HubSpot vs Salesforce vs Dynamics

Further Comparisons for CRM Reference

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Part 3

Comparing Sales Features

	HubSpot	salesforce
AI-Powered CRM	✓	✓
Predictive Lead Scoring	✓	✓
Dashboards and Custom Reports	✓	✓
Lead Reporting	✓	✓
Prospect Activity Reporting Tools	✓	$$$
Deal Funnel Report	✓	$$$
Recurring Revenue Tracking	✓	$$$
Unified Sales & Marketing Reporting	✓	$$$
Coaching Playlists	✓	$$$
Conversation Intelligence	✓	✓
Canned Snippets	✓	✓
Sequences	✓	✓
Data Quality Tools	✓	✓
Prospecting Workspace	✓	✓
Mobile Prospecting Tools	✓	✗
Sales Analytics	✓	$$$
Payments & Invoices	✓	$$$
Sales Automation	✓	✓
Meeting Scheduler	✓	$$$
Connected Inboxes	✓	$$$
Task Queues	✓	✓
Pipeline Management	✓	✓
Deal Tags	✓	✗
Quotes	✓	✓
Chatbots	✓	✓
Conversation Routing	✓	✓
LinkedIn CRM Sync	✓	✗
Customizable Page Layouts	✓	✓

HubSpot Sales Hub Enterprise vs Salesforce Sales Cloud Unlimited. Source: HubSpot "HubSpot Sales Hub vs Salesforce Sales Cloud".

	HubSpot	Microsoft Dynamics 365 for Sales
Sequences	✓	✓
Prospecting Workspace	✓	✓
Company Inisghts	✓	✗
Predictive Lead Scoring	✓	✓
Sales Automation	✓	✓
Seamless Lead Handoffs	✓	✓
Meeting Scheduler	✓	✓
Snippets	✓	✗
Native Calling	✓	✓
Dashboards & Reporting	✓	✓
Deal Inspection	✓	✗
Deal Funnel Reporting	✓	✗
Forecast Accuracy Tracking	✓	✓
Forecast Intelligence	✓	✓
Deal Journey Analytics	✓	✗
Prospect Activities Reporting Tools	✓	✗
Lead Reporting	✓	✗
Quotes	✓	✓
Payments & Invoices	✓	✗
Account-Based Marketing	✓	$$$
Sales Playbooks	✓	✗
Data Quality Tools	✓	✗
Live Chat	✓	✗
AI Content Assistant	✓	$$$
Phone Support	✓	✓

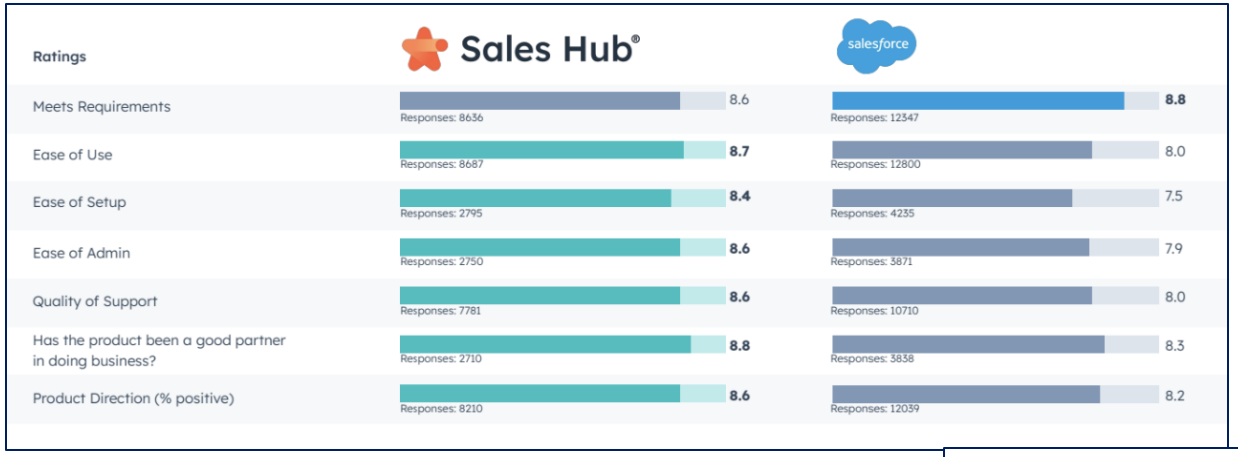
HubSpot Sales Hub Enterprise vs Dynamics 365 Sales Enterprise. Source: HubSpot "HubSpot vs Microsoft Dynamics Sales."

