ACROSS THE TABLE

BUSINESS CONSULTING

BUSINESS JOB 08 · EPISODE 8

HubSpot vs Apollo vs Clay

Finding customers, researching them, and keeping track of them — three different jobs, not three competing tools

Knowledge Article 08

AI Stack Series · acrossthetable.biz

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THE JOB THESE THREE DO

Most comparison articles pit these against each other. That is misleading, because they do different jobs.

One finds people who might buy from you. One researches them so your approach is not generic. One keeps track of everyone you are talking to.

A business that needs more customers usually needs the keeping-track part first, and that part is free.

WHO EACH ONE IS

HubSpot — the system of record

What it is: Customer records, marketing, sales and service in one platform.

Best for: Small businesses that want one system of record.

Watch out for: Costs step up sharply by tier and contact count.

HubSpot is where your customers live — who they are, what they wanted, what you promised. Its basic customer system is free and holds more than most small businesses will ever need.

Apollo — the finder

What it is: Contact database plus sequencing and dialing.

Best for: Outbound teams who need list and outreach in one place.

Watch out for: Data decays. Verify before you send.

Apollo is a database of business contacts with outreach built in. You search for the kind of company you want, get names, and send to them from the same place.

Clay — the researcher

What it is: Enriches and researches prospect lists with AI, from many data sources.

Best for: Precise, researched outbound instead of blast lists.

Watch out for: Powerful and genuinely complex.

Clay takes a list of prospects and researches each one so your outreach can reference something real. It is genuinely complex and it is priced by credits. This is not a starting point.

HOW THEY COMPARE

	HubSpot	Apollo	Clay
Best for	CRM	Prospecting	Lead enrichment

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	HubSpot	Apollo	Clay
Ease of use	Beginner / Intermediate	Intermediate	Advanced
Small-business fit	High	High	Medium
Larger-business fit	High	High	High
Its main job	Manage customers	Find prospects	Research and personalize prospects
Choose this if	You need CRM infrastructure	You need leads	You want advanced outbound personalization
Price	Free CRM; paid hubs per month.	Free tier; paid per user/month.	Paid by credits/month.

Look at the ease-of-use row. HubSpot is beginner, Apollo intermediate, Clay advanced. That ordering is also the order most businesses should adopt them in.

> **WHERE TO START**
> Apollo finds them → Clay enriches them → HubSpot manages them. That's how multiple applications form a business technology stack.

HOW A BUSINESS ACTUALLY USES EACH ONE

A business with leads it keeps losing

HubSpot's free customer system. Every enquiry gets a record and a next step. No outbound at all — just stopping the leaks in what already arrives.

A business that needs to go and find customers

Apollo builds the list and sends the sequence. Watch the data: contact details decay constantly, so verify before sending or your email reputation suffers.

A team doing serious outbound

Clay researches each company so the first line of the email is about them rather than about you. Real work, real cost, and only worth it once outbound is already producing.

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WHAT IT COSTS

HubSpot's customer system is free. Apollo has a free tier. Clay is paid by credits only.

HubSpot is the one to watch financially: the free system is genuinely free, but the paid tiers step up sharply by feature and contact count. Know what triggers the next tier before you build on it.

WHERE THIS SITS IN YOUR STACK

Now let's build an entire sales technology stack. Your prospecting platform helps identify potential customers. LinkedIn Sales Navigator adds professional prospect intelligence. Calendly removes the back-and-forth of scheduling. Fireflies captures and summarizes the sales conversation. PandaDoc can support the proposal and agreement stage. And automation connects information between the appropriate systems. Now we're no longer asking which AI can find leads. We're designing the technology around the entire journey from prospect to customer.

The pieces around it:

- LinkedIn Sales Navigator — professional prospect intelligence
- Calendly — schedule meetings
- Fireflies — capture sales conversations
- PandaDoc — proposals and contracts
- Zapier or Make — connect the workflow

THE CEO DECISION

- Are you losing leads you already have, or do you not have enough? Fix the first before paying for the second.
- Do you have somewhere every customer lives today? If not, start there, free, this week.
- If you are going outbound, who verifies the contact data before you send?
- Is Clay solving a problem you actually have yet? For most small businesses the honest answer is no.

APPLY IT TO YOUR BUSINESS

Count the enquiries you received last month and how many you followed up more than once. If there is a gap, your pipeline problem is retention of interest, not generation of it.

Fix that with the free customer system first. Only once nothing is falling through should you spend money finding more.

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YOUR QUICK REVIEW

- ☐ Where does every customer enquiry live right now?
- ☐ How many did I follow up more than once last month?
- ☐ Do I need more leads, or better handling of the ones I get?
- ☐ If I go outbound, who checks the data before sending?
- ☐ What triggers the next price tier on whatever I choose?
- ☐ What is the one thing I will set up this week?

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
HubSpot	www.hubspot.com	Small businesses that want one system of record.
Apollo	www.apollo.io	Outbound teams who need list and outreach in one place.
Clay	www.clay.com	Precise, researched outbound instead of blast lists.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which of the twenty jobs to start with.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

CONTINUE LEARNING

This is Business Job 08 of twenty. Episode 9 is Run the Work — Notion, ClickUp and Asana.

Episode 5, Zapier vs Make vs n8n, pairs with this: automation is what moves a new lead into your customer system without you.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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