Pipedrive vs. Trello: Which kanban board software is right for you?

Are you a fan of kanban-style task management features to visualize workflows and customer leads? If so, two project management tools lead the fray — Pipedrive and Trello. Both rely on kanban cards as their primary visualization tool, making them both incredibly user-friendly and approachable.

From assigning and monitoring task progress to customer relationship management, both Pipeline and Trello offer unique advantages for both. Yet, due to their inherent similarities, it can be a tad difficult to determine which project management software will best suit your company's needs. Which you end up going with will depend on a few factors, including:

- Key features

- Pricing

- Integrations

- User experience

- Automation capabilities

To help you with your decision, we've put together this comparison guide pitting Pipedrive vs. Trello. We'll compare and contrast each deciding factor to help you determine which software you need to implement at your business.

While both programs have some inherent similarities, they are two different types of software that serve different functions. Trello is a project management software primarily used for task management, as it uses a kanban board and cards to represent projects, tasks, and assignees. Pipedrive is a CRM (customer relationship management) software aimed at directing leads through your sales pipeline. It uses a similar visualization style (kanban cards) as Trello, but its primary purpose is different.

Yet, Trello can also double as CRM software, and some companies use Pipedrive to manage projects, which is why the programs are often lumped together in the same category.

Without further ado, read on to discover who's victorious in the matchup Pipedrive vs. Trello.

What is Pipedrive?

Pipedrive is an innovative cloud-based CRM software that allows you to visualize your entire sales process at a glance. The stages of the pipeline are visualized as cards (referred to as deals) on a kanban board. Users can import deals from their computers or build new deals from scratch.

The program uses a simple drag-and-drop interface to move deals around, update deals, and add new deals to the board. It's a straightforward user interface, meaning anyone can pick up and start using it without much training.

Pipedrive also sends automatic alerts and reminders to keep you in the loop whenever there's an update. Your sales forecasts will also update every time you move a deal down the funnel.

You can also segment your leads by using filtering, segmenting, and categorization tools. That way, your salespeople will know which leads are gaining the most traction with a single glance at the board. You can also create targeted lead lists to engage in personalized communications with clients.

Pipedrive's lead booster add-on

To capture even more leads, Pipedrive has a lead generation toolset that includes the following:

- **A chatbot**. Automatically engage with your leads 24/7. It also has the capability to route leads to sales reps, which is a plus.

- **Live chat**. Besides the chatbot, you have the option of switching to live chat on the fly.

- **Prospector**. This tool contains a database of 400 million profiles you can use to find new leads.

- **Embeddable web forms**. You can easily embed surveys and other forms to increase lead generation on your web pages.

While these features are indeed impressive, they don't come as part of any standard Pipedrive plan. Instead, you'll need to pay an additional $32.50 a month per company — which may go over budget for some (especially small businesses and startups).

Yet, if you do have the extra money, there's no denying that these extra features are helpful for generating more leads.

Web visitors add-on

Another add-on offered by Pipedrive is web visitors — a tracker that will allow you to monitor the visitors to your website.

Besides letting you know who's browsing your content, the add-on automatically ranks each lead based on their activity — so you'll know which leads show the most potential. You can also customize how it ranks leads, including by:

- Country

- AdWords campaign

- Webpage interaction

This additional flexibility ensures you'll be able to rank your leads the way you want. For instance, you may want to only focus on leads from a specific geographic area, which is where the country filter comes into play.

Like the lead booster, this add-on isn't free (although you can try it out free as part of your 14-day Pipedrive free trial).

The pricing is a tad different, as it's based on the number of identifiable organizations that the app picks up on.

Here's the breakdown:

- 200 identified organizations: $49 per month (0.25 per organization)

- 201 to 500 organizations: $99 per month (0.20 per organization)

- 501 to 2,000 organizations: $299 per month (0.15 per organization)

If your company has the additional funds, being able to track web users is a desirable feature — albeit an expensive one.

What is Trello?

Trello is a dedicated project management software that uses a kanban board for projects, columns for phases, and cards to visualize projects and tasks. It's a cloud-based platform, so your team can access it from anywhere. The Trello board allows for team collaboration, customizable task management, and superior time management.

While boards, columns, and cards are the bread and butter of the application, Trello also makes use of:

- Task assignments

- A timeline view for planning projects

- Productivity metrics

- A calendar view for better time management

- Automation

- A table view to connect work across multiple boards

Trello is a favorite amongst small businesses, startups, and freelancers. It's the ideal tool for keeping track of projects handled by small teams. While it's entirely possible to manage larger teams with Trello, many companies opt for other project management tools, such as Asana.

