

# Rapport d'analyse

# atechor



# Pipeline

Pipeline CRM

Dernière mise à jour : 21/02/2024

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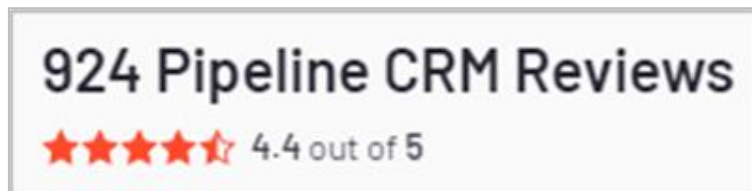
## Avis des utilisateurs : 9/10

Calcul avis	Notes	Avis
G2	4,4 / 5	924
Capterra	4,3 / 5	619
Trustradius	5 / 5	16
Gartner	4,2 / 5	40
Moyenne	<b>4,36 / 5</b>	



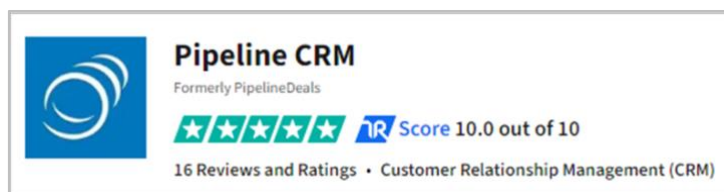
**Pipeline CRM**  
 ★★★★★ 4,3 (619) Écrivez votre avis !

[\(Capterra\)](#)



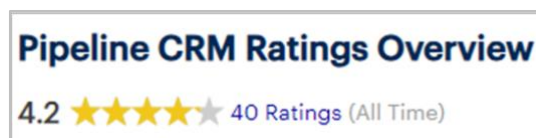
**924 Pipeline CRM Reviews**  
 ★★★★★ 4.4 out of 5

[\(G2\)](#)



**Pipeline CRM**  
 Formerly PipelineDeals  
 ★★★★★ TR Score 10.0 out of 10  
 16 Reviews and Ratings • Customer Relationship Management (CRM)













[\(Trustradius.com\)](#)



**Pipeline CRM Ratings Overview**  
 4.2 ★★★★★ 40 Ratings (All Time)

[\(Gartner.com\)](#)

# Récompenses : 10/10

 <p><b>High Performer</b> Enterprise SUMMER 2021</p>	 <p><b>Highest User Adoption</b> Enterprise SUMMER 2021</p>	 <p><b>Leader</b> Small Business SUMMER 2021</p>
<p><b>Enterprise High Performer</b> G2 Summer 2021</p>	<p><b>Enterprise Highest User Adoption</b> G2 Summer 2021</p>	<p><b>Small Business Leader</b> G2 Summer 2021</p>
 <p><b>Expert's Choice</b> 2019 Award Awarded by FinancesOnline</p>	 <p><b>Great User Experience</b> 2019 Award Awarded by FinancesOnline</p>	 <p><b>CATEGORY LEADERS</b> 2019</p>
<p><b>Expert's Choice</b> FinancesOnline 2019 Award</p>	<p><b>Great User Experience</b> FinancesOnline 2019 Award</p>	<p><b>Category Leader</b> GetApp Best CRM Software for 2019</p>
 <p><b>CV</b> Most Reputable Corporate Excellence Awards 2019</p>	 <p><b>High Performer</b> Mid-Market SPRING 2019</p>	 <p><b>CRM Excellence</b> <b>TMC</b> AWARD 2019</p>
<p><b>Most Reputable</b> Corporate Excellence Awards 2019</p>	<p><b>Mid-Market High Performer</b> G2 Spring 2019 Awards</p>	<p><b>2019 CRM Excellence Award</b> TMC's CUSTOMER Magazine</p>
 <p><b>TOP PERFORMER</b> Spring 2019 Featured Customers</p>	 <p><b>High Performer</b> Mid-Market SPRING 2019</p>	 <p><b>BRONZE</b> 2019 STEVIE WINNER FOR SALES &amp; CUSTOMER SERVICE</p>
<p><b>Top Performer</b> Featured Customers Spring 2019</p>	<p><b>Top 50 Products for Sales</b> G2 Best Software Awards</p>	<p><b>Bronze Stevie Winner</b> Customer Service Department of the Year</p>



<p><b>FrontRunners for CRM</b> Software Advice, Powered by Gartner</p>	<p><b>Inc. 5000</b> Fastest-growing private companies in US</p>	<p><b>Leader</b> G2 Crowd Fall Awards</p>
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[Pipelinecrm.com](http://Pipelinecrm.com)

<p><b>Capterra</b> <b>SHORTLIST</b> 2021</p>	<p>/ CAPTERRA SHORTLIST</p> <p>Pipeline CRM is featured in 2 Capterra Shortlists</p> <p>CRM / 2021</p>
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[Capterra](http://Capterra)

# Interface et expérience utilisateur : 8/10

## Retours des utilisateurs sur l'interface :

Facilité d'utilisation

★ 4,3

### + Avantages :

The BEST small biz sales relationship management tool we've used (7+ years now every single day) Very intuitive **interface**. Amazingly powerful API (if you want to code connect it to your own systems) Great customer support team (you talk to real people, in the real office) Extremely powerful list filtering and saved reports tools Constantly adding new features and enhancements to make it more powerful without more "clutter"

### + Avantages :

Pipeline Deals is very straightforward and easy to use. The **interface** is able to be customized which is nice, and the ability to import and export data us useful for reporting.

### + Avantages :

PipelineDeals is a fairly full-featured CRM at a very reasonable price. While the **interface** can be a bit convoluted and reporting perhaps more complicated than necessary, the support team is very responsive and the development team seems to continually work on improvements and adding functionality.

### + Avantages :

Ease of use and capabilities. Customer service. iPhone App. Email Tracking. Email **interface**.

### + Avantages :

Pipeline Deals has a clean **interface**. It's easy to use, and from the perspective of a manager, it's the sort of thing that somebody who isn't too technical (or organized) can still use efficiently. At the same time, for people who are excited about CRM functionality and drilling into client data (like me) there are some powerful tools to really target exactly the set of clients you want. I also like the fact that when you call user support, a real human being answers the phone who is able to resolve your issues for you on the spot.

([Capterra.fr](https://www.capterra.fr))

### What do you dislike about Pipeline CRM?

Although the **interface** is quite impressive, addition of more feature like multiple colour option for individual person in calendar will surely help to create visualized dashboards

### What do you like best about Pipeline CRM?

What I like most about the CRM is that the user **interface** is very flexible. You can choose what layout you want, what fields to include or not and standardize it across your teams.

## "User friendly interface"

What do you like best about Pipeline CRM?

User friendly interface with unlimited filters for managing a unique sales pipeline.

What do you dislike about Pipeline CRM?

The user interface is less attractive than engaging yet gets the job done.

(G2)

### Cons

User interface: Some users have found the user interface of Pipeline CRM to be lacking, particularly on the iPad app. They feel that there is room for improvement in terms of design and usability.

### Pros and Cons

⊕ User interface.

(Trustradius.com)

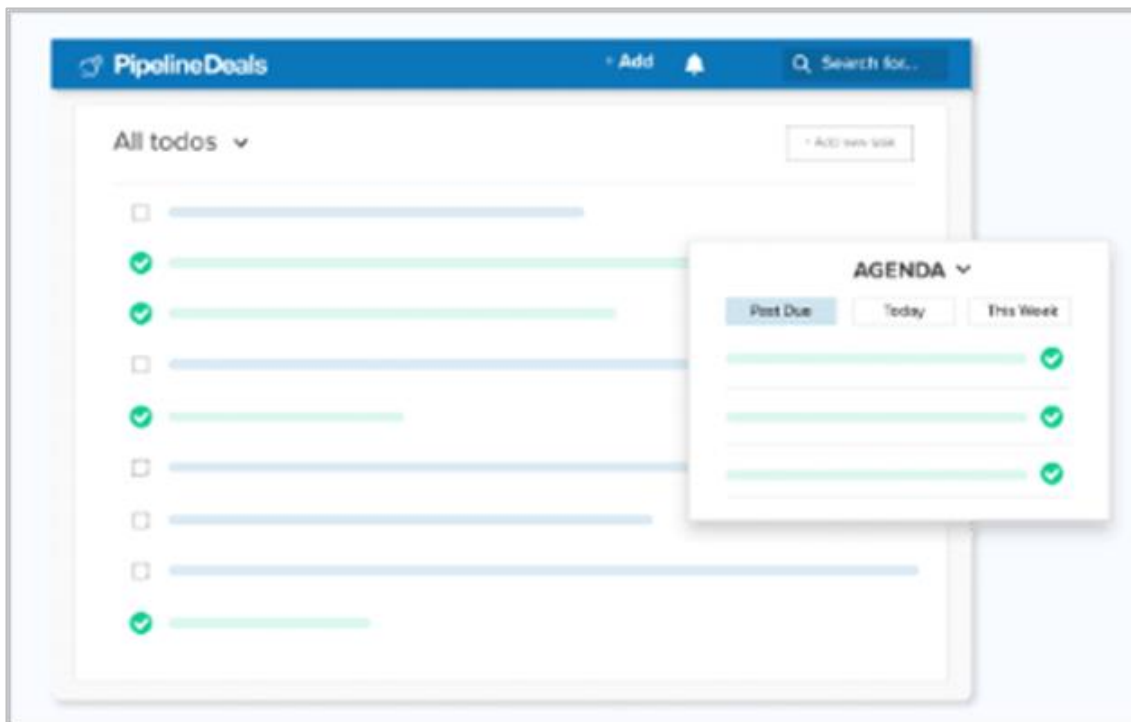
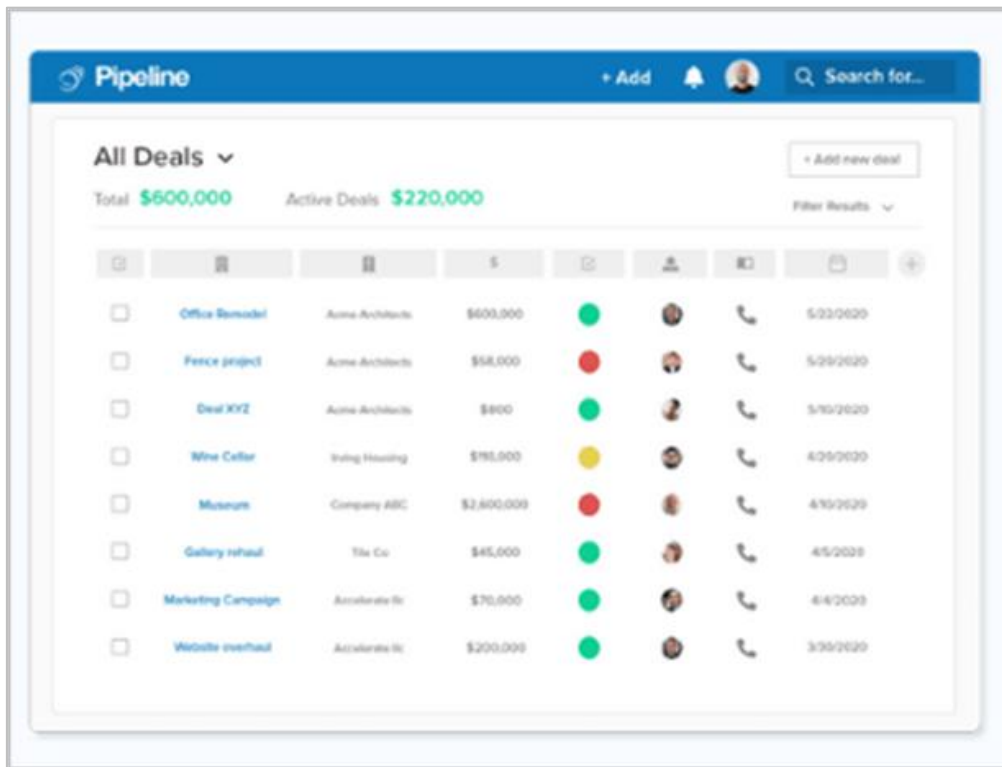
4.0 ★★★★★ Overall User Rating