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Part 3

Comparing User Satisfaction

HubSpot vs. salesforce



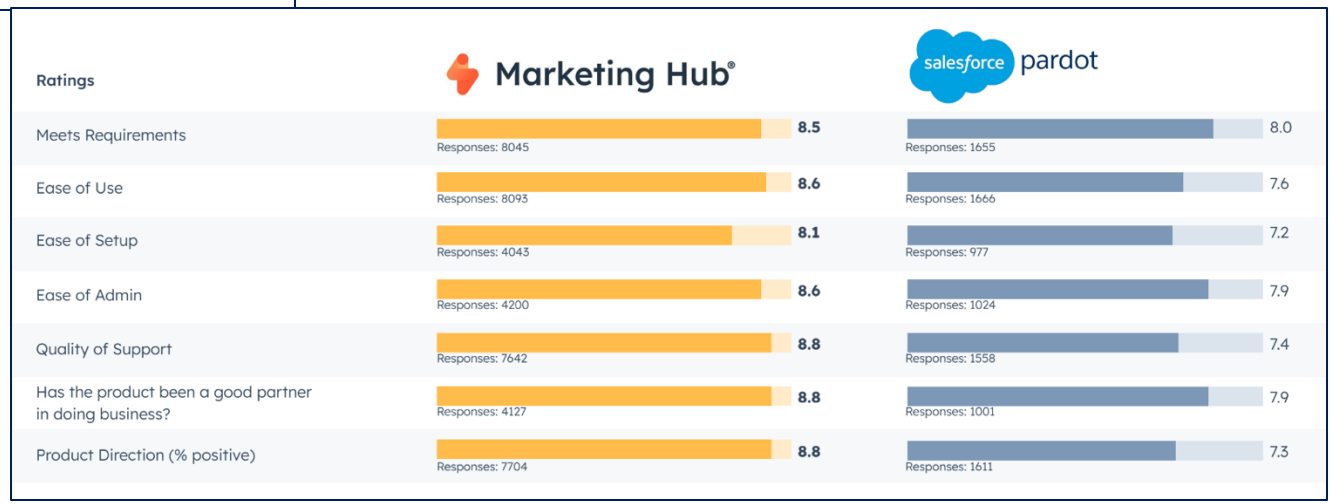
Ratings	Sales Hub®	salesforce
Meets Requirements	8.6 (Responses: 8636)	8.8 (Responses: 12347)
Ease of Use	8.7 (Responses: 8687)	8.0 (Responses: 12800)
Ease of Setup	8.4 (Responses: 2795)	7.5 (Responses: 4235)
Ease of Admin	8.6 (Responses: 2750)	7.9 (Responses: 3871)
Quality of Support	8.6 (Responses: 7781)	8.0 (Responses: 10710)
Has the product been a good partner in doing business?	8.8 (Responses: 2710)	8.3 (Responses: 3838)
Product Direction (% positive)	8.6 (Responses: 8210)	8.2 (Responses: 12039)

Note: HubSpot CRM's sales tools are in its "Sales Hub"
Note: HubSpot's marketing tools are in its "Marketing Hub". Salesforce's marketing was formerly known as "Pardot."

Source: G2 Reviews as of 07/2024

Source: G2 Reviews as of 07/2024

G2, the world's leading business software review platform, leverages real business user reviews to drive better purchasing decisions. Technology buyers, investors, and analysts use G2 to compare and select the best software based on peer reviews and synthesized social data.