Yet, companies love Trello due to its simplicity, amazing customer support, and ease of use. You can pick up Trello and start using it without viewing a single tutorial, which is a testament to its intuitive user interface.

Trello cards

Trello cards are the heart and soul of the program, and their features and capabilities are pretty robust.

A Trello card is more akin to a living ecosystem than something static.

Each card can contain a wide variety of:

- Checklists

- Due dates

- Attachments

- Conversations

Cards are also quite versatile in what they can represent. Besides concrete tasks, cards can also represent ideas and policies. For instance, you could create a card for a blog post that needs writing, including the deadline, assignee, attachments (such as a style guide or other requirements), and more. Or you could create a card for crucial company policies that you don't want anyone to forget. Both are perfectly viable uses for cards, so don't limit them only to represent tasks.

Pipedrive vs. Trello: Similarities and differences

While Pipedrive and Trello differ in their business functions, they do bear many similarities. Both platforms use kanban boards as their primary tool to visualize workflows, which is why they're both so user-friendly.

They also both feature workflow automation capabilities that allow you to automate repetitive tasks. Both Trello and Pipedrive enable users to create custom fields to trigger numerous workflow tasks, such as setting up personalized emails to send whenever you create a new deal.

Their primary difference lies in the audiences they appeal to. Pipedrive is a favorite of sales teams, and Trello is favored by smaller teams and businesses (freelancers also). Sales managers will appreciate Pipedrive's ability to create email marketing campaigns, while Trello freelancers love its calendar view to stay on top of their daily tasks.

Now let's directly compare Pipedrive vs. Trello in terms of:

- Features

- Automation

- Integrations

- Pricing

By the end, you should know which platform best suits your needs.

Primary features

First, let's take an in-depth look at the primary features of both Pipedrive and Trello to see which platform provides the most value in their base plan.

Pipedrive's features

Due to its nature, Pipedrive contains more features geared toward perfecting your sales cycle, including:

- **Visualized sales pipeline.** You'll get to see all your leads and deals in one convenient location. The simple drag-and-drop controls make it effortless to update deals and progress them further down the sales funnel.

- **Team collaboration.** You can work on deals with colleagues straight from Pipedrive, whether you're located in the same place or not. It's a great way to share updates and wins with your coworkers.

- **Activity reminders.** You can schedule automated reminders, so you never forget about your sales activities.

- **Lead segmentation**. One of Pipedrive's most helpful CRM features is the ability to segment leads based on a number of factors.

- **In-depth contact history.** For each lead, you'll be able to view your complete history of notes, calls, emails, and meetings in one convenient location. That makes it effortless for someone new to come in on a deal, as they can check the contact history to learn everything they need to know about a lead.

- **Revenue forecasting.** Pipedrive will automatically forecast future revenue and sales volume based on your pipeline, saving you the trouble of having to do so yourself. Every time you update a deal, the forecasting will also update.

- **Detailed reporting and analytics.** The Pipedrive Insightsdashboard contains many helpful sales reports that your team members can use to identify winning patterns.

As you can see, Pipedrive comes with a ton of helpful CRM features but doesn't offer much in the way of sheer project management.

Yet, its Essential plan includes all these features, which is an incredible deal.

Trello's features

Trello is, by nature, a straightforward tool, which is part of its appeal to its user base. Here's an overview of its main features:

- **Trello boards.** In seconds, you can set up a Trello board (representing a project). Its columns represent the stages of the project, and Trello cards represent tasks or ideas. It's a simple yet highly effective way to visualize workflows.

- **Multiple board views.** With Trello, you can view your board in various ways. Besides the board view, there's also a *calendar view*, *table view*, and *timeline view* for an efficiency boost.

- **No-code automation.** Trello allows users to automate repetitive tasks with Butler, its built-in automation assistant.

- **Trello cards.** Cards are especially versatile in Trello, as they can contain attachments, checklists, conversations, due dates, and more.

- **Templates.** To make things even easier for new users, Trello offers templates that allow you to get started in seconds. Templates come from both Trello and third parties, so a wide variety of them are available.

- **Trello power-ups.** Trello's power-ups are a bit of a double-edged sword. They're fantastic in that they add new capabilities to Trello, including Crmble, a CRM power-up. Yet, not all power-ups come from the Trello team, and the quality of third-party power-ups can be questionable at times.