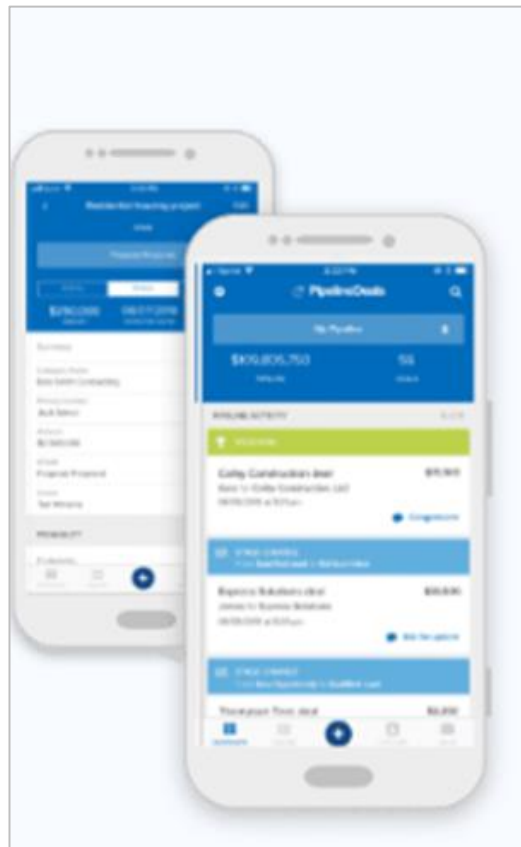
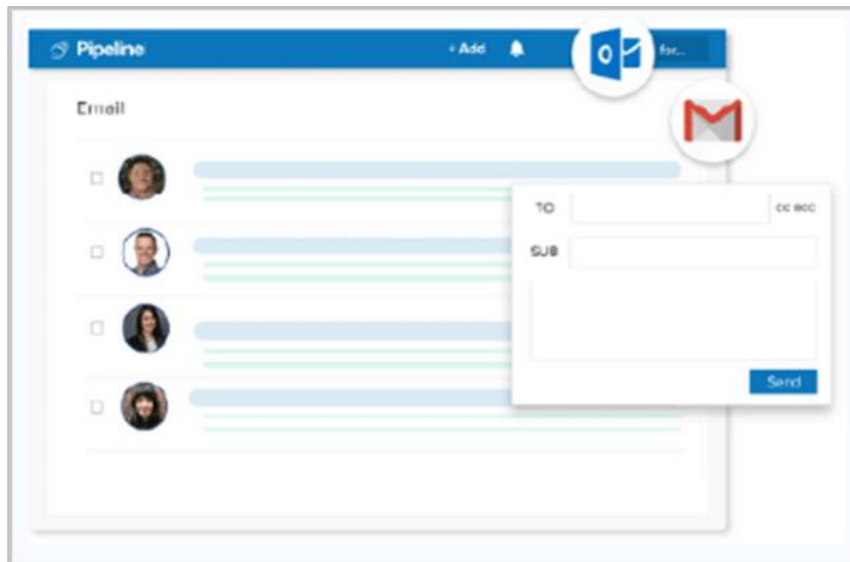
Product(s): Pipeline CRM

**Overall Comment:** "Ease of use is a key benefit, as is the intuitive way the system works. It's great for organizing everything in chronological order and for efficiently managing views, it has great integration with MailChimp and QuickBooks. It provides the ease of having all your leads in one place and the ability to easily search and find them. The reporting capability is also very robust, with the ability to reconfigure reports with a few clicks. Allows you to create reports with different variables. PipelineDeals allows the flexibility to enter now and adjust later, which is a lifesaver for a sales rep who is constantly being pulled in a million directions. It allows the ability to manage your contacts in many ways with the search features it offers."

(Gartner.com)

### Interface en image :














[Pipelinecrm.com](http://Pipelinecrm.com)

**Analyse :** Les utilisateurs sont majoritairement satisfaits de la qualité de l'interface la décrivant comme agréable à utiliser et ergonomique. Même si certains d'entre eux ont trouvé les affichages alambiqués et complexes à appréhender. De notre côté, nous n'avons pas pu analyser l'interface puisque les nouvelles versions sont introuvables sur internet.









# Couverture fonctionnelle : 7/10







 <h3>Email Campaigns &amp; Tracking</h3> <p>Track all your email messages, opens, clicks, and downloads automatically as activities in your account.</p> <p>Explore: CRM Tracking and Reporting features</p>	 <h3>Custom Fields</h3> <p>Prioritize the customer details that are most important to your business. You can create up to 25 custom fields that will automatically appear on every deal page.</p> <p>Explore: CRM Account Customization features</p>	 <h3>Easy Integrations</h3> <p>From Gmail to QuickBooks, Pipeline CRM offers popular integrations with email providers, marketing, and sales software.</p> <p>Explore: Easy CRM Integrations</p>
 <h3>Sales Forecasting</h3> <p>When you understand past trends, you'll be able to confidently forecast the salespeople on track to hit quota.</p> <p>Explore CRM Reporting features</p>	 <h3>Track Commissions</h3> <p>Automate sales commissions to reduce cost and increase transparency for remote sales teams.</p> <p>Explore: CRM Automation features</p>	 <h3>Custom Deal Stages</h3> <p>Choose the default titles for stages: Qualified Lead, Proposal, Contract, and Signed. Or you can customize these deal stage titles to suit your team's sales language.</p> <p>Explore Custom CRM Deal Stages</p>

 <h3>Unlimited Files Storage</h3> <p>We offer unlimited data storage for growing sales teams without any data caps. Feel free to store all your documents, images, and communication records without additional charges.</p>	 <h3>User Permissions</h3> <p>Assign permissions for your team members to set what they can see and do within the application.</p> <p>Explore Account Customization features</p>	 <h3>Mobile App</h3> <p>Pipeline CRM mobile CRM for iOS and Android helps you stay on top of your sales while you're out doing your job.</p> <p>Explore Mobile CRM features</p>
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[Pipelinecrm.com](https://Pipelinecrm.com)

 <h3>Activity tracking</h3> <p>Track the work your sales reps do every day. And get a high level view of the historical account of your pipeline, won or lost deals, your active pipeline, and deal stage status. Learn more</p>	 <h3>Sales forecasting</h3> <p>When you understand past trends, you'll be able to confidently forecast the salespeople on track to hit quota. Easily view which sales team members you need to work more closely with.</p>	 <h3>Deal insight</h3> <p>View deals at a high level through a graphic visualization of your sales data. From there, you'll be able to determine what's contributing to the success or failures of your deals.</p>
 <h3>Foreign currency tracking</h3> <p>Track deals in any market or local currency your business sells in. Pipeline CRM instantly converts deals to one currency so that you can understand your global sales team's results.</p>	 <h3>Central hub</h3> <p>Even if your salespeople are in the field, or working remotely, Pipeline CRM brings all of their activity and shared data into one cohesive place. It gives shared visibility into an otherwise offline sales process.</p>	 <h3>Powerful reports</h3> <p>Our comparison charts are a great way to share data with managers and team members. They work as quick progress updates, or to communicate the patterned success or failure of certain sales tactics.</p>

[Pipelinecrm.com](https://Pipelinecrm.com)

 <h3>Personalize Your Dashboard</h3> <p>Simplify your workflow with mission-critical information displayed on your home dashboard. Customize it by adding saved list views, reports, goals, and more.</p>	 <h3>Define Your Deal Stages</h3> <p>Customize your sales process by editing and adding new deal stages, deal statuses, and deal loss reasons. Indicate how likely a deal is to close based on a probability percentage associated with each deal stage.</p>	 <h3>Arrange Views Your Way</h3> <p>Order information in your List Views the way you need to see it. List Views are filtered, sorted, and organized based on your custom CRM data fields and system defaults.</p>
 <h3>Collect Unique Attributes</h3> <p>Track data specific to your industry, company, or personal workflow. Record valuable information like product interest or personal details for relationships like birthdays or hobbies.</p>	 <h3>Streamline Record Input</h3> <p>Customizing record creation forms save time and energy by collecting only what is needed. Make certain fields required, or rearrange and hide fields you don't need when updating records</p>	 <h3>Customize Reporting</h3> <p>Create reports to fit your needs. Customize the data segments you need, as well as how they appear in your visual analysis. Easily add and use custom fields in your reports.</p>