Ratings	Marketing Hub®	salesforce pardot
Meets Requirements	8.5 (Responses: 8045)	8.0 (Responses: 1655)
Ease of Use	8.6 (Responses: 8093)	7.6 (Responses: 1666)
Ease of Setup	8.1 (Responses: 4043)	7.2 (Responses: 977)
Ease of Admin	8.6 (Responses: 4200)	7.9 (Responses: 1024)
Quality of Support	8.8 (Responses: 7642)	7.4 (Responses: 1558)
Has the product been a good partner in doing business?	8.8 (Responses: 4127)	7.9 (Responses: 1001)
Product Direction (% positive)	8.8 (Responses: 7704)	7.3 (Responses: 1611)

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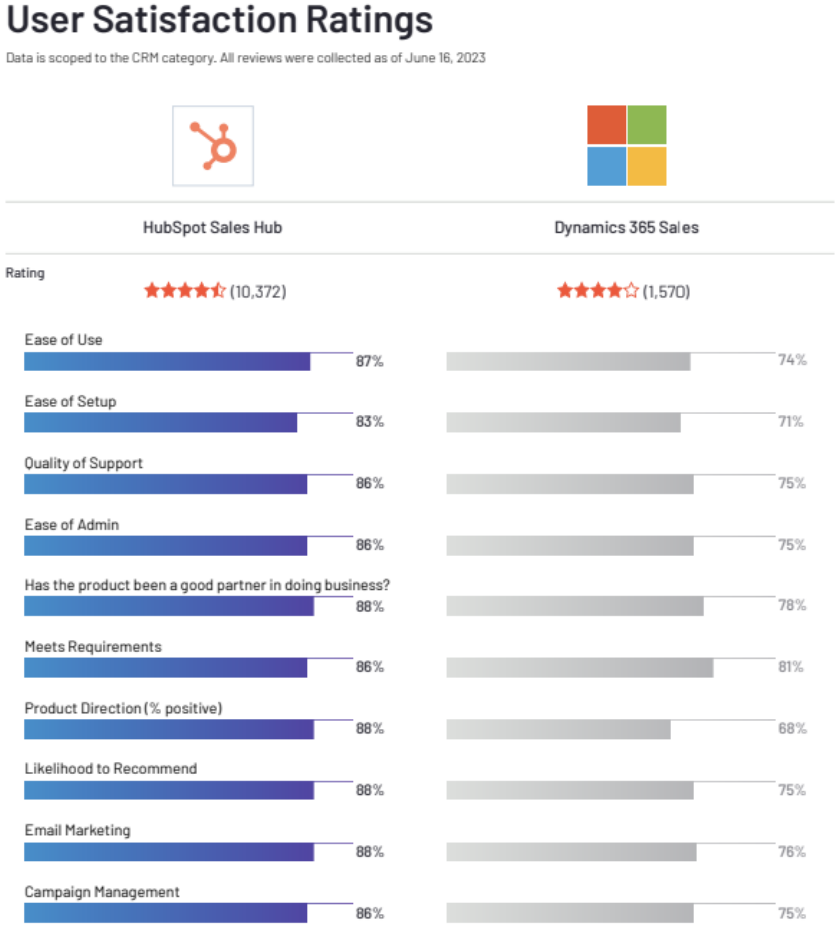
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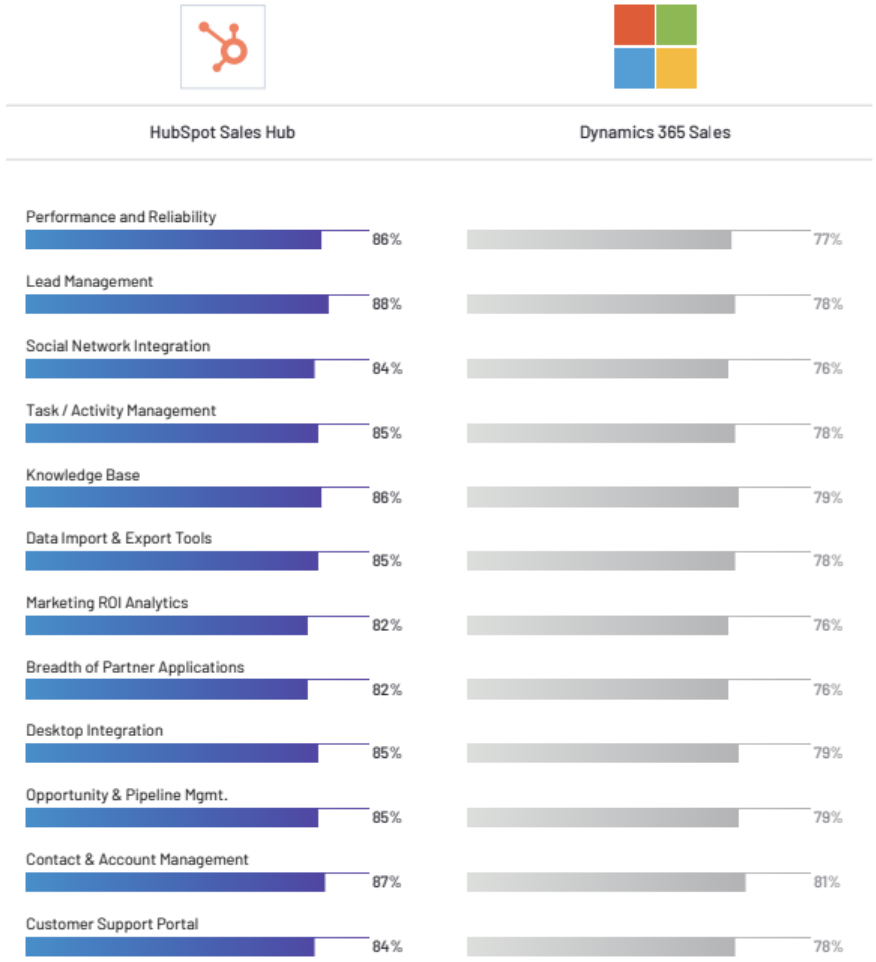
Comparing User Satisfaction

