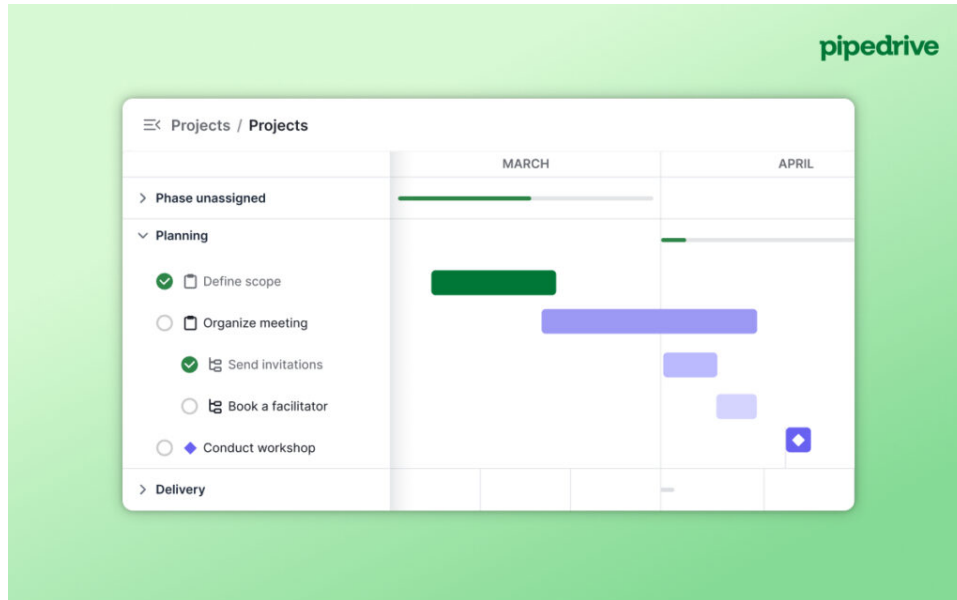


# Pipedrive expands into project delivery with new post-sale management tools

May 26, 2026



**CRM platform Pipedrive has launched a new set of project management and communication capabilities aimed at helping sales teams manage post-sale delivery and customer relationships from within a single platform.**

The move reflects a growing trend across the project and software sectors, where customer delivery, workflow automation and project execution are increasingly converging with traditional CRM environments.

Pipedrive said the new functionality is designed to eliminate the operational gaps that often emerge after deals are closed, when information is handed over between sales, delivery and project teams using disconnected systems.

## CRM platforms moving deeper into project execution

The latest release introduces expanded project management capabilities directly within the CRM platform, enabling organisations to manage onboarding, delivery coordination and customer communication without relying on multiple external tools.

“Sales doesn’t stop when a deal is closed,” said Joe Fuddy, Chief Product and Technology Officer at Pipedrive.

“We believe that when sales teams are freed from the burden of disconnected tools, they can truly perform at their best. These updates are about giving professionals the confidence that their post-sale delivery is as world-class as their initial pitch.”

The shift