[Pipelinecrm.com](https://Pipelinecrm.com)

 <h3>Streamlined pipeline</h3> <p>Let Pipeline CRM facilitate your sales process by automatically assigning tasks and updating leads as they move through the sales pipeline. Get real-time visibility into your pipeline, from start to finish. <a href="#">Learn more</a></p>	 <h3>Shared updates</h3> <p>Update once, update everywhere. Automated actions will instantly notify sales managers and other team members when deals are closed, milestones are reached, and more.</p>	 <h3>'Next step' suggestions</h3> <p>Automatically prompt the next move on a deal. Pipeline CRM will help your salespeople maintain focus and stay on track with the best action to take at every stage in the process.</p>
 <h3>Recurring deals</h3> <p>Have clients on a retainer, or recurring deals? Traditional sales workflows struggle to support recurring revenue models, but Pipeline CRM can instantly create a new deal when a recurring deal closes.</p>	 <h3>Bulk uploads</h3> <p>No need to add your clients manually. We get it, the thought of onboarding new software can be scary. But with Pipeline CRM you can bulk upload your existing contacts, and they're all in our system in minutes. <a href="#">Learn more</a></p>	

[Pipelinecrm.com](https://Pipelinecrm.com)



### Mobile business card scanner

With the mobile business card scanner you can go from card to Pipeline CRM contact instantly. You can create CRM contacts from business card photos you've taken in the past. Add multiple new contacts without leaving the app.



### Nearby geolocation feature

Instantly access a map of a contact's location from Pipeline's CRM leading CRM mobile app. View multiple contact locations where you are, help your sales team meet clients faster, and make the most use of their time out in the field.



### One-click activity notes

Save time by adding your most frequent notes as "one-click" activities. Instead of manually typing, with just one click you can add common activities such as "made a phone call" or "signed contract".



### Talk-to-text records

Record and store all of your field sales activities while it's fresh in your mind, and it will be converted to text. No more manually typing in your notes while you're on the go.



### Real-time notifications

Receive phone alerts when someone mentions you on a lead, contact, or ongoing deal. Stay up-to-date with recently won or lost deals, stage changes, and more pipeline updates.



### Tasks and calendars

Update, organize, and view your calendar from the app. Get quicker access to priority contacts and leads you've recently interacted with.



### Smart search

Save time by using one search bar for everything. Find your People, Companies, and Deals quickly and easily within our universal search bar on mobile.

[Pipelinecrm.com](https://Pipelinecrm.com)

## Fonctionnalités

★ 4,0

**Cons:** As a smaller company some of the integrations that other CRMs have were either missing or lacking. However, Pipeline Deals is getting better about innovation. One of my favorite shortcuts they rolled out was a LinkedIn plugin, this allowed for you to connect with somebody on linkedIn and in one click import them into your CRM. However, many times it would populate the fields with incorrect info or just generic info like where their company was headquartered instead of where that employee was actually located. Additionally, at times the APIs for some of these newer services would change, and then the **features** would not work.

— "It did lack some **features** that would be handy. The entire API section was a little confusing."

**Overall:** We use Pipeline Deals to manage our leads and sales pipeline. What we like most about this CRM is the ease of use and an ability to create custom fields on Customer, Companies and Deals level. Its very easily adaptive and the interface itself is very clean. Offers great reporting **features** as well. We are also using Pipeline Deals as our daily task management system and it let us very easily manage our followups and daily to'dos

**Pros:** I love the way Pipeline CRM has a robust collection of **features** that make my everyday customer management so easy, no headaches.

**Pros:** Flexibility, accessibility, ease in use, automation, simply import/export **features**, mobile use,

**Recommendations to other buyers:** This is the BEST CRM product that I've seen on the market its a powerful tool. Make sure you use ALL the **features** that are offered to you to maximize this awesome application.

**Pros:** Pipeline has many **features** that are easy and the filtering options are great. The reporting is pretty basic and as long as you do not have a lot of Sales people or too many products it is great. The deal feature is better than other softwares. the limitations on "task", no way to audit or add checklist etc., as well as not being able to tag and segregate your list in more detail needs to be looked into. We have unfortunately switched to another software that has these capability as well as being a great CRM and has more customization options.

**Cons:** It also does not have any marketing **features** built in which if you sell and market for your position then you will want a software that can manager your customers, contacts, sales, products, and email marketing. the limitations on "task", no way to audit or add checklist etc., as well as not being able to tag and segregate your list in more detail needs to be looked into. We have unfortunately switched to another software that has these capability as well as being a great CRM and has more customization options.

[\(Capterra\)](#)

**Pipeline CRM Features**

**Highest-Rated Features**

- **Performance and Reliability - CRM**  
2% above average
- **Contact & Account Management**  
Average
- **Opportunity & Pipeline Mgmt.**  
2% above average

**Lowest-Rated Features**

- **Breadth of Partner Applications - CRM**  
-6% below average
- **Social Network Integration**  
-5% below average
- **Marketing ROI Analytics**  
-6% below average

**What do you like best about Pipeline CRM?**

It has exactly the **features** I need and none of the **features** I don't need. I can track people, companies, and deals, and create tasks for myself and others quickly and easily.

I love that an actual person answers every call and can help or guide me every time without hesitation. They talk to you like a friend and know about your business because they actually care. They are constantly growing and changing with the times to add more **features** that are impactful in my business.

[\(G2\)](#)

## FEATURES

### Sales Force Automation

This is the technique of using software to automate certain sales related tasks.

> [Show Features](#)

6.9

Avg 7.8

### Customer Service & Support

This component of CRM software automates help desk, call center and field service management.

> [Show Features](#)

7.8

Avg 7.6

### Marketing Automation

This component of CRM software helps to automate and scale marketing tasks and the subsequent analysis of those efforts.

> [Show Features](#)

5

Avg 7.7

### CRM Project Management

This component of CRM software helps users initiate, plan, collaborate on, execute, track, and close projects.

> [Show Features](#)

4.5

Avg 7.6

### CRM Reporting & Analytics

Reporting and analytics in CRM software includes sales forecasting, pipeline analysis, and automated dashboards.

> [Show Features](#)

6.7

Avg 7.6

### Customization

This addresses a company's ability to configure the software to fit its specific use case and workflow.

> [Show Features](#)

9.5

Avg 7.7

### Security

This component helps a company minimize the security risks by controlling access to the software and its data, and encouraging best practices among users.

> [Show Features](#)

6

Avg 8.4

### Social CRM

This component of CRM software helps companies leverage social media in engaging with customers.

> [Show Features](#)

8.1

Avg 7.4

### Integrations with 3rd-party Software

This involves the CRM software's ability to integrate with other systems, whether external or homegrown.

> [Show Features](#)



### Platform

> [Show Features](#)



While PipelineDeals fulfills many needs of its users, some have expressed a desire for more advanced **features** such as stronger tracking capabilities, a robust sales console, advanced dashboards, customizability, and predictive analytics. However, despite these limitations, PipelineDeals has been chosen over other CRM services for its comprehensive **features** that address both front-of-house operations and back-office financial and provisioning operations. It is widely used across organizations to improve lead generation, sales fulfillment, and future customer follow-up. Integrations with digital contracting software and lead vendors further streamline processes by automatically creating leads and initiating contracts. Overall, PipelineDeals serves as an effective B2B and B2C sales CRM solution for businesses looking for a centralized platform to manage their sales pipeline efficiently.

Limited Relevance Outside Sales Setting: A number of users have mentioned that Pipeline CRM is strictly focused on sales and lacks **features** that are relevant outside of a sales setting. Specifically, they feel that **features** like tracking dollars within a pipeline, hot/cold markers, and notifications do not meet their requirements for non-sales purposes.

⊖ It is strictly a sales CRM, so there are many **features** that aren't particularly relevant outside of a sales setting, such as dollars within a pipeline or Hot/Cold markers that aren't that great of markers or notifications for the things I require.

[Trustradius.com](https://www.trustradius.com)

### Product Capabilities

4.2



**Overall Comment:** "The Pipeline Deals Dashboard is very intuitive and gives a high-level understanding of how my Leads are going, what progression. It has all unique kind of **features**, reminders about deal slipping, action item and whole together a lot of sales-centric tracking feature. **Features** like Report, Checking activity status on lead, blocking calendar for the meeting, follow-ups, simultaneous changes, creating agendas for the day is what a Sales Person need. The User Interface is very smooth and various reporting and dashboard tools give quick and high insights on the lead progression. The integration with Microsoft Outlook and mail tracking **features** are also great but "

The system is intuitive with the needed basic **features**. Easy to get started and understand. We have all our customer interaction on Pipeline Deals

One of industry best CRM software which has really helped us scale. Selected them because they had the **features** we were looking for and API support was world class to build my extensions.

[Gartner.com](https://www.gartner.com)

**En ce qui concerne la démonstration :**

**Le logiciel Pipeline CRM offre une plateforme robuste et conviviale pour la gestion efficace des ventes et des contacts.** Dès que vous vous connectez à la page d'accueil, vous pouvez aisément visualiser et suivre l'évolution de vos opportunités commerciales, clairement segmentées selon les différentes étapes de transactions que vous avez définies. Cette organisation intuitive permet de garder un œil vigilant sur le cheminement de chaque deal, offrant ainsi une vision précise de l'état de vos activités commerciales.

En parcourant les onglets essentiels, vous découvrirez les piliers fondamentaux de PipelineDeals. Les onglets dédiés aux Entreprises, aux Opportunités (Deals) et aux Contacts représentent le cœur névralgique de votre gestion client quotidienne. Ces sections sont dynamiquement mises à jour, garantissant ainsi que vous disposiez toujours des informations les plus actuelles concernant vos contacts et prospects. C'est là que vous établissez et entretenez des relations privilégiées avec vos clients potentiels, établissez des connexions essentielles, et suivez les interactions clés qui font progresser vos affaires.

