

The Top 6 AI Powered CRM, Collaboration and Knowledge Management Tools (January 2024)



AI-powered tools will increasingly reshape how we interact, manage knowledge, and streamline workflows. Hereunder, we bring our six favourite AI-powered CRM, collaboration, and knowledge management tools.

Each offers unique capabilities to enhance your business operations. From HubSpot's all-encompassing CRM solution to Team-GPT's specialised ChatGPT enhancement for teams, they're about creating a more connected, efficient, and intelligent work environment. Through intuitive project management, seamless document creation, or advanced data organisation, each brings a unique combination of capabilities to the table.

In this article, we'll unpack the features and benefits of each tool, focusing on how they can transform your CRM and collaboration efforts. We've paid particular attention to their ease of use, integration capabilities, and the unique AI-driven advantages they offer. Plus, we'll provide insights into pricing and free trial options, helping you make a decision that aligns with your business needs and budget.

Want to pick the right tools for jobs you or your company want to make more efficient and effective? We have done the heavy lifting, testing them out, inviting you to explore how they might enhance your digital marketing strategy and boost your results, and asking you to share your experience with them. Your learnings and thoughts are invaluable to us and others exploring similar options.

In 2023, we've explored and tested over a hundred and fifty AI-powered tools. The following blog is one of six articles we created to cover the best fifty AI tools in various categories.



1: HubSpot - Marketing, Sales, and Service Software

[Link to HubSpot](#)

Description: HubSpot is a comprehensive CRM platform that integrates marketing, sales, content management, and customer service. It offers a suite of tools and integrations designed to connect businesses with their customers, streamline operations, and drive growth. HubSpot's platform is modular, allowing businesses to use individual products or combine them for a more holistic solution. The platform emphasizes the importance of humanizing every aspect of business processes, ensuring that customers have a personalized and engaging experience.

Key Features:

1. **Marketing Hub:** Tools to grow traffic, convert visitors, and run complete inbound marketing campaigns at scale.
2. **Sales Hub:** CRM software with insights into prospects, automation of tasks, and tools to close deals faster.
3. **Service Hub:** Customer service tools to connect with customers, exceed their expectations, and turn them into brand promoters.
4. **CMS Hub:** Content management software that offers flexibility for marketers and power for developers, ensuring a personalised and secure user experience.
5. **Operations Hub:** Operations software that syncs apps, curates customer data, and automates processes for better team collaboration.
6. **Analytics:** Gain insights into performance metrics and make data-driven decisions.
7. **Integrations:** Over 1,400 integrations to connect HubSpot with other tools and platforms.
8. **Learning and Community:** Access to free courses, certifications, resources, and a thriving HubSpot user community.

Potential Use:

- **Content Creation:** Use HubSpot's tools to design and produce content tailored for specific campaigns or offers.
- **Content Automation:** Automate processes related to marketing, sales, and customer service.
- **Content Posting:** Engage with your audience through personalized emails, promotions, and offers.
- **Content Collaboration:** Collaborate with team members to align strategies with overall content goals and ensure consistent messaging and branding.

For a more detailed overview and to explore their products, you can [learn more about HubSpot here](#).



Cost of basic subscription (as of December 2023, per month): \$18 (freemium available)

2: Trello - Collaboration and Project Management

[Link to Trello](#)

Description: Trello is a visual collaboration tool that creates a shared perspective on any project. It uses cards and boards to organize tasks, projects, and more in a flexible and rewarding way. Trello's boards, lists, and cards enable teams to organize and prioritize projects in a fun, flexible, and rewarding way. It's widely used for project management, task management, and team collaboration.

Key Features:

1. **Boards, Lists, and Cards:** Organise tasks and projects using a visual board, with lists representing stages or categories and cards representing individual tasks.
2. **Customisable Workflows:** Create custom workflows to suit any project or team's needs.
3. **Integrations:** Connect with various apps and tools to enhance Trello's functionality.
4. **Butler Automation:** Built-in no-code automation to streamline repetitive tasks and processes.
5. **Templates:** Use pre-built templates or create your own to streamline project setup.
6. **Multiple Views:** View projects from different perspectives, including timeline and calendar views.
7. **Collaboration:** Invite team members to boards, assign tasks, set due dates, and collaborate in real-time.

