AIのCRM

Choosing an AI CRM

What a small B2B sales team in Europe should check · 2026-11-09

A small B2B sales team needs a CRM that is kept up to date by the people who sell, that costs what the pricing page says, and that is set up in days, not a project. For a European company, where the data lives and what the AI provider may do with it are part of the decision, not a footnote. This guide lists what to check, and says how AinoCRM answers each point so you can compare.

8
things to check before you choose

20 min
company set-up, in a conversation

14 days
free trial, no card

> **In short.** The most common failure is not features: it is that the two or three people who sell stop logging. Ask three data questions and expect the answers on the website. Set-up should take a day, AI usage should have a stated price, and you should be able to export everything and leave.

1 Will the team keep it updated?

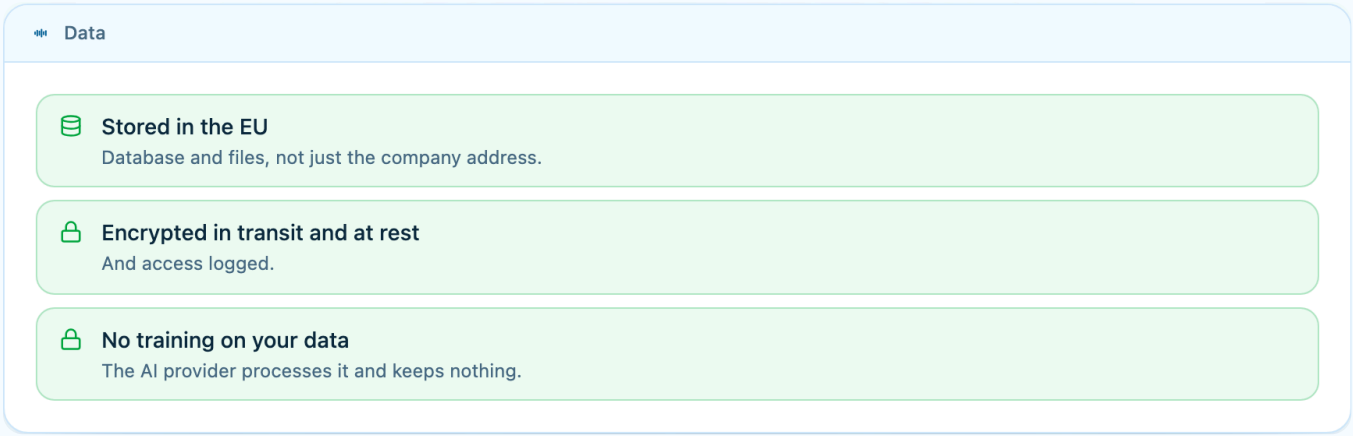
The most common reason a CRM fails in a small team is not features. It is that the two or three people who sell stop logging, and after a month the pipeline is a guess. Check how data gets in. If every update is a form, assume it will slip. An AI CRM that is updated by chat, voice and email filing removes the step that slips.

AinoCRM: the team updates deals by talking to it, typed or out loud, and email files itself. A pen beside each field fixes a detail by hand.

2 Where is the data, and what may the AI do with it?

Ask three things and expect them on the website: where the data is stored, whether it is encrypted in transit and at rest, and whether the AI provider may train on it. For a European company, EU storage and a data processing agreement should be available without asking twice.

AinoCRM: data is stored in the EU, encrypted, and the AI provider may not train on it. The privacy policy at ainocrm.com/privacy says so in plain words.



The three answers a European buyer should find on a vendor's site before the first call.