**L'onglet Agenda** représente une fonctionnalité cruciale pour maintenir le rythme et l'élan de vos transactions. Il filtre et hiérarchise les tâches à accomplir, veillant ainsi à ce que chaque étape soit franchie de manière fluide et efficace. Le calendrier, qui est synchronisable avec Google ou Outlook, affiche également ces tâches de l'agenda pour vous assurer de ne manquer aucune échéance cruciale.

**La gestion des emails** est également intégrée dans Pipeline CRM, simplifiant ainsi le suivi de vos communications avec vos contacts. Que vous utilisiez Google ou Outlook, vous pouvez synchroniser vos comptes pour centraliser vos échanges avec vos clients et prospects.

Pour une analyse approfondie de vos performances, **l'onglet Rapports** offre des tableaux de bord offrant des aperçus perspicaces de vos activités commerciales. Cela vous permet d'identifier les tendances, de mesurer les progrès et de prendre des décisions éclairées pour stimuler votre croissance.

De plus, **Pipeline CRM propose des vues de liste puissantes** qui bien qu'elles puissent rappeler l'apparence d'Excel, offrent une personnalisation et des fonctionnalités de filtrage avancées. Vous pouvez aisément organiser et hiérarchiser vos champs personnalisés selon vos besoins, offrant une flexibilité et une adaptabilité inégalées.

Enfin, ne négligez pas l'icône du signe plus située dans le coin, qui vous **permet d'ajouter rapidement des données de contact**. C'est un raccourci précieux pour garantir que toutes les informations importantes sont correctement enregistrées

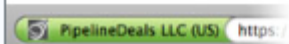
[\(Youtube\)](#)

# Sécurité et confidentialité des données : 6/10

## Security

The Security Of Our Application And Your Data Is Our Top Priority.

We use industry best practices to establish and maintain a secure online experience. And we always remember that your data is your data. We never touch your data without your explicit permission, and we make it easy to export it whenever you want.



### Secure connections

When you log into Pipeline, you are connected via a 256 bit extended-validation SSL security certificate provided by VeriSign. This type of secure connection is comparable to the online security provided by many major banks and financial institutions. You can verify that you are indeed connected to Pipeline via a secure connection. When you're logged in, your browser bar will display either a green bar or a lock icon near the web address.



### Secure data centers

Pipeline's data is stored in Amazon Web Services Data Centers. Amazon services are provided in accordance with security best practices both online and offline. Learn more about Amazon's security practices.



### Redundant backups

We back up our entire database every four hours in geographically redundant locations.



### Third-party authentication

Pipeline authenticity and security is validated by Verisign, a trusted authority that provides third party verification for websites around the world.



## log4j vulnerability

With regards to the latest "log4j" vulnerabilities (CVE-2021-44228 and CVE-2021-45046), our team has completed an audit of our internal systems. It has been confirmed that none of our systems use the vulnerable library. To date, there has been no evidence of compromise to Pipeline or any of our third-party systems. We will continue to closely monitor the situation and will publish any further updates as needed.

## Google's data usage

Pipeline's use of information received from Google APIs will adhere to [Google API Services User Data Policy](#), including the Limited Use requirements. Pipeline's use of information received, and Pipeline's transfer of information to any other application, from Google APIs will adhere to Google's Limited Use Requirements.



[Pipelinecrm.com](https://pipelinecrm.com)

### Security

This component helps a company minimize the **security** risks by controlling access to the software and its data, and encouraging best practices among users.

[> Show Features](#)



[Trustradius.com](https://Trustradius.com)

## Stabilité et évolutivité : 8/10

**Overall:** The entire point of this type of software is to be able to **scale** customer relationships and extract data to make decisions re: those relationships and customer profiles. When it takes days to produce reports, the purpose is defeated.

([Capterra](#))

One of industry best CRM software which has really helped us **scale**. Selected them because they had the features we were looking for and API support was world class to build my extensions.

([Gartner.com](#))

### Essential Scalability

“Since we started in 2006, we’ve gone from tracking three or five deals at a time to having a couple hundred prospects in various stages of our sales pipeline at any given time,” says MGECOM CEO Matt Enders. “Our messaging, flow, and frequency of touchpoints have certainly evolved over the years, but Pipeline CRM keeps us from making missteps, no matter how complex things get.” MGECOM relies on Pipeline CRM to tell their salespeople what they need to do and when they need to do it. It keeps track of everything in a customized manner, so they never drop the ball on a deal. Best of all, Pipeline CRM doesn’t break the bank.

“The tracking has to be much more robust than any one person’s brain. Pipeline CRM gives us **scalability**. It’s full featured and incredibly inexpensive.”

([Pipelinecrm.com](#))

### Improved lead and sales process management

Pipeline CRMs visualize the sales funnel, enable lead tracking, prioritization, and automation, which in turn, improves lead and sales process management. It facilitates data-driven decisions for more effective lead conversion and sales processes by centralising data, providing analytics, and supporting forecasts. This improves communication and **scalability**.

### Elevated sales productivity







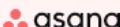







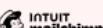

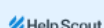



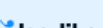

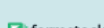

With pipeline CRM's sales pipeline management capabilities, you can quickly track your sales team's progress and identify any areas of difficulty. The team managers can then strengthen the team members' efforts and assist them where they are weak. This may help increase the overall productivity of the sales team. Goal-tracking also inspires sales teams, and **scalability** guarantees productivity, as your company grows.

### **Scalability** through proper resource allocation

Making the most of each sales stage also enables sales managers to decide how much and what resources are required to advance a contract to the following stage. For instance, a company can coordinate the efforts of its marketing and sales departments. Pipeline management can promote synergy between the two rather than considering them as competitors, freeing up more resources and energy for use elsewhere.

([Salespanel.io](https://salespanel.io))

# Connectivité et intégration : 8/10

<p> <b>elementor</b> <span>WEB FORMS</span></p> <h2>Elementor Form</h2> <p>Integrate Pipeline CRM with Elementor Forms on WordPress. Automate lead capturing from the website</p> <hr/> <p>Powered by  Zapier <a href="#">Learn More →</a></p>	<p> <b>123 FORM BUILDER</b> <span>WEB FORMS</span></p> <h2>123 Form Builder</h2> <p>Automatically import user-submitted data from forms on your website as leads in your Pipeline CRM account.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>GRAVITY FORMS</b> <span>WEB FORMS</span></p> <h2>Gravity Forms</h2> <p>Automatically send user-submitted data from Gravity Forms on your website as leads in Pipeline CRM.</p> <hr/> <p>Powered by  Zapier <a href="#">Learn More →</a></p>
<p> <b>asana</b> <span>TASK MANAGEMENT</span></p> <h2>Asana</h2> <p>Automatically create tasks or projects in Asana based on moving the deal stage in Pipeline CRM</p> <hr/> <p>Powered by  Zapier <a href="#">Learn More →</a></p>	<p> <b>Google</b> <span>CONTACTS &amp; CALENDAR</span></p> <h2>Google Apps</h2> <p>Sync your Google Contacts and Calendar with your Pipeline Contacts and Calendar.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>Outlook</b> <span>CONTACTS &amp; CALENDAR</span></p> <h2>Outlook</h2> <p>Keep your Outlook email messages, contacts, and calendar events aligned with your Pipeline CRM.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>
<p> <b>Excel</b> <span>DATA MANAGEMENT</span></p> <h2>Excel</h2> <p>Export your leads and deals on demand to create custom dashboards for reporting.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>INTUIT mailchimp</b> <span>EMAIL MARKETING</span></p> <h2>Mailchimp</h2> <p>Connect Pipeline CRM contacts with email marketing campaigns in your Mailchimp account.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>Help Scout</b> <span>CUSTOMER SUPPORT</span></p> <h2>Help Scout</h2> <p>Sync details from your customer's profile to their Help Scout profile for enhanced customer experience.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>
<p> <b>import2</b> <span>DATA MANAGEMENT</span></p> <h2>Import2</h2> <p>Automate your initial data import from other CRMs, such as Zoho, Sugar, or Highrise.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>Userlike</b> <span>CUSTOMER SUPPORT</span></p> <h2>Userlike</h2> <p>Transfer your live chat transcripts and offline messages to your Pipeline account.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p> <b>formstack</b> <span>PROPOSALS &amp; CONTRACTS</span></p> <h2>formstack</h2> <p>Automate manual processes and drive efficiency with workflow software that can help you grow and adapt.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>

<p><b>paycove</b> PROPOSALS &amp; CONTRACTS</p> <h2>Paycove</h2> <p>Instantly send price quotes, estimates, and invoices from Pipeline when you move a deal forward.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>intuit quickbooks.</b> ACCOUNTING</p> <h2>QuickBooks</h2> <p>Give your accounts team early access to sales forecasts, share won deals with them, and generate invoices.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>ActiveDEMAND</b> MARKETING AUTOMATION</p> <h2>ActiveDemand</h2> <p>Align your sales and marketing teams by integrating your Pipeline account with marketing automation platform.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>
<p><b>CallRail</b> PHONE SOLUTIONS</p> <h2>CallRail</h2> <p>Capture all phone conversations with leads and customers using CallRail and attach notes to your Pipeline account.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>KIXIE</b> PHONE SOLUTIONS</p> <h2>Kixie</h2> <p>Log all sales calls with this enterprise phone service, through a two-way integration with Pipeline CRM.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>Finder.io</b> LEAD GENERATION</p> <h2>Finder.io</h2> <p>Find &amp; verify email addresses instantly, connect with key people for your business, and generate leads.</p> <hr/> <p><a href="#">Learn More →</a></p>
<p><b>zapier</b> INTEGRATION PLATFORMS</p> <h2>Zapier</h2> <p>Connect Pipeline to thousands of different apps, including WuFoo, LinkedIn, and Xero.</p> <hr/> <p><a href="#">Learn More →</a></p>	<p><b>Pabbly</b> INTEGRATION PLATFORMS</p> <h2>Pabbly Connect</h2> <p>Connect Pipeline CRM with more than 1,000+ apps. Just select the app and you're good to go.</p> <hr/> <p><a href="#">Learn More →</a></p>	<p><b>Trello</b> TASK MANAGEMENT</p> <h2>Trello</h2> <p>Automatically create cards or projects in Trello based on moving the deal stage in Pipeline CRM</p> <hr/> <p>Powered by  zapier <a href="#">Learn More →</a></p>
<p><b>zoominfo</b> DATA MANAGEMENT</p> <h2>ZoomInfo</h2> <p>Engage your next customer across channels with software powered by real-time insights and data</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>FullContact</b> DATA MANAGEMENT</p> <h2>FullContact</h2> <p>Access thousands of personal &amp; professional insights linked to billions of offline &amp; online identifiers.</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>	<p><b>UpLead</b> DATA MANAGEMENT</p> <h2>UpLead</h2> <p>Build prospecting lists free from dodgy data, bad-fit buyers and low-qualified leads. 95% Data Accuracy</p> <hr/> <p>Powered by  Pipeline <a href="#">Learn More →</a></p>










A promotional card for Clearbit integration. It features the Clearbit logo and a 'DATA MANAGEMENT' tag. The main heading is 'Clearbit'. Below it, the text reads: 'Enrich your records, reveal buying intent, and connect with your ideal customers.' At the bottom, it says 'Powered by Pipeline' with the Pipeline logo and a green 'Learn More' button with a right-pointing arrow.