Potential Use:

- **Project Management:** Use Trello to manage content creation, distribution, and analysis projects.
- **Task Management:** Break down larger projects into individual tasks and track their progress.
- **Collaboration:** Collaborate with team members, get feedback, and ensure everyone is aligned on project goals and tasks.



- **Content Calendar:** Use Trello as a content calendar to plan and schedule content releases.
- **Automation:** Automate repetitive tasks like content approvals, reminders, and more using Butler.
- **Integration:** Integrate with other tools in the content machine to streamline processes and enhance functionality.

For a more detailed overview and to explore its features, you can [learn more about Trello here](#).

Cost of basic subscription (as of December 2023, per month): \$10 (freemium available)

3: PandaDoc - Document Creation and Management

[Link to PandaDoc](#)

Description: PandaDoc is a comprehensive document automation software that streamlines the process of creating, approving, and eSigning documents. It's particularly useful for official documents like contracts, proposals, quotes, and more. With PandaDoc, businesses can create professional-looking documents using customizable templates, collaborate with team members in real-time, and get documents signed electronically, ensuring a faster and more efficient workflow.

Key Features:

1. **Document Creation:** Use drag-and-drop editing and choose from over 750 ready-to-use templates or customise your own.
2. **eSignatures:** Securely sign documents online with legally binding eSignatures.
3. **Real-time Collaboration:** Collaborate with team members, get feedback, and make edits in real-time.
4. **CRM Integrations:** Seamlessly integrate with popular CRM platforms to pull customer data into your documents.
5. **Document Analytics:** Track document interactions, such as when they're opened, viewed, and signed.
6. **Automation:** Use built-in automation features to streamline repetitive tasks and processes.
7. **Compliance and Control:** Ensure document accuracy and compliance with pre-approved templates and content blocks.



Potential Use:

- **Document Creation:** Use PandaDoc to create official documents like contracts, agreements, and more.
- **Collaboration:** Collaborate with team members on document creation and review.
- **Document Management:** Store, organise, and manage all official documents in one centralised platform.
- **Automation:** Automate document workflows, from creation to signature, ensuring a smooth and efficient process.
- **Integration:** Integrate with other tools in the content machine to streamline processes and enhance functionality.

For a more detailed overview and to explore its features, you can [learn more about PandaDoc here](#).

Cost of basic subscription (as of December 2023, per month): \$19 (freemium available)

4: Notion - Collaboration and Knowledge Base

[Link to Notion](#)

Description: Notion is an all-in-one workspace designed to blend various everyday work apps into a unified platform. It offers a connected workspace where better and faster work happens, integrating wikis, docs, and projects. Notion is known for its versatility, allowing teams to create custom workflows, databases, and more, tailored to their specific needs.

Key Features:

1. **Unified Workspace:** Combine notes, tasks, databases, and more in a single platform.
2. **Customisable Workflows:** Create custom boards, lists, and cards to suit any project or team's needs.
3. **Real-time Collaboration:** Collaborate with team members, get feedback, and make edits in real-time.
4. **Templates:** Use pre-built templates for various tasks, from company wikis to project roadmaps.
5. **Notion AI:** Access the power of AI right inside Notion to enhance functionalities.



6. **Integrations:** Seamlessly integrate with other tools and platforms.
7. **Community:** A vibrant community that produces content, teaches courses, and leads events globally.

Potential Use:

- **Knowledge Base:** Use Notion as a centralized knowledge base, storing all essential information, guidelines, and resources.
- **Project Management:** Manage content creation, distribution, and analysis projects within Notion.
- **Collaboration:** Collaborate with team members on content creation, review, and strategy.
- **Documentation:** Document processes, guidelines, and strategies for the content machine.
- **Integration:** Integrate with other tools in the content machine to streamline processes and enhance functionality.