3 What does the AI really cost?

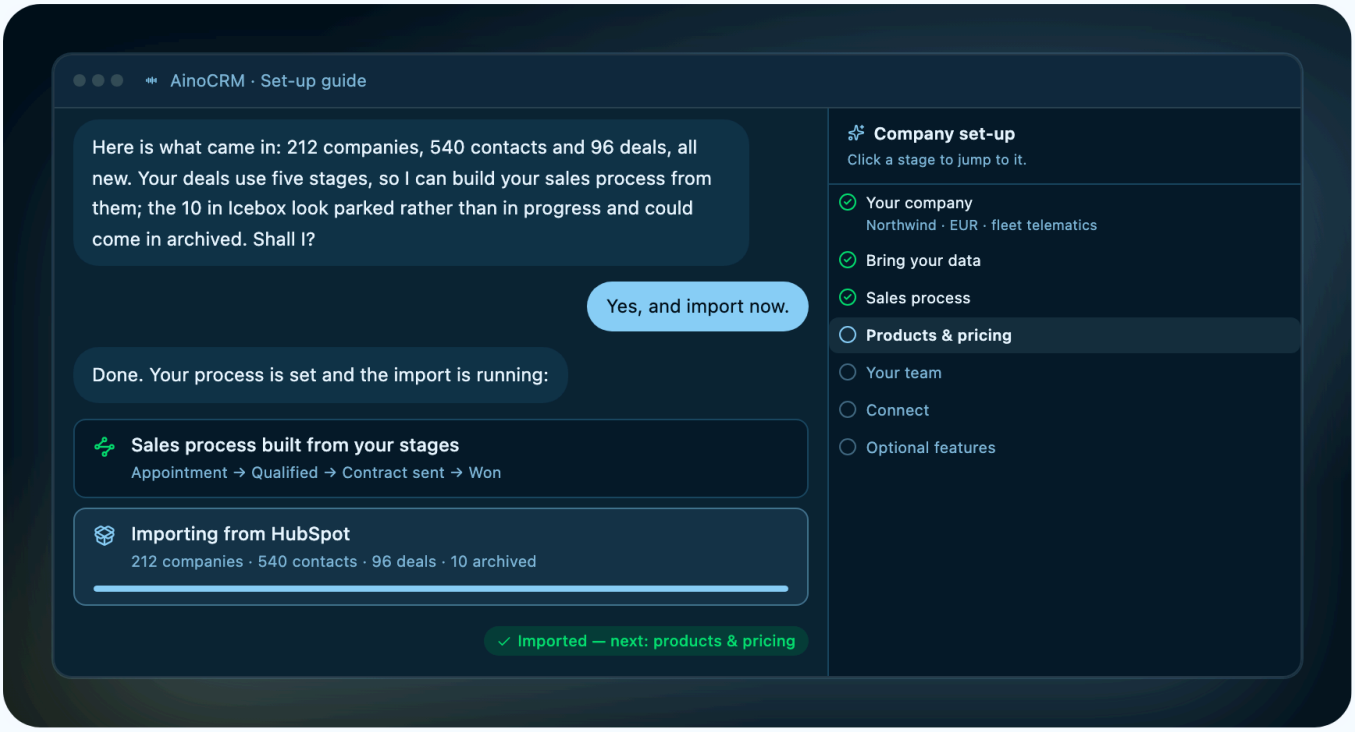
AI features are often priced per seat with a hidden ceiling, or metered after the fact. Ask what a normal day of use costs, what happens when a person uses more, and whether anything is billed after the month ends.

AinoCRM: one price per seat. Every seat includes a daily AI allowance, extra usage is prepaid credits, and nothing is billed after the fact. The numbers are at ainocrm.com/pricing.

4 How long does set-up take?

For a team of five, a CRM should be in use within a day: your stages, your products, your people, your old data imported. If the vendor offers an "implementation package", the product expects a project.

AinoCRM: set-up is a conversation. Aino asks about your company, builds the sales process and product list with you, imports from a HubSpot, Salesforce or Pipedrive export or a spreadsheet after a dry run, and invites the team.



Set-up in AinoCRM: the old system's export is dropped into the chat and dry-run before anything is written.

5 Does it enforce your process?

Small teams rarely have a sales-ops person to police stages. The CRM should know what a deal needs before it moves on, and check the data rather than ask the rep to tick a box.

AinoCRM: each stage has requirements, and a deal moves when they are met.

6 Does the leader get a forecast without chasing?

With a small team the leader usually sells too, and has no time to collect updates before a review. The forecast should be built from current deal data, with a view of what closes, what slips and what is at risk, and a sign of how reliable it is.

AinoCRM: the leader dashboard does this per quarter, with per-person targets.

7 Will it work on the phone, in a car?

Small-team salespeople travel. Check that the phone app does the whole job, not a cut-down version, and that it works by voice.

AinoCRM: the iPhone and Android apps are the full product, with voice.

8 Can you leave?

Ask for an export of everything, in a standard format, at any time.

Before you sign

A CRM you cannot leave is a CRM you cannot negotiate with.

The checklist

CHECK	WHAT GOOD LOOKS LIKE
Data entry	Updated by talking and email, not forms
Data	In the EU, encrypted, no training on it
Price	One price per seat, AI usage stated, nothing billed after the fact
Set-up	A day, old data imported with a dry run
Process	Stage requirements checked against data
Forecast	Per quarter, with risks, without chasing
Phone	The full product, with voice
Leaving	Export of everything at any time

Read more

This checklist run against HubSpot, Salesforce, Attio, Zero and Pipedrive: **ainocrm.com/compare**. Prices: **ainocrm.com/pricing**. More guides: **ainocrm.com/guides**. Try it free for 14 days, up to five people, no card: **app.ainocrm.com/signup**.