Trello is by far the simpler tool of the two, but that's not necessarily a bad thing. If you want to manage projects amongst your team, Trello is the way to go.

Still, it's hard to deny that Pipedrive offers more robust features in its base plan, so it takes this round.

Winner: Pipedrive

Automation

Now let's take a closer look at the automation capabilities of both platforms.

Pipedrive automation

Pipedrive allows users to set triggers and assign them to preset actions to automate tasks.

How does this work?

Let's consider an example. Say that you want to notify your sales manager whenever a deal gets completed automatically. In this scenario, the trigger would be whenever a deal gets added to the 'won' section, and the

action would be to notify the sales manager. By assigning the task to the trigger, emails will begin sending to your sales manager, notifying them of completed deals.

That's how easy it is to automate tasks with Pipedrive, which is a plus.

Trello automation

Trello's automated features work very much in the same way. You can also assign actions to triggers to automate mundane tasks to save time.

Yet, Trello takes things a bit further with its built-in automation assistant, Butler.

It's an AI-driven assistant that observes your actions on Trello boards at all times. Along the way, it identifies repetitive tasks you could automate and notifies you. That's especially handy because it can point out tasks you can automate that you may have missed otherwise.

For this reason alone, Trello takes the cake in terms of automation.

Winner: Trello

Integrations

Next, let's take a look at the applications and platforms that Pipedrive and Trello integrate with to see if they can mesh with your existing workflows.

Pipedrive's integrations

Pipedrive undoubtedly leads the fray in this regard, as it integrates with <u>over 350 apps</u>, including:

- Zoom

- Asana

- Zapier

- Hubspot

- Slack

- Salesforce

- Google Drive

- Trello (that's right, you can integrate Pipedrive with Trello for the best of both worlds)

- Many others

With all the integrations, Pipedrive is bound to fit into your business workflows with ease.

Trello's integrations

While Trello can't compare with Pipedrive's 350+ integrations, it's still no slouch — with over 200 of its own.

There are integrations for campaign management, email, internal collaboration, reporting, and document management.

Integrations include:

- Microsoft Teams

- Gmail

- Slack

- Mailchimp

- Google Drive

- Evernote

Still, there's no denying that Pipedrive knocks this round out of the park.

Winner: Pipedrive

Pricing

Now let's take a look at the pricing plans of each. Right off the bat, Trello has a noticeable advantage since it has a **totally free version you can use**. Pipedrive has a 14-day free trial, but after it runs out, you'll have to purchase the Essential plan at least.

Pipedrive pricing

Here's an overview of the Pipedrive pricing plans:

- **Essential.** Coming in at $14.90 per month (per user), Pipedrive's essential plan yields you 3,000 active deals, 30 custom fields, and 15 reports.

- **Advanced.** At $24.90 per month (per user), you get 10,000 active deals, 100 custom fields, and 30 reports.

- **Professional**. At $49.90 per month (per user), you get 100,000 active deals, 1,000 custom fields, and 150 reports.

- **Enterprise**. At $99 per month (billed annually), you get unlimited active deals, unlimited custom fields, and unlimited reports. You also get unlimited user permissions, making this an ideal choice for larger organizations.

While there's no free version, the Essential plan is affordable and comes with an impressive number of features.

Trello Pricing

Here's an overview of Trello's pricing:

- **Free version**. The free version still contains a ton of features, such as unlimited cards and unlimited storage.

- **Standard**. At $5 a month, you get custom fields, advanced checklists, and 1,000 workspace commands per month.

- **Premium**. At $10 a month, you get additional board views, unlimited workspace command runs, admin security features, and more.

- **Enterprise**. At $17.50 a month, you get unlimited workspaces, multi-board guests, attachment permissions, and more.

In addition to its fantastic free version, nearly every Trello pricing plan is cheaper than Pipedrive, making it the clear winner for this round.

Winner: Trello

Final Thoughts: Pipedrive vs. Trello

It's been a long, complex comparison, but there must be a winner. While both programs are different in nature, they're similar enough that comparison is just.

Considering all the factors we've gone over, the score stands at:

Trello: 2

Pipedrive: 2

The winner: A tie

Yes, it comes down to a tie between Pipedrive vs. Trello.

Both platforms offer unique advantages for different types of customers. If your primary focus is generating, tracking, and converting leads — **Pipedrive** reigns supreme.

Yet, if project management is your ultimate goal, **Trello** is the way to go without a doubt.

Our recommendation?

You can integrate Trello with Pipedrive to enjoy the best of both worlds.