HubSpot vs. Dynamics 365

User Satisfaction Ratings

Data is scoped to the CRM category. All reviews were collected as of June 16, 2023





(User Satisfaction Ratings continues on next page)

Source: HubSpot ©2023 G2, Inc. All rights reserved.

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Part 3

HubSpot Objects vs Salesforce – an example of terminology variance

HubSpot Term	Definition	Salesforce Term	Definition
Contact	Anybody your company communicates with in the course of doing business	Contact	Engaged customers, partners, or affiliates tied to accounts or opportunities
		Lead	People who have expressed interest in your product or company
		Person Account	Store information about individual customers who aren't associated with a company.
Company	An organization that you want to track in your database	Account	An organization, company, or consumer that you want to track
Deal	An ongoing transaction that a sales team is pursuing with a contact or company	Opportunity	Individual sales and revenue-generating changes
Task	To-do list items with an owner and a due date	Activity	An event, task, a call you've logged, or an email you've sent
Engagement	Interactions with individuals about your industry, brand, products, and services		
Campaign	A group of related marketing assets and content under a certain marketing effort	Campaign	A tool to track outbound marketing efforts with various marketing collateral

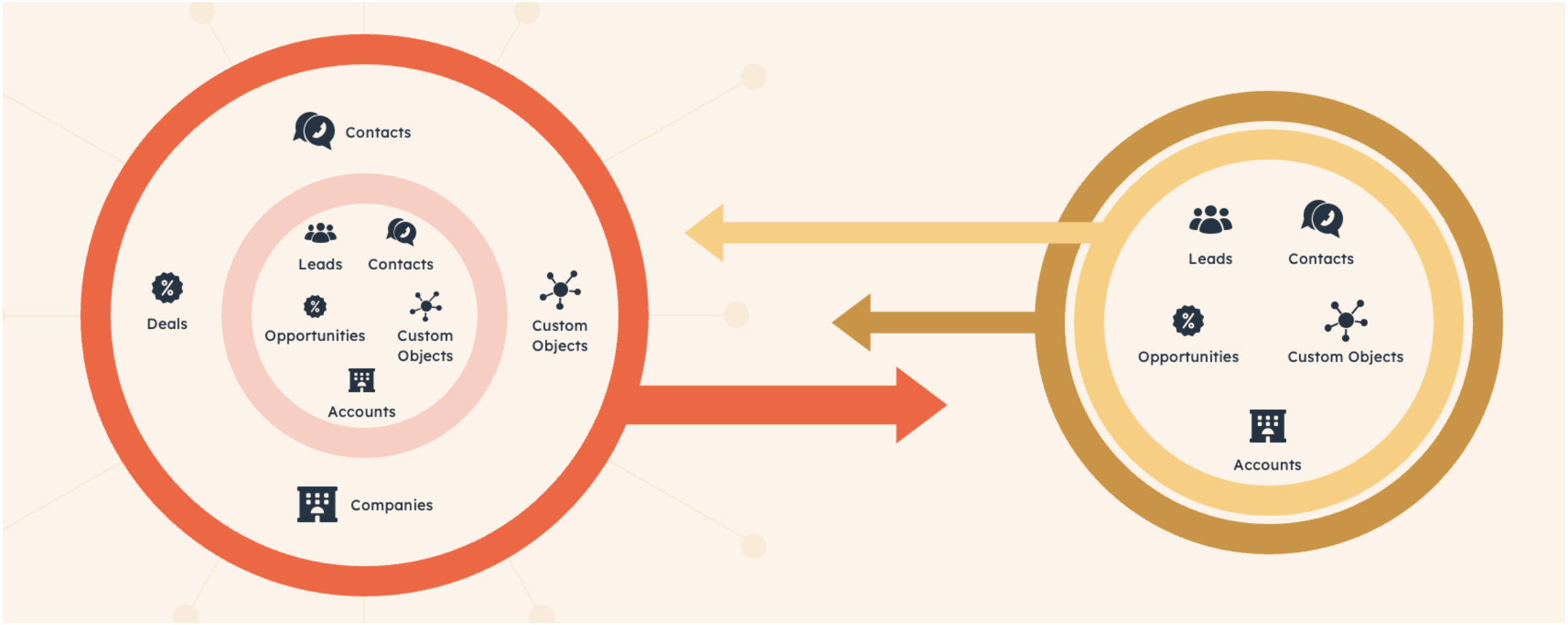
Source: HubSpot Academy



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HubSpot Salesforce Integration

Companies choosing to stick with, say, Salesforce for sales AND keep marketing on HubSpot, typically choose to use the native HubSpot-Salesforce Integration. Easy to implement, it is often also used in connection with a migration.



https://knowledge.hubspot.com/salesforce/install-the-hubspot-salesforce-integration

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Worthwhile links

- https://www.hubspot.com/comparisons/microsoft-dynamics-vs-hubspot
- https://www.hubspot.com/comparisons/salesforce-vs-hubspot
- https://www.hubspot.com/comparisons/best-crm
- https://www.hubspot.com/products/salesforce -> did you know that it's easy to integrate HubSpot and Salesforce? Use Case: Sometimes sales is deeply entrenched in Salesforce, but marketing wants to keep things moving and chooses to use HubSpot CRM & Marketing Hub.
- https://help.salesforce.com/s/articleView?id=sf.glossary.htm&type=5 Glossary of Salesforce terms as they appear throughout the Salesforce documentation suite.
- https://www.forbes.com/advisor/business/software/salesforce-vs-microsoft-dynamics/ Get Forbes' view on the battles of the legacy giants

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THANKS!

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