For a more detailed overview and to explore its features, you can [learn more about Notion here](#).

Cost of basic subscription (as of December 2023, per month): \$10 (freemium available)

5: Airtable – Your interactive database and API connector AI

[Link to Airtable](#)

Description: Airtable is a flexible platform that combines the simplicity of a spreadsheet with the complexity of a robust database. It allows users to organize anything, with anyone, from anywhere. Airtable's fields can handle any content you throw at them: attachments, long text notes, checkboxes, links to records in other tables, and more. It's designed to be a low-code platform for building next-gen apps, operationalizing critical data, and reimagining workflows with AI.

Key Features:

1. **Unified Workspace:** Create bases (databases) with tables, views, and records to manage and visualise data.



2. **Customisable Views:** Display data in various views, including grid, calendar, kanban, gallery, and more.
3. **Real-time Collaboration:** Collaborate with team members, share views, and comment on individual records.
4. **Templates:** Use pre-built templates for various tasks, from project management to content calendars.
5. **Integrations:** Connect Airtable with other tools and platforms, enhancing its functionality.
6. **AI Components:** Integrate AI functionalities into your workflows, making them dynamic and more efficient.
7. **API and Automation:** Automate workflows and connect Airtable to other apps using its robust API.

Potential Use:

- **Data Management:** Use Airtable as a centralised database for content ideas, schedules, metrics, and more.
- **Collaboration:** Collaborate with team members on content planning, review, and strategy.
- **Content Calendar:** Use Airtable to plan and schedule content releases.
- **Integration:** Connect Airtable with other tools in the content machine to streamline processes and enhance functionality.
- **Custom Apps:** Build custom apps tailored to your content creation and distribution needs.

For a more detailed overview and to explore its features, you can [learn more about Airtable here](#).

Cost of basic subscription (as of December 2023, per month): \$20 (freemium available)



6: Team-GPT - A platform designed to enhance the use of ChatGPT for teams

[Link to TeamGPT](#)

Key Features:

1. **Folders and Subfolders:** Organise knowledge efficiently by categorising chats in folders and subfolders, reducing clutter and enhancing accessibility.
2. **Prompt Library:** Access over 100 ready-to-use prompt templates and 50+ tips and tricks to master GPT, accelerating the team's journey to AI adoption.
3. **Cost Savings:** Pay only for actual usage with priority access to the OpenAI API, offering significant cost savings compared to standard ChatGPT Plus subscriptions.
4. **Adoption Reports:** Gain insights into the team's adoption rate and engagement level with ChatGPT, helping to measure and enhance AI integration within the agency.
5. **Collaborative Learning:** Learn and improve AI usage through group chats with the AI, fostering a collaborative learning environment.
6. **Customisable Workspaces:** Tailor the ChatGPT workspace to the agency's specific needs, ensuring efficient knowledge sharing and team collaboration.
7. **Interactivity and Engagement:** Share AI-generated documents online with interactive elements to capture the audience's attention and promote the agency's services.
8. **Branding and Customisation:** Incorporate the agency's branding into AI-generated content, maintaining brand integrity even with AI-assisted creation.
9. **Multiple Sharing Options:** Share documents online with a flipbook effect, download in various formats, or share on social media, offering versatility in content distribution.

Benefits:

- **Enhanced Team Collaboration:** Facilitates seamless collaboration among team members on AI-related projects and prompts.
- **Efficient Knowledge Management:** Organises and categorizes AI-generated content and conversations, making them easily accessible for future reference.
- **Cost-Effective AI Adoption:** Provides a more economical solution for integrating AI into the agency's workflow.
- **Data-Driven Insights:** Adoption reports help in understanding the team's engagement with AI, guiding training and development efforts.
- **Streamlined Learning Curve:** The prompt library and collaborative features accelerate the team's proficiency with AI tools.

Cost of basic subscription (as of December 2023, per month): \$20 (freemium available).