[Pipelinecrm.com](https://pipelinecrm.com)

## Do more with Pipeline CRM integrations










Zapier lets you connect Pipeline CRM with thousands of the most popular apps, so you can automate your work and have more time for what matters most—no code required.

A grid of nine Zapier integration cards. Each card shows an app icon, the app name, and its category. A red arrow points to the Wufoo card.










 <b>Facebook Lead Ads</b> Ads & Conversion	 <b>Wufoo</b> Forms & Surveys	 <b>HubSpot</b> Marketing Automation
 <b>Google Sheets</b> Google, Spreadsheets	 <b>Formatter by Zapier</b> Documents, Zapier	 <b>Mailchimp</b> Email Newsletters
 <b>Webhooks by Zapier</b> Developer Tools, Zapier	 <b>SurveyMonkey</b> Forms & Surveys	 <b>Filter by Zapier</b> Developer Tools, Zapier










 <b>GoTo Webinar</b> Webinars	 <b>Gmail</b> Email, Google	 <b>ActiveCampaign</b> Marketing Automation
 <b>Email Parser by Zapier</b> Email, Zapier	 <b>Formstack Documents</b> Documents	 <b>Slack</b> Team Chat
 <b>Delay by Zapier</b> Developer Tools, Zapier	 <b>Workamajig</b> Project Management	 <b>Formstack</b> Forms & Surveys










  










 <b>Trello</b> Project Management	 <b>YouCanBook.Me</b> Scheduling & Booking	 <b>Google Drive</b> File Management & Storage,...
 <b>Smartsheet</b> Spreadsheets	 <b>Gravity Forms</b> Forms & Surveys, WordPress	 <b>Xero</b> Accounting
 <b>QuickBooks Online</b> Accounting	 <b>Docparser</b> Documents	 <b>Webflow</b> Website Builders










  

 <b>Google Calendar</b> Calendar, Google	 <b>Spotify</b> Team Collaboration	 <b>SharpSpring</b> Marketing Automation
 <b>Unbounce</b> Forms & Surveys	 <b>RingCentral</b> Phone & SMS	 <b>Typeform</b> Forms & Surveys
 <b>Acuity Scheduling</b> Scheduling & Booking	 <b>Asana</b> Project Management	 <b>LinkedIn</b> Microsoft, Social Media Acc...










 <b>Autopilot Journeys</b> Marketing Automation	 <b>WooCommerce</b> eCommerce, WordPress	 <b>Ninja Forms</b> Forms & Surveys, WordPress
 <b>Email by Zapier</b> Email, Zapier	 <b>Shopify</b> eCommerce	 <b>monday.com</b> Project Management
 <b>WPForms</b> Forms & Surveys, WordPress	 <b>Google Ads</b> Ads & Conversion, Google	 <b>Keap Max Classic</b> Marketing Automation










 <b>Google Contacts</b> Contact Management, Google	 <b>Intercom</b> Customer Support	 <b>Jotform</b> Forms & Surveys
 <b>Microsoft Outlook</b> Calendar, Email, Microsoft	 <b>CallRail</b> Call Tracking	 <b>Pipedrive</b> CRM (Customer Relationshi...
 <b>Microsoft Excel</b> Microsoft, Spreadsheets	 <b>MailerLite Classic</b> Email Newsletters	 <b>Google Analytics</b> Ads & Conversion, Google










 <b>Marketo</b> Marketing Automation	 <b>MySQL</b> Databases	 <b>Code by Zapier</b> Developer Tools, Zapier
 <b>Mailchimp Transactional</b> Transactional Email	 <b>Campaign Monitor</b> Email Newsletters	 <b>OnceHub</b> Scheduling & Booking
 <b>Dropbox</b> File Management & Storage	 <b>Schedule by Zapier</b> Scheduling & Booking, Zapier	 <b>Quick Base</b> Databases










 <b>Moxo</b> Team Collaboration	 <b>AWeber</b> Email Newsletters	 <b>ActiveCampaign Postmark</b> Transactional Email
 <b>Zoom</b> Video Conferencing	 <b>ClickFunnels</b> Marketing Automation	 <b>Dropbox Sign</b> Signatures
 <b>Cognito Forms</b> Forms & Surveys	 <b>123FormBuilder</b> Forms & Surveys	 <b>Basecamp 2</b> Project Management



















 <b>Airtable</b> Databases	 <b>BigCommerce</b> eCommerce	 <b>Zendesk</b> Customer Support
 <b>Twilio</b> Phone & SMS	 <b>Sendy</b> Email Newsletters	 <b>Evernote</b> Notes
 <b>Mojo</b> CRM (Customer Relationshi...	 <b>Brevo</b> Email Newsletters	 <b>Freshdesk</b> Customer Support

 <b>Leadpages</b> Forms & Surveys	 <b>Google Chat</b> Google, Team Chat	 <b>Seamless AI</b> AI Tools, Contact Managem...
 <b>Formidable Forms</b> Forms & Surveys, WordPress	 <b>Mailparser</b> Email	 <b>FileInvite</b> Documents
 <b>DocuSign</b> Signatures	 <b>Jobber</b> Scheduling & Booking	 <b>SMS by Zapier</b> Phone & SMS, Zapier

 <b>Clio</b> CRM (Customer Relationshi...	 <b>Wootric by InMoment</b> Forms & Surveys	 <b>Constant Contact</b> Email Newsletters
 <b>Instapage</b> Forms & Surveys	 <b>Myphoner</b> Call Tracking	 <b>Iemlist</b> Drip Emails
 <b>BombBomb.com</b> Drip Emails	 <b>Google Forms</b> Forms & Surveys, Google	 <b>Wrike</b> Project Management

 <b>Microsoft Exchange</b> Email, Microsoft	 <b>Zapier</b> Developer Tools, Zapier	 <b>GetResponse</b> Marketing Automation
 <b>Reply</b> Marketing Automation	 <b>RepCard</b> Sales & CRM	 <b>Apollo</b> Sales & CRM
 <b>Leadinfo</b> Marketing	 <b>Any.do Personal</b> Task Management	 <b>TextMagic SMS</b> Phone & SMS

 <b>Help Scout</b> Customer Support	 <b>Geckoboard</b> Dashboards	 <b>Calendly</b> Scheduling & Booking
 <b>Aloware</b> Phone & SMS	 <b>VirtualPBX</b> Call Tracking	 <b>Facebook Pages</b> Social Media Accounts
 <b>Magento</b> eCommerce	 <b>Paths by Zapier</b> Developer Tools, Zapier	 <b>Google Docs</b> Documents, Google

 <b>Paperform</b> Forms & Surveys	 <b>SignNow</b> Signatures	 <b>Verse</b> Sales & CRM
 <b>Kommo</b> CRM (Customer Relationshi...)	 <b>17hats</b> CRM (Customer Relationshi...)	
 <b>Pardot</b> Marketing Automation	 <b>SendJim</b> Marketing	

[Zapier.com](https://zapier.com)

# Implémentation : 9/10

This is an area where I feel people fall down in the process. First - spend time up front defining your organizational processes, and goals. Don't even think about a solution until you've spent time defining the process. We spent time with every facet of the organizational process, and defined a workflow and diagram of each key process. This allows you to determine where you can get some process automation (service-based automation) versus workflow (human eyeballs and decisions on a procedure). Out of this exercise you will definitely see the critical "must-have" features and functions in any solution, and frankly it's pretty easy from there. Most people start asking a bunch of questions, and they don't know what they're trying to answer. In addition, most organizations avoid this step because it's difficult. But it is essential and lays the groundwork for a successful project and a much, much easier deployment.

Pipeline Deals is a great resource to quickly implement a CRM. It is easy and fast to set up an account, import your data and start using it. Both basic and advanced users will value the tool. If you are looking for something extremely simple (like Highrise HQ), this may not be the best fit.

(Trustadius)



### What do you like best about Pipeline CRM?

The best part about this CRM is that it is affordable, easy to set up and use, the custom field works excellently, and the best part is the relationship between the company and deals . Moreover, it is a more comprehensive tool than Hubspot,

### What do you like best about Pipeline CRM?

Reasonably affordable and very easy to setup and use. Implemented quickly with very little assistance. Very intuitive to use. Custom fields work great and by far the best part of the product is the relationship between company, deal, and people records—far better than almost every other CRM I looked at. Makes reporting very strong. Also love the ability to do simple bulk personalized marketing email campaigns directly from the product. While the application lacks some functionality that we would like, it is very strong in other areas. Ease-of-use is a key benefit as is the intuitive way the system works. The core functionality and workflow mirrors our business very well. The addition of multiple sales cycles has been awesome. We don't use task assignment functionality but could be useful in the future. Reporting capability is also very strong with the ability to reconfigure reports with a few simple clicks. Also really appreciate the effort to update the product. New features are introduced at a steady rate. Lastly, customer support is always friendly and as helpful as they can be. Love working with this product—very often the application has the ability to do what I want to do, or easily create new fields that will accomodate our needs.

