ToolGPA

NOVEMBER 2026

Planhat

The Insider's Guide

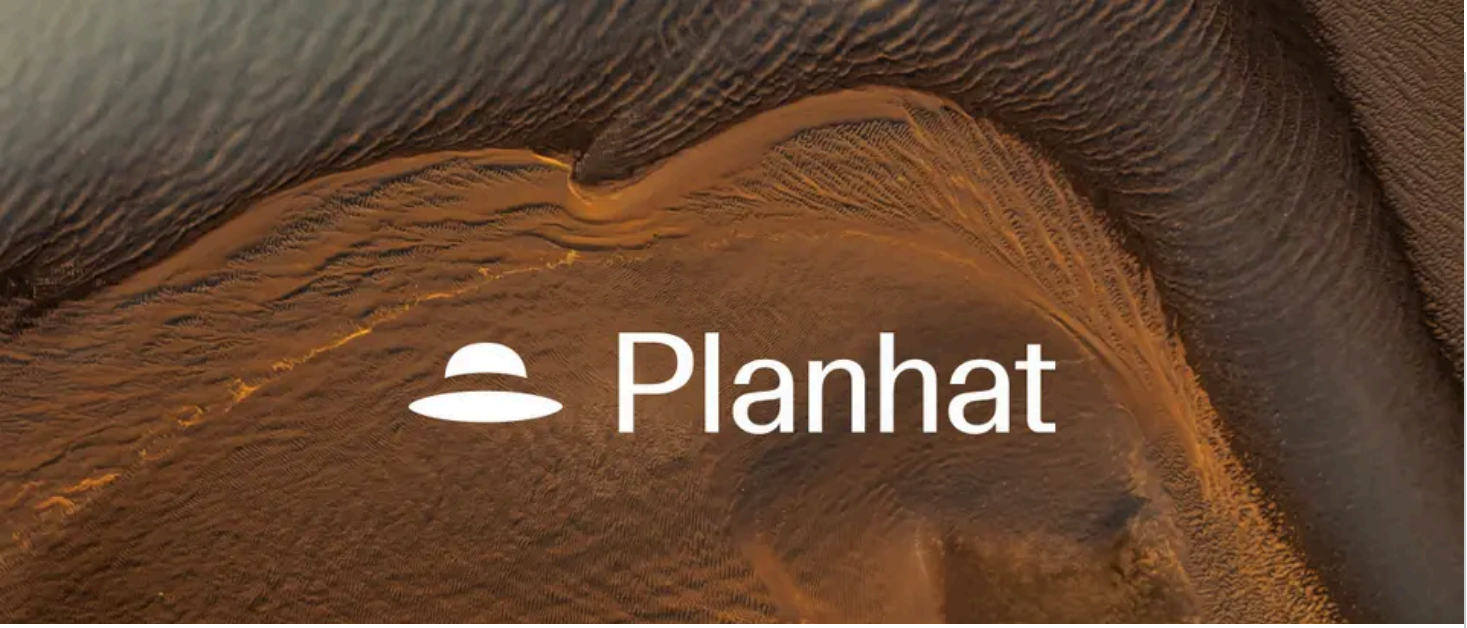
AI-led CRM spanning sales, customer success and renewals



Every plan, grade, refund rule and rival among CRM tools, read from Planhat's own pages.

Made by Planhat Inc. · checked Nov 13, 2026 · toolgpa.com

1.6
GPA



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Who made this guide, what else is on the site, and how to cite it

ToolGPA put this guide together from Planhat's own pages, its app-store listings and our grades. Every fact in it is on Planhat's page too, where it is kept up to date. Checked Nov 13, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

1.6

GPA, above 3 of the 116 other CRM tools we grade

Planhat is a CRM and customer platform aimed at B2B teams that sell to, onboard and renew the same accounts. Its CRM covers pipeline, lead routing and forecasting, and it sits beside customer success and professional services modules. Pricing is not published; every plan is arranged through a demo request.

