

CRM Toolkit for Freelancers (Free!)



Effective CRMs help freelancers organize leads and clients. Many popular tools offer free tiers for solopreneurs. For example, Bitrix24's free plan includes unlimited users, contacts, and deals ¹, making it a powerful no-cost option. The comparison chart below highlights six CRM platforms suitable for freelancers, summarizing their key features, starting prices, free-plan availability, and best use cases.

CRM Comparison Chart

Name	Key Features	Pricing (from)	Free Plan	Best Use Case
HubSpot CRM	Contact, deals & task management, email integration, and reporting ²	Free (with optional paid add-ons from ~\$45/mo)	Yes (free forever with core CRM) ³	All-in-one CRM/ marketing for freelancers
Zoho CRM	Lead & deal tracking, custom fields, workflows, and analytics ⁴	Free up to 3 users; paid plans from \$14/ user/mo	Yes (3 users, 5,000 records) ⁴	Growing teams needing a scalable, affordable CRM
Bitrix24	CRM + project collaboration (tasks, chat, telephony), sales funnels ¹	Free (cloud); paid plans from ~\$69/mo	Yes (unlimited users & records) ¹	All-in-one CRM for teams wanting free collaboration

Name	Key Features	Pricing (from)	Free Plan	Best Use Case
Freshsales (Freshworks CRM)	Email/contact management, built-in phone, lead scoring ⁵	Free up to 3 users; paid from \$11/user/mo	Yes (3 users) ⁶	Small teams needing a straightforward sales CRM
Capsule CRM	Visual pipelines & tasks, calendar integration, custom fields ⁷	Free up to 2 users (250 contacts); paid from \$18/user/mo	Yes (2 users, 250 contacts) ⁸	Solo entrepreneurs wanting an intuitive, simple CRM
Streak CRM	Gmail-based CRM with multiple pipelines and email tracking ⁹	Free basic plan; paid from \$59/user/mo	Yes (free plan with limits) ¹⁰	Freelancers who live in Gmail and want CRM in their inbox

Notion CRM Template

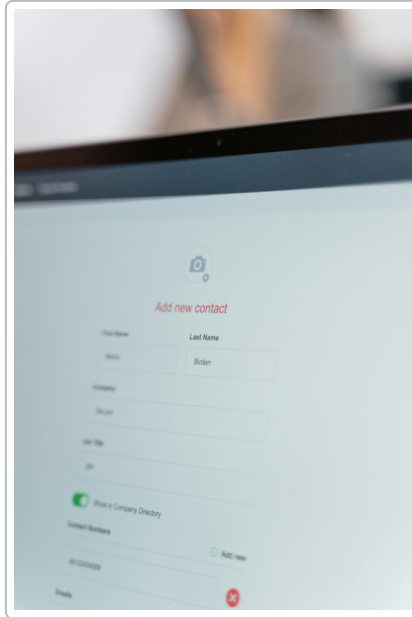
The Notion CRM template above gives freelancers a simple dashboard to manage leads and clients. To use it, **duplicate the template** into your workspace ¹¹. The template organizes one database of all contacts with multiple views. For example, the **“Client Funnel”** view sorts contacts by stage (Lead, Current, Past) for a bird’s-eye overview ¹², and the **“Prospects”** view lists all active leads (Lead, Pitched, Negotiating) with timeline and next-action columns ¹³. Each contact entry can include fields for contact info, status, next action date, and notes. A built-in **“New Lead”** template pre-loads helpful items like an email pitch template and reference fields ¹⁴. By filling in and moving leads through these views, freelancers can track their pipeline stages, client details, and follow-ups in one place.

To get started, go to the shared Notion template, click **“Duplicate”** (upper right) to add it to your workspace ¹¹. Then edit the views and fields as needed: enter new leads, update their status, and keep client resources (like contracts or style guides) on file. This free Notion CRM lets a solo professional track prospects, clients, and notes without complex software.

Zapier Automation Cheat Sheet

Freelancers can save time by automating workflows with Zapier. Here are some common client-management automations:

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New form submission → Add to CRM: When a client or lead submits a web form (e.g. via Google Forms or Typeform), automatically create a new contact/lead in your CRM or a Google Sheet.

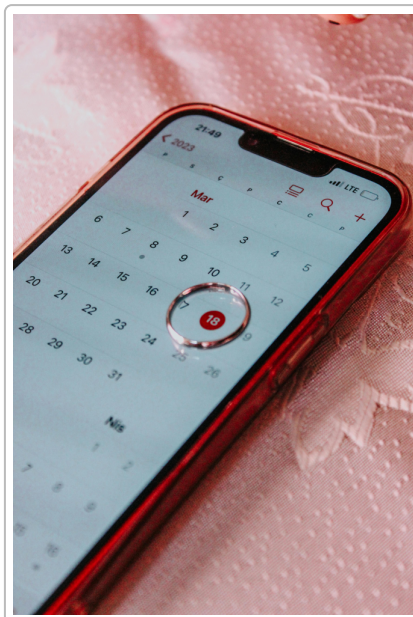
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New client onboarded → Send welcome email: When a new client record is added to the CRM, trigger an automated welcome email (via Gmail or Mailchimp) to introduce yourself and next steps.



Deal won → Create invoice: When a project is marked complete (or a deal moves to “Won” in your CRM), automatically generate or send an invoice (using QuickBooks, Freshbooks, or a template) to bill the client.



New calendar event → Log in CRM: When a client schedules a meeting (via Calendly or Google Calendar), automatically add that event or reminder to your CRM or task manager so you can prepare notes.



New task or note → Add to To-Do list: When you add a follow-up or project item (in an email or CRM), use Zapier to create a task in your to-do app (e.g. Todoist, Asana or Google Tasks) so all action items stay in sync.

Each automation is a *Zap* with a trigger (e.g. form submission) and an action (e.g. add record, send email). By connecting apps like your CRM, email, calendar, and form tools via Zapier, freelancers can eliminate manual data entry and never miss a lead or client task.

Sources: Data on CRM features, pricing, and free plans are from official product pages and reviews ² ³ ¹ ⁴ ⁸ ¹⁰ ⁶ ¹¹ ¹² ¹³ ¹⁴ . The Notion template comes from Nicole Replogle's CRM example ¹¹ . All icons and screenshots are for illustration.

¹ Best Free Unlimited CRM - Most Flexible And Scalable To Any Business Size

<https://www.bitrix24.eu/uses/best-free-crm.php>

² HubSpot Free Version: Complete Guide to Features & Limitations (2025) - Zeeg

<https://zeeg.me/en/blog/post/hubspot-free>

³ 11 Best CRM for Freelancers in June 2025

<https://millo.co/crm-for-freelancers>

⁴ ⁷ ⁸ ⁹ ¹⁰ Best free CRM software in 2025 | Zapier

<https://zapier.com/blog/best-free-crm/>

⁵ ⁶ How much does Freshsales cost in 2024? | Freshsales (prev. Freshworks) Pricing

<https://www.lessannoyingcrm.com/crm-pricing/how-much-does-freshworks-cost>

¹¹ ¹² ¹³ ¹⁴ Notion CRM template: How to turn Notion into your CRM | Zapier

<https://zapier.com/blog/notion-crm/>