(G2)



## Deployment Region

North America	58%
Asia/Pacific	18%
Europe, Middle East and Africa	16%
Latin America	7%

([Gartner](#))

### CUSTOMER STORIES

## Make our tools work for you

Get a sales platform that offers easy **setup**, seamless integrations, and intuitive tools. Spend more time on closing deals, not on managing your CRM.

[Read Their Story](#)



**Marco Kristen,**  
Marketing Director at TENMAT

“Our sales went up 30% with the same amount of people and resources”

## CRM for Salespeople by Salespeople

A sales CRM platform that offers easy **setup**, integrations, customization, and intuitive tools. With Pipeline CRM software, you'll have everything you need to accelerate sales.

([Pipelinecrm](#))

## Business international :

International	Oui
National	Oui
N'importe	Oui

## Hébergement :

Cloud	Oui
On-Premise	Oui
SaaS	Oui
Hybride	Oui

## Développement spécifique :

Peu	Oui
Beaucoup	Oui

## Implémentation :

< 1 mois	Oui
1 à 6 mois	Oui
6 à 12 mois	Oui
> 12 mois	Oui

## Couverture fonctionnelle :

Gestion des contacts et des clients	Oui
Gestion des ventes	Oui
Automatisation des campagnes marketing	Non
Service client	Non
Analyse et rapports	Oui
Intégration avec les canaux de communication	Oui
Automatisation des tâches	Oui
Gestion de projet	Non

<b>Gestion de la prospection</b>	Non
<b>Personnalisation et segmentation</b>	Oui
<b>Gestion et confidentialité des données</b>	Oui
<b>Suivi de l'historique</b>	Oui

## Responsive :

Oui	Oui
-----	-----

# Rapport qualité /prix : 9/10

## Période d'essai :

Pipeline CRM propose une période d'essai gratuite de 14 jours. Cette période d'essai est accessible à tous les utilisateurs, sans limitation de fonctionnalités.

## Transparence :

Pipeline CRM met à disposition une page regroupant l'ensemble des tarifs de ses solutions. On trouve le détail de tous les prix.

## Prix : Pipeline crm propose 3 offres :

Start Plan	Develop	Grow
<b>\$25</b> per user/month, billed annually	<b>\$33</b> per user/month, billed annually	<b>\$49</b> per user/month, billed annually
A CRM that empowers smaller teams to manage leads effectively.	Accelerate real growth through customer relationship features and project management.	Automate processes and use advanced analytics and email solutions to grow your business.
<a href="#">→ 14-Day Free Trial</a>	<a href="#">→ 14-Day Free Trial</a>	<a href="#">→ 14-Day Free Trial</a>
No credit card required.	No credit card required.	No credit card required.
<b>Record Management</b> <ul style="list-style-type: none"><li>✓ 1 Sales Pipeline ⓘ</li><li>✓ People ⓘ</li><li>✓ 250 Deals per account (Active deals) ⓘ</li><li>✓ Companies/Customers ⓘ</li><li>✓ Unlimited file storage</li><li>✓ Deal and Activity reporting</li><li>✓ Import Data Excel or CSV</li><li>✓ 5 Exports per user per month</li><li>✓ 25 Custom Fields ⓘ</li><li>✓ Locked Fields</li><li>✓ Required Fields</li><li>✓ Conditional Fields ⓘ</li><li>✗ Conditional Formatting</li><li>✗ De-Duplication(people) Feature</li></ul>	<b>Record Management</b> <ul style="list-style-type: none"><li>✓ 2 Sales Pipelines ⓘ</li><li>✓ People ⓘ</li><li>✓ 2500 Deals per account (Active deals) ⓘ</li><li>✓ Companies/Customers ⓘ</li><li>✓ Unlimited file storage</li><li>✓ Deal and Activity reporting</li><li>✓ Import Data Excel or CSV</li><li>✓ Unlimited Exports per user per month</li><li>✓ 35 Custom Fields ⓘ</li><li>✓ Locked Fields</li><li>✓ Required Fields</li><li>✓ Conditional Fields ⓘ</li><li>✗ Conditional Formatting</li><li>✗ De-Duplication(people) Feature</li></ul>	<b>Record Management</b> <ul style="list-style-type: none"><li>✓ 5 Sales Pipelines ⓘ</li><li>✓ People ⓘ</li><li>✓ Unlimited Deals per account (Active deals) ⓘ</li><li>✓ Companies/Customers ⓘ</li><li>✓ Unlimited file storage</li><li>✓ Deal and Activity reporting</li><li>✓ Import Data Excel or CSV</li><li>✓ Unlimited Exports per user per month</li><li>✓ Unlimited Custom Fields ⓘ</li><li>✓ Locked Fields</li><li>✓ Required Fields</li><li>✓ Conditional Fields ⓘ</li><li>✓ Conditional Formatting</li><li>✓ De-Duplication(people) Feature</li></ul>

<p><b>Email Sync – Google, Microsoft</b> 365 ⓘ</p> <ul style="list-style-type: none"> <li>✓ 250 Email Trackings Per User ⓘ</li> <li>✗ Email Templates ⓘ</li> <li>✗ Bulk Emails ⓘ</li> <li>✗ Email Drip Campaigns ⓘ <b>NEW</b></li> </ul> <hr/> <p><b>Automation</b></p> <ul style="list-style-type: none"> <li>✓ 1 Automation ⓘ</li> <li>✓ Task Templates ⓘ</li> </ul> <hr/> <p><b>Goals and Reporting</b></p> <ul style="list-style-type: none"> <li>✓ Goal Dashboard - Team/Individual ⓘ</li> <li>✗ Performance Pulse ⓘ</li> <li>✗ Milestones ⓘ</li> <li>✗ Hindsight ⓘ</li> <li>✗ Deal Intelligence Fields ⓘ</li> </ul>	<p><b>Email Sync – Google, Microsoft</b> 365 ⓘ</p> <ul style="list-style-type: none"> <li>✓ Unlimited Email Trackings Per User ⓘ</li> <li>✗ Email Templates ⓘ</li> <li>✗ Bulk Emails ⓘ</li> <li>✗ Email Drip Campaigns ⓘ <b>NEW</b></li> </ul> <hr/> <p><b>Automation</b></p> <ul style="list-style-type: none"> <li>✓ 10 Automations ⓘ</li> <li>✓ Task Templates ⓘ</li> </ul> <hr/> <p><b>Goals and Reporting</b></p> <ul style="list-style-type: none"> <li>✓ Goal Dashboard - Team/Individual ⓘ</li> <li>✓ Performance Pulse ⓘ</li> <li>✓ Milestones ⓘ</li> <li>✗ Hindsight ⓘ</li> </ul>	<p><b>Email Sync – Google, Microsoft</b> 365 ⓘ</p> <ul style="list-style-type: none"> <li>✓ Unlimited Email Trackings Per User ⓘ</li> <li>✓ Email Templates ⓘ</li> <li>✓ Bulk Emails ⓘ</li> <li>✓ Email Drip Campaigns ⓘ <b>NEW</b></li> </ul> <hr/> <p><b>Automation</b></p> <ul style="list-style-type: none"> <li>✓ 20 Automations ⓘ</li> <li>✓ Task Templates ⓘ</li> </ul> <hr/> <p><b>Goals and Reporting</b></p> <ul style="list-style-type: none"> <li>✓ Goal Dashboard - Team/Individual ⓘ</li> <li>✓ Performance Pulse ⓘ</li> <li>✓ Milestones ⓘ</li> <li>✓ Hindsight ⓘ</li> </ul>
<p><b>Data Sharing</b></p> <ul style="list-style-type: none"> <li>✓ Share lists with internal users</li> <li>✗ Advanced Visibility ⓘ</li> <li>✗ Free Read only Users</li> <li>✗ SuperShare with External Partners ⓘ</li> <li>✓ SSO ⓘ</li> <li>✓ 1 Team ⓘ</li> </ul>	<p>✗ Deal Intelligence Fields ⓘ</p> <hr/> <p><b>Data Sharing</b></p> <ul style="list-style-type: none"> <li>✓ Share lists with internal users</li> <li>✗ Advanced Visibility ⓘ</li> <li>✓ 2 Free Read only Users</li> <li>✓ SuperShare with External Partners ⓘ</li> <li>✓ SSO ⓘ</li> <li>✓ 2 Teams ⓘ</li> </ul>	<p>✓ Deal Intelligence Fields ⓘ</p> <hr/> <p><b>Data Sharing</b></p> <ul style="list-style-type: none"> <li>✓ Share lists with internal users</li> <li>✓ Advanced Visibility ⓘ</li> <li>✓ 2 Free Read only Users</li> <li>✓ SuperShare with External Partners ⓘ</li> <li>✓ SSO ⓘ</li> <li>✓ Unlimited Team ⓘ</li> </ul>

[Pipelinecrm.com](https://Pipelinecrm.com)

Rapport qualité-prix ★ 4,4

Works well for the price

★★★★☆ 3,0 il y a 2 ans

**+ Avantages :**

PipelineDeals is a fairly full-featured CRM at a very reasonable price. While the interface can be a bit convoluted and reporting perhaps more complicated than necessary, the support team is very responsive and the development team seems to continually work on improvements and adding functionality.



Great **price**, desktop version is excellent, app needs some work

★★★★☆ 4,0 il y a 5 ans

**Commentaires :** Having used Salesforce.com in prior sales/marketing roles, it is hard to deny SF's dominance and superiority in the CRM space. However, it is equally hard to deny that SF is the highest **priced** solution available, especially when you factor in the investment of time and consultation fees required to tailor SF for your specific needs and preferences. Given this we began a diligent search through the CRM jungle to determine if there was a CRM solution that offered most of the same capabilities as SF "out of the box", for less money. Our matrix of candidates winnowed down very quickly to Pipeline Deals. PLD provided all of the SF type capabilities that we needed, such as email tracking, mass email tracking, account & deal history management, remote access via iPhone App, Deal stage tracking, customization, and excellent customer service. So, all of the attributes and capabilities that we admired about SF were present in PLD, but for much less money, and with a much easier set-up process, and with a much better and more accessible customer service team. PLD has been an exceptionally good CRM for our needs and expectations at a more competitive **price** point.

**+ Avantages :**

-Great support service, friendly, fast & effective -Easy to learn, it has a lot of potential to personalise it depending on the company needs -Great value for the **price**, specially if we compare it with other software, much more expensive and in which the learning time it is a bit longer

([Capterra.fr](https://www.capterra.fr))

**"EXCELLENT CRM with SALESFORCE CAPABILITIES at a REASONABLE **PRICE**"**

**What do you dislike about Pipeline CRM?**

I have no complaints but you will need to talk to my accounting dept regarding **price**. For something this good, pricing might be an issue.

★★★★☆ May 05, 2020 (Original May 21, 2019)

**"Fantastic CRM for the **price**"**

([G2](https://www.g2.com))

# Ancienneté de l'entreprise nombre de client, d'employés et chiffre d'affaire : 7/10

**Ancienneté de l'entreprise** : 2006.

**Chiffre d'affaires (Pipeline CRM)** : 20 millions de dollars en 2023 (Google bard)

**Nombre de clients / utilisateurs** : 18 000 clients dans 60 pays.

**Nombre d'employés** : 500 employés (Google bard)

## A bit about us

**Founded in 2006**, Pipeline is the most adopted sales enablement software for small and midsize businesses, empowering sales teams across industries to build game changing relationships.

Pipeline is built around an easy-to-use and customizable user experience, sales-focused features, and leading customer support and service. Today, more than 18,000 users in 60 countries use Pipeline to gain visibility into their sales pipeline to accelerate opportunities and close more deals. A 100% remote company, originally headquartered in Seattle, WA, Pipeline has made the annual Inc. 5000 list since 2014, recognized as one of the fastest growing companies in the U.S.



[Pipelinecrm.com](https://pipelinecrm.com)

## Maillage du territoire : 5/10

Pipeline CRM est une entreprise basée à Seattle, aux États-Unis, mais d'après la page de présentation de l'entreprise, ils n'ont pas d'autres bureaux dans le monde.

## Écosystème de partenaires : 5/10

### SG Partners Inspires Companies To Win With Pipeline CRM

Sales Consulting Industry | Pipeline CRM Partner

Australia based SG Partners remains a global leader in specialized organizational consulting, with Pipeline CRM as its preferred CRM offering for small and midsize businesses.

[Pipelinecrm.com](https://pipelinecrm.com)

### Pipeline CRM Partner Evergrowth Grows With Its Startup Clients

 evergrowth.io

Evergrowth

Vilnius, Lithuania

High-Tech Industry | Pipeline CRM Partner

Evergrowth accelerates B2B Software as a Service (SaaS) startups across Europe by helping sales and marketing teams develop predictable sales pipelines within a data-driven sales framework.

[Pipelinecrm.com](https://pipelinecrm.com)

## Support : 9/10

Service client

★ 4,4

**Commentaires :** The program is really not completely intuitive. This has not hurt us as our questions get answered whenever they arise by their **support** team. We are more successful with our business because of this program.

### + Avantages :

The BEST small biz sales relationship management tool we've used (7+ years now every single day) Very intuitive interface. Amazingly powerful API (if you want to code connect it to your own systems) Great customer **support** team (you talk to real people, in the real office) Extremely powerful list filtering and saved reports tools Constantly adding new features and enhancements to make it more powerful without more "clutter"

### + Avantages :

PipelineDeals is a fairly full-featured CRM at a very reasonable price. While the interface can be a bit convoluted and reporting perhaps more complicated than necessary, the **support** team is very responsive and the development team seems to continually work on improvements and adding functionality.

### - Inconvénients :

PipelineDeals REALLY needs easier options for finding and merging or eliminating duplicates. This functionality is sadly lacking in what is otherwise a fairly friendly and cost effective CRM, and has been missing since we began using the product several years ago. Discussions with **Support** Staff have not been fruitful in this being added to the development list.

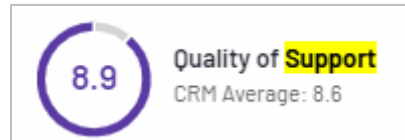
### + Avantages :

-The ability to create custom filters and tabs and then search for customers depending on those.  
-Ability to quickly add activities and then review status or import the entire thing to an excel sheet. -The **support** has been very helpful. When setting up our helpdesk on Freshdesk, we needed all our deals and data organized for us. Pipeline deals **support** helped us on getting the data in the right format and at the right time.

### - Inconvénients :

Integration with third-party applications and software is minimal, **support** is unfortunately only localised in the US so international clients will have significant delays in customer service. Automation is also severely limited, forcing users to be very manually focused in their day to day tasks where other service providers have the ability to automate menial tasks through the platform to increase the time spent on productive work.

([Capterra.fr](https://www.capterra.fr))

**What problems is Pipeline CRM solving and how is that benefiting you?**

It is ideal for organizing everything in chronological order and for efficiently managing the views, it has excellent integration with MailChimp and QuickBooks, it is a very flexible software, it works very well with Excel, it is a versatile software that allows me to manage my contacts, calendars, emails electronics and sales in an optimal and friendly way, they also have a first-rate **customer service**.

**What problems is Pipeline CRM solving and how is that benefiting you?**

I love that I have total control of everything, it allows me to restrict or give access to users, I like that I can maintain a chronological order of all conversations and notes, it will enable me to be very organized, it perfectly organizes the sales flow, the Customer **service** is optimal, I like the reminder system, I like that I can really create and customize the fields for clients, companies or offers, I really like the "Offers" section.

**What do you like best about Pipeline CRM?**

Unlimited custom fields

Great **customer service**

Ability to move custom fields on individual user pages

**What do you like best about Pipeline CRM?**

Good person to person **customer service**..

**What do you like best about Pipeline CRM?**

This platform is an optimal CRM for the growth of medium-sized companies, its tools and functions are based on helping to make sales and provide the best **customer service**. You will be able to track and obtain the information about what really drives your business, the integration with email and calendar is great and allows you to have a greater reach of clients, organization and time management.

**Recommendations to others considering Pipeline CRM:**

Stop here before looking into other larger name CRM systems. This does the job just as well (if not better) and has far superior support and **customer service**!

(G2)

### Customer Service & Support

This component of CRM software automates help desk, call center and field service management.



> [Show Features](#)

⊖ I wouldn't say no areas for improvement exist, but I will say that PipelineDeals takes customer input, shared product roadmap, and **supports** what they have very nicely. What they provide works out-of-the-box. Improvements can always be made with respect to pre-packaged integration with 3rd party services/solutions, and with extended attributes, but you also want to avoid something that attempts to boil the ocean.

([Trustradius.com](https://www.trustradius.com))

### Service & Support

4.7



4.0 ★★★★★ May 1, 2019

Review Source: ⓘ

### Perfect for Pre-Sales, Post-Sales and Customer **Support**

Pipeline has been very responsive to all of your inquiries and great customer **support**. The product is not complex and very easy to use. It may not have all of the bells and whistles of bigger CRMs - but it does the job.

**User **support** great, further development needs to address**

Pipeline has the best **support** team. They are always available to jump on a web-ex and walk us through any questions.

([Gartner.com](https://www.gartner.com))

## RSE : 6/10

### Bard :

« Pipeline CRM s'engage dans la RSE, notamment dans les domaines de l'environnement et de l'égalité des sexes.

### L'environnement

Pipeline CRM s'engage à réduire son impact environnemental. L'entreprise a mis en place une politique de développement durable qui vise à :

- Réduire la consommation d'énergie et de ressources
- Favoriser l'utilisation de matériaux recyclés et recyclables
- Sensibiliser ses collaborateurs aux enjeux environnementaux

### Pour atteindre ces objectifs, Pipeline CRM a pris les mesures suivantes :

- Installation de panneaux solaires sur les toits de ses bureaux
- Utilisation de produits éco-responsables
- Mise en place d'un programme de recyclage et de compostage

### L'égalité des sexes

Pipeline CRM s'engage à promouvoir l'égalité des sexes dans le monde du travail. L'entreprise a mis en place une politique d'égalité des chances qui vise à :

- Favoriser l'égalité de rémunération entre hommes et femmes
- Encourager la diversité des profils au sein de l'entreprise
- Promouvoir le développement professionnel des femmes

### Pour atteindre ces objectifs, Pipeline CRM a pris les mesures suivantes :

- Mise en place d'un plan d'égalité salariale
- Mise en place d'un programme de sensibilisation à l'égalité des sexes
- Mise en place d'un réseau de femmes au sein de l'entreprise

En 2023, Pipeline CRM a publié son premier rapport de RSE. Ce rapport présente les actions menées par l'entreprise dans les domaines de l'environnement et de l'égalité des sexes.



Concernant la différence des sexes dans le monde du travail, Pipeline CRM a une répartition équilibrée des hommes et des femmes au sein de ses effectifs. En 2023, les femmes représentent 45 % des effectifs de l'entreprise.

L'entreprise s'engage à poursuivre ses efforts pour promouvoir l'égalité des sexes dans le monde du travail. »

## Ressource à disposition : 6/10

Ressources	Oui / Non	Commentaires
Forum / communauté clients	Non	
Livres blancs, infographies, études	Oui	<a href="#">Source</a>
Tutoriels et formations	Non	
Blog	Oui	<a href="#">Source</a>
Webinaires, vidéos	Oui	<a href="#">Source</a>
Témoignages clients	Non	
Études de cas	Oui	<a href="#">Source</a>
Démonstrations	Oui	<a href="#">Source</a>
Si autre, préciser	<a href="#">affiliates</a>	

## Notoriété : 7/10

### Notoriété de l'éditeur :

Pipeline CRM, bien que moins connu que certains de ses concurrents établis, offre une gamme d'avantages précieux pour la gestion des relations client. Bien que moins médiatisé, il mérite d'être pris en considération pour les entreprises à la recherche d'une solution CRM efficace et évolutive.

### Notoriété de la solution :

- **Nombre de résultats** : 21 000 000 résultats (Pipeline CRM sur Google)
- **Popularité dans les sites spécialisés** : Pipeline CRM est bien connu dans l'industrie du CRM. Il bénéficie d'une présence croissante sur des sites spécialisés renommés, recueillant des centaines d'avis positifs. Sur les plateformes d'évaluation, Pipeline CRM affiche une moyenne de 4,3/5, ce qui témoigne de la satisfaction des utilisateurs. Il est également mentionné et évalué dans des études de renom telles que le Magic Quadrant de Gartner, l'IDC Marketscape et Forrester, ce qui souligne son statut de leader émergent dans le paysage concurrentiel du CRM.
- **Nombre de clients** : 18000 clients dans 60 pays.
- **Trafic sur le site web (données [Similarweb](#))** : 165.6K de visiteurs (september 2023).

# Compatibilité :

SECTEUR D'ACTIVITÉ	Nom	Chiffre d'Affaire	Activité	Nombre d'employés	Pays du siège	
Services	<a href="#">PremCom</a>	\$16.5M	conseil et de développement en informatique	37 Employees	United States	
	<a href="#">8th Light</a>	\$30.7M	entreprise de conseil en technologie	150 Employees	United States	
	<a href="#">Jacksonville Sharks</a>	\$6.6M	service de divertissement aux fans de football américain.	35 Employees	United States	
	<a href="#">Edurep</a>	\$1.0M	Professional Services	10	United States	
	<a href="#">David Creation</a>	<\$5M	fabrication de meubles et d'industries connexes de l'ameublement.	<25 Employees	United States	
Production industrielle	<a href="#">Wire Stone</a>	4 millions d'euros	fabrication de fils et de câbles.	6 employees.	France	
	<a href="#">TENMAT</a>	<\$5M	fabrication de pièces métalliques.	<25 Employees	United States	
	<a href="#">MGECOM</a>	<\$5M	services de téléphonie, d'Internet et de télévision par câble.	<25 Employees	United States	
	<a href="#">MaxSold</a>	\$98.3M	services de téléphonie, d'Internet et de télévision par câble.	496 Employees	Canada	
	<a href="#">Webfoot Painting</a>	\$14.1 Million	entreprise de construction spécialisée dans la peinture et la rénovation.	45	United States	
Construction	<a href="#">Vermeer Southeast</a>	\$45.2M	loue des machines et des équipements de construction.	70 Employees	United States	
	<a href="#">Rainier Custom Homes</a>	<\$5M	entreprise de construction de maisons sur mesure	<25 Employees	United States	
	<a href="#">WLS Companies</a>	\$12.7M	construction de routes, d'autoroutes, de bâtiments et de systèmes d'éclairage.	44 Employees	United States	
	<a href="#">The Garland Company</a>	\$738.2M	construction de maisons, d'immeubles de bureaux, de centres commerciaux	1,269 Employees	United States	
	<a href="#">Cornerstone Flooring</a>	\$75.1M	services de revêtement de sol	89 Employees	United States	
	<a href="#">Bay Area Underpinning</a>	\$15M	services de soutènement pour les bâtiments et les infrastructures.	67 Employees	United States	
	<a href="#">Reno Renovations</a>	5 millions de dollars	services de rénovation pour les bâtiments résidentiels et commerciaux.	50	Québec	
	<a href="#">1st Commercial Lending</a>	\$1.0M	Construction and Real Estate	10	United States	
	Distribution	<a href="#">Carolina Thomas</a>	\$15M	vend et loue des bus scolaires et de loisirs.	60 Employees	United States
		<a href="#">BeanoVision Productions</a>	\$7.0M	Banking and Financial Services	65	United States
Activités financières						
Énergie	<a href="#">SunX Solar</a>	\$5.5M	fabrication de panneaux solaires.	<25 Employees	United States	
Transport - logistique	<a href="#">VRS Trucking</a>	<\$5M	L'entreprise fournit des services de transport de marchandises par camion.	<25 Employees	United States	
	<a href="#">GlobalTranz</a>	\$4.9B	transport de marchandises, la gestion de la chaîne d'approvisionnement et la logistique contractuelle.	2,400 Employees	United States	
	<a href="#">Trailer Bridge</a>	\$93.1M	entreprise de transport maritime	285 Employees	United States	
	<a href="#">PACE</a>	100 millions d'euros	des solutions de livraison aux entreprises	1 000	France	
	<a href="#">StockPKG</a>	<\$5M	fournit des services de stockage et de logistique	<25 Employees	United States	
	<a href="#">VRS Trucking</a>	<\$5M	L'entreprise fournit des services de transport de marchandises par camion.	<25 Employees	United States	
TAILLE						
	0 à 2M	<a href="#">1st Commercial Lending</a>	\$1.0M	Construction and Real Estate	10	United States
		<a href="#">Edurep</a>	\$1.0M	Professional Services	10	United States
	2 à 10M	<a href="#">StockPKG</a>	<\$5M	fournit des services de stockage et de logistique	<25 Employees	United States
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> 1mrd	<a href="#">GlobalTranz</a>	\$4.9B	transport de marchandises, la gestion de la chaîne d'approvisionnement et la logistique contractuelle.	2,400 Employees	United States	

(Rapport de références)

## Sales Consulting Industry | Pipeline CRM Partner

Australia based SG Partners remains a global leader in specialized organizational consulting, with Pipeline CRM as its preferred CRM offering for small and midsize businesses.

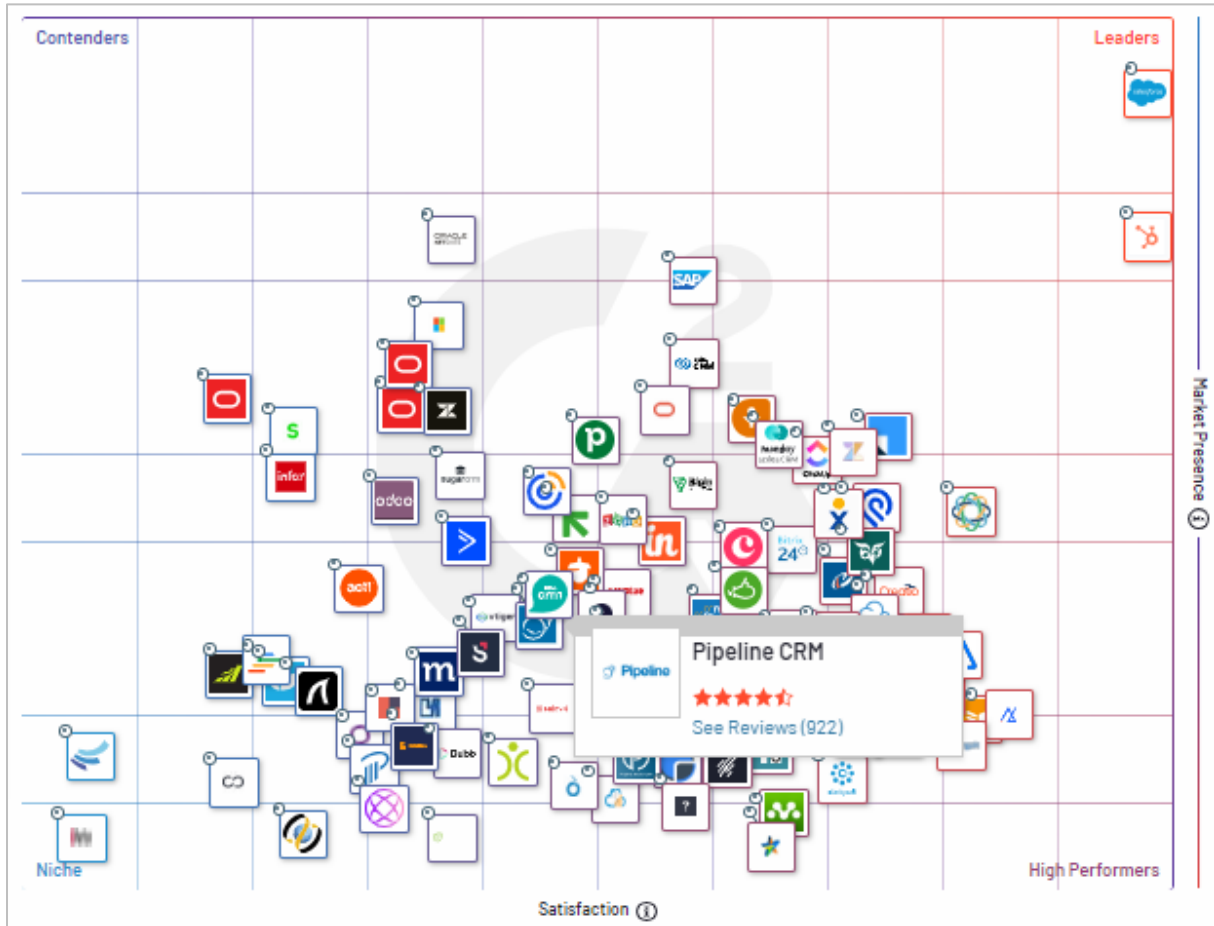
[Pipelinecrm.com](http://Pipelinecrm.com)

Services	8
Production industrielle	8
Distribution	8
Activités financières	8
Gouvernements et ONG	8
Énergie	8
Transport et logistique	8
Construction	8
Aérospatial et défense	8

0 à 2 millions d'€	9
2 à 10 millions d'€	10
10 à 50 millions d'€	8
50 à 200 millions d'€	0
200 millions à 1 milliard d'€	0
Plus d'1 milliard d'€	0

# Positionnement : 6/10

Positionnement de la solution:



(G2)

### Positionnement de l'éditeur:



[Pinterest.com](https://www.pinterest.com)



[Pipelinersales.com](http://Pipelinersales.com)