> **Very small teams and consumer sales are not what it's built for.**
>
> From our report card of Planhat

To get you started, here are **7 things to know about Planhat**, taken from its own pages and our grades.

1 **Best for B2B teams running sales and customer success together**

Nothing on its pricing page shows a price, several features are paid add-ons, and onboarding is a separate service.

2 **It runs on Web**

Web.

3 **Pipeline and forecasting**

The CRM page lists pipeline management, lead routing, lead scoring, deal rooms, funnel analytics and forecasting.

4 **Email sequencing**

Email sequences and email analytics are listed for sales and account management teams.

5 **Pi, the customer agent**

Planhat's AI agent works across sales, success, renewals and professional services using your connected customer data.

6 **A 1.6 GPA, above 3 of 116**

That is against the other CRM tools we grade, on value, the free plan, features, ease of use and platforms.

7 **Keep it**

To replace Planhat you would be making an AI agent, with the models and the safeguards behind it. That is not a weekend's work, with an AI app builder or without one.

Planhat at a glance

PRICING Paid	FREE PLAN No
FREE TRIAL None stated	RUNS ON Web
MADE BY Planhat Inc.	CATEGORY CRM Software
OUR GRADE 1.6 GPA, weak	

The report card

Best for B2B teams running sales and customer success together

Planhat is a CRM for account-based B2B teams that also covers customer success and renewals. Nothing on its pricing page shows a price, several features are paid add-ons, and onboarding is a separate service. Very small teams and consumer sales are not what it's built for.

TOOLGPA REPORT CARD

Planhat

Graded Nov 13, 2026

SUBJECT	GRADE	COMMENT
Value for money	C	No price is published. Every plan and add-on on the pricing page is an enquiry, so there's nothing to compare against the $29 middle for CRM.
Free plan and trial	F	No free plan and no trial on the pages we read. A demo request is the way in.
Features	C	Pipeline, forecasting, email sequences, customer portals and an AI agent. The listing names gaps: the upgraded AI platform, advanced service, email marketing and advanced portals are paid add-ons.
Ease of use	C	No store rating on record. Onboarding, technical and AI deployment are sold as separate services, which says it takes setup.
Platforms and integrations	C	Web only, with Slack and Claude listed. No apps or desktop version.

Grade point average — Weak, out of 4.0 **1.6**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who Planhat is for

- ✓ Fits if you sell to other businesses and want sales and renewals in one system
- ✓ Works for account teams that manage customers over years, not one-off deals

Who it is not for

- ✕ Not for you if you want a price before talking to sales, as none is published
- ✕ Skip it if you have no budget for add-ons, because AI, advanced service, email marketing and portals cost extra
- ✕ Not for you if you are a very small team or sell to consumers, as it is built for account-based B2B
- ✕ Watch out: onboarding, technical deployment and AI deployment are separate paid services

Good to know

Good for

- ✓ B2B companies that want sales and customer success on one customer record
- ✓ Teams with recurring revenue that care about renewals and churn
- ✓ Mid-size and enterprise teams that expect a guided rollout

Worth knowing

- ⓘ No prices are published: every plan and add-on on the pricing page is an enquiry.
- ⓘ Several capabilities are paid add-ons: upgraded AI platform, advanced service, email marketing and advanced portals.
- ⓘ Onboarding, technical deployment and AI deployment are sold as separate services.
- ⓘ It is built for account-based B2B work rather than very small teams or consumer sales.

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

Planhat's current pricing could not be confirmed from its own site.

"

No free plan and no trial on the pages we read.

From our grade for free plan and trial

We could not confirm Planhat's current prices from its own site, so this guide lists no plans. planhat.com has them.

What it does

Its main features, where it runs, what it works with and who makes it

1

Place it runs: Web

AI-led CRM spanning sales, customer success and renewals. Here is what it does, as its own site describes it, and what it covers: public API, AI features, sales pipeline, workflow automation, AI agents, reports.

> **Pipeline, forecasting, email sequences, customer portals and an AI agent.**

From our grade for features

Pipeline and forecasting

The CRM page lists pipeline management, lead routing, lead scoring, deal rooms, funnel analytics and forecasting.

