

Insightly vs. Venntive: The Deep-Dive

For revenue teams — sales and marketing alike — evaluating Insightly against a unified Revenue Architecture

1. What Insightly Actually Costs a 10-Person Professional Services Team

Insightly's \$29/user/month entry tier is real, but it blocks workflow automation and custom objects — most teams need Professional at \$49/user/month just to get functional automation. From there, marketing and integration depth are separate paid products, not included features.

Line Item	Details	Annual Cost
CRM Professional	\$49/seat/month × 10 seats, billed annually	\$5,880
Insightly Marketing	Professional tier, ~\$499–599/month for 10k contacts — a separate product, not included in CRM	\$6,000–\$7,200
AppConnect (integrations)	\$249–\$1,899/month depending on tier, plus a one-time setup fee	\$3,000+ (mo.) + ~\$3,000 setup
Onboarding/Premier Support	\$1,500 onboarding fee; Premier Support runs a \$3,000/year minimum on bundles	\$4,500
Insightly Year One Total	Realistic cost once marketing, integrations, and support are functional — not the \$29 headline	~\$16,000–\$20,000+
Venntive Grow Plan — Year One	7,500 contacts included. 2 seats included. \$50/mo per additional user. All features, no paywalls, no separate marketing product or integration platform to buy.	\$6,000 — all in.

For most professional services firms, the \$29 sticker price is the wrong number to budget against — it's a CRM without automation, without marketing, and without meaningful integration depth. Venntive's Grow plan is \$6,000 all in, with marketing and automation built into the same platform rather than sold as an add-on product.

2. Three Products Sharing a Database, Not One System

To Insightly's credit, its core idea is genuinely useful for professional services: linking CRM records directly to post-sale projects, so a deal tracks through close and into delivery without switching tools, is a real differentiator against pure sales CRMs like Pipedrive. Kanban and Gantt views for project tracking are a legitimate strength.

The differentiator isn't unique to Insightly, though. Venntive's own Project Manager (under Apps > Projects) competes directly with Jira and Asana — task assignment, timeline graphs, project updates, automatic weekly digests, and deadlines that post straight to the Venntive calendar — running natively inside the same database as the Contact, Company, and Deal record. Where Insightly needs a separate product (and a separate bill) to connect CRM to delivery, Venntive never separated them in the first place.

Beyond project delivery, CRM, Marketing, and Service are sold and run at Insightly as separate products that share a database — not one unified interface. Reviewers confirm this directly: reporting is repeatedly named as the weakest point (“built-in reports felt pretty limited... I usually ended up exporting to Excel and building it myself”), and there is no email sequencing on any plan, at any price — a notable omission for a platform positioning itself as a full revenue system. AppConnect, Insightly's integration layer, is powerful but reviewers describe it as more complexity than most small teams actually need, with limited support when something breaks.

Your revenue team finally stops arguing about whose numbers are right.

That trust problem shows up in a specific, practical way at Insightly: when reporting requires exporting to Excel to get a real answer, the CRM was never the single source of truth to begin with — the spreadsheet is.

Insightly: Three Products, One Database	Venntive: One Platform, One Logic
CRM, Marketing, and Service are separate paid products with separate interfaces	One platform — CRM, email, pipeline, contacts, analytics, one logic throughout
Project delivery requires the CRM linking to post-sale projects as its core differentiator	Project Manager (Apps > Projects) competes with Jira/Asana natively — tasks, timelines, and updates live in the same database as the deal
No email sequencing on any plan — outbound email isn't captured or sequenced inside the system of record at all	All communications tracked, including external email via IMAP — sequencing and audit trail live in the same record
Reporting repeatedly named the weakest feature; reviewers export to Excel for real analysis	One true source of truth — no reconciling reports back into a spreadsheet
AppConnect integration platform adds real cost and complexity most small teams don't need	Robust API and native Zapier integration included, MCP launching soon
Support quality inconsistent — 2.1/5 on Trustpilot, unresponsive-support complaints on G2	Direct, consistent access to support
Full functionality requires stacking Professional + Marketing + AppConnect + Premier Support	Nothing paywalled or metered — full feature set, one flat cost

3. A Real Strength, Fairly Credited — With a Gap That Matters

To be fair to Insightly: SOC 2 Type II, GDPR, and HIPAA compliance are genuine, documented credentials — for healthcare-adjacent, financial, and consulting firms with real compliance requirements, that's a meaningful, verifiable strength, not just a features-page claim.

Standard	Insightly	Venntive
Compliance certification	SOC 2 Type II, GDPR, HIPAA — genuine and documented	Data security is a first-class design principle across the platform
Communications audit trail	No email sequencing on any plan — outbound email activity isn't natively captured, a real gap for firms whose compliance need is precisely a complete communications record	All communications tracked, including external accounts via IMAP — nothing missing from the record
Reporting/analytics	Repeatedly cited as the weakest feature; manual Excel export common	One number for pipeline, commit, and revenue — no reconciliation step
Integration cost	AppConnect: \$249–\$1,899/month plus setup fee for real workflow depth	Zapier and API included; MCP launching soon
Support consistency	2.1/5 Trustpilot; reviewers report unanswered support tickets	Direct access, no tiered support model
Data portability	Export available; architecture spans three separate products	Your data, fully portable, always

For most professional services firms, one unified platform without a separate marketing product, integration platform, and support tier to manage is the better fit. The compliance certifications are real, but they only cover part of the picture — a firm that needs HIPAA or SOC 2 compliance almost always needs a complete communications trail too, and Insightly's missing email sequencing means outbound email activity isn't natively captured in that record. The exception is narrow: firms that need Insightly's specific certifications today and can layer in a separate tool to close the email-tracking gap may

find that trade-off worth it.

4. The Switching Cost Question

Step	What It Means in Practice
Data migration	Contacts and projects export cleanly; complexity rises with how much AppConnect workflow logic has been layered on
Product consolidation	Moving from CRM + Marketing + Service + AppConnect to one platform removes three separate bills and interfaces, not just one
Team onboarding	Reviewers report months to get fully comfortable with Insightly's customization options; Venntive's no-code setup is designed to avoid that curve
Integration setup	Venntive's Zapier connector and API mean existing tool connections migrate without AppConnect's setup fee or monthly cost
Ongoing support	Direct, consistent access — no Premier Support tier required to get responsive help

5. Who Insightly Is Actually Built For — and Who Venntive Is Actually Built For

Who Insightly Is Actually Built For	Who Venntive Is Actually Built For
Agencies and consultancies specifically comfortable managing CRM, marketing, and project delivery as separate connected products	Owner-operated B2B firms — startup through enterprise — that want CRM and project delivery native to one platform, not three connected products
Firms with hard HIPAA/SOC 2 requirements today, willing to manage multiple products to get there	Professional services, financial services, and healthcare-adjacent firms that want compliance and simplicity together
Teams comfortable exporting to Excel for real reporting	Teams that want one trusted number without a spreadsheet step
Organizations willing to budget \$16K–\$20K+ once marketing and integrations are added	Firms that want \$6,000 all in, with marketing and automation included
Teams that don't need email sequencing as a core function	Revenue teams that need sequencing, sales, and marketing running as one system

For most professional services and owner-operated B2B firms, Venntive is the stronger choice: one platform instead of three connected products, sequencing and marketing included rather than sold separately, and a flat \$6,000 instead of a \$29 sticker price that becomes \$16K–\$20K in practice. The exception is narrow: firms with immediate, documented HIPAA or SOC 2 requirements who are willing to manage Insightly's multi-product structure to get there today may find that trade-off worth making.

Ready to see what a platform built around your business actually looks like?

Free for 7 days — no credit card, no onboarding fee, no sales pressure. venntive.com

This comparison was generated using AI based on publicly available pricing and product information and verified user reviews as of July 2026. Insightly pricing varies by configuration, negotiated discounts, and add-on modules; the cost example represents a typical 10-person professional services team scenario and is provided for illustrative purposes. | venntive.com | Less friction. More business.