Email sequencing

Email sequences and email analytics are listed for sales and account management teams.

Pi, the customer agent

Planhat's AI agent works across sales, success, renewals and professional services using your connected customer data.

Auto-enriched records

Records are filled in with firmographic, intent and product-usage data to cut manual entry, according to the vendor.

Automations and playbooks

Templated and advanced automations, task management and custom pages are in the plan comparison.

Customer portals

An Advanced Portals add-on provides a shared space for collaboration with prospects and customers.

Where it runs

Web

What it works with

Slack

Claude

Planhat is made by Planhat Inc.

PART 04 · STANDING

Where it stands

Its grades against its category, and whether to keep it or make your own

3/116

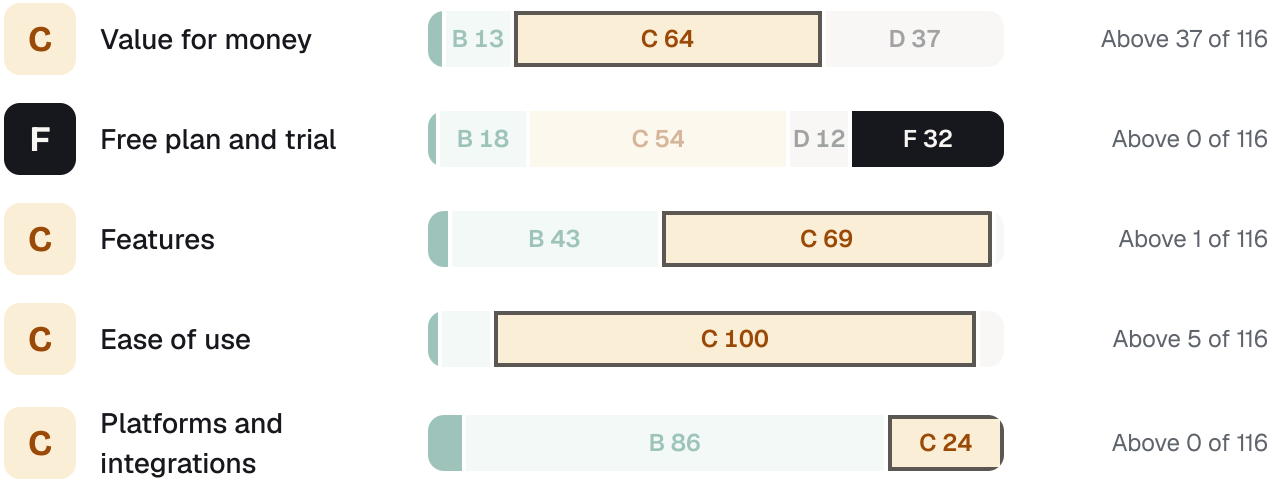
Other CRM tools it is graded above

Planhat's GPA of 1.6 is higher than 3 of the 116 other CRM tools we grade, and level with 12.

It stands best on value for money (C, above 37 of 116) and worst on free plan and trial (F, above 0).

Each grade against the category

Every bar is all 117 CRM tools we grade, cut by the letter each got. Planhat's own letter is outlined.



Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace Planhat you would be making an AI agent, with the models and the safeguards behind it. That is not a weekend's work, with an AI app builder or without one.

That makes this kind of software worth paying for, not this one in particular: 101 of the 116 other CRM tools grade higher.

What you could make

- Sales pipeline and reports: an app builder makes these well.

What you could not

- An AI agent, with the models and the safeguards behind it.
- Connections to other products, each kept working as those products change.
- Sharing with other people, which means accounts and invitations.

What this rests on. Planhat's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



HubSpot, Salesforce, Attio, Microsoft Dynamics 365 Sales and Close

The 5 tools Planhat is most often weighed against, with where each one differs from it.

3.2 GPA

HubSpot

Free plan · from $20/mo

Free CRM at the center of a marketing, sales and service suite.

- HubSpot has a free plan. Planhat does not.
- Only HubSpot lists iOS and Android apps.
- Only HubSpot lists a browser extension.

Planhat and HubSpot compared in full

2.8 GPA

Salesforce

Free plan · from $25/mo

CRM platform for sales teams with AI agents and a free 2-user suite.

- Salesforce has a free plan. Planhat does not.
- Only Salesforce lists iOS and Android apps.
- Only Salesforce lists a browser extension.

Planhat and Salesforce compared in full



2.4
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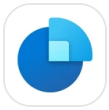
Attio

Free plan · from $35/mo

CRM with a customizable data model, workflows and AI agents.

- Attio has a free plan. Planhat does not.
- Only Attio lists iOS and Android apps.
- Only Attio lists a browser extension.

Planhat and Attio compared in full



2.2
GPA

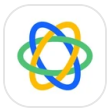
Microsoft Dynamics 365 Sales

Free trial · from $65/mo

Microsoft's sales CRM with Copilot and prebuilt sales agents.

- Only Microsoft Dynamics 365 Sales lists iOS and Android apps.

Planhat and Microsoft Dynamics 365 Sales compared in full



2.4
GPA

Close

Free trial · from $9/mo

Sales CRM with built-in calling, SMS, email and an AI teammate.

- Only Close lists macOS, Windows, iOS and Android apps.
- Planhat also covers AI agents and reports.
- Close also covers transcription.

Planhat and Close compared in full

Quick answers

The questions people ask about it, each answered in a line or two

11

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is Planhat free?

No. Planhat is a paid product.

What platforms does Planhat work on?

Planhat is available on Web.

Does Planhat have an Android app?

No Android app was listed when its pages were read on Nov 13, 2026. Planhat is listed for Web.

Does Planhat have an iPhone app?

No iPhone app was listed when its pages were read on Nov 13, 2026. Planhat is listed for Web.

Is Planhat open source?

Planhat is not described as open source on its own site, as read on Nov 13, 2026.

Does Planhat have an API?

Yes. Planhat offers a public API, according to its own site.

What does Planhat integrate with?

Planhat's listing names Slack and Claude. A listing names up to eight integrations, so it may connect to more.

Who makes Planhat?

Planhat is made by Planhat Inc.

What are the alternatives to Planhat?

The closest alternatives to Planhat in our directory are HubSpot, Salesforce, Attio, Microsoft Dynamics 365 Sales and Close.

How does Planhat compare with other CRM tools?

Planhat's GPA of 1.6 is higher than 3 of the 116 other CRM tools we grade, and level with 12.

Could I make my own version of Planhat?

To replace Planhat you would be making an AI agent, with the models and the safeguards behind it.

Where this guide comes from

The prices, plans, platforms and features were read from Planhat's own pages on Nov 13, 2026, and the grades were given on Nov 13, 2026. Graded from this listing, whose facts were read from Planhat's own pages on 13 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by Planhat Inc. Prices change, so check planhat.com before you buy.

planhat.com/pricing
planhat.com/pi/crm

planhat.com/

PART 07 · ABOUT

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

7,721

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at **toolgpa.com**.

7,721	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

Planhat, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/planhat

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "Planhat: The Insider's Guide",
checked Nov 13, 2026.
https://toolgpa.com/tools/planhat
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Know someone choosing between CRM tools?

Send them this guide: toolgpa.com/tools/planhat/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded CRM tools after Planhat, each with an Insider's Guide of its own.

CRM Software Insider's Guide

Every one of the 117 CRM tools we grade, compared

HubSpot Insider's Guide

Free CRM at the center of a marketing, sales and service suite

3.2 GPA

Frappe CRM Insider's Guide

Open-source CRM with unlimited users, billed by hosting

3.0 GPA

Givebutter Insider's Guide

Free fundraising platform with a built-in nonprofit CRM

3.0 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what Planhat's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Planhat is a trademark of its owner, and this guide is not made, paid for or approved by Planhat Inc. Prices and plans change: check planhat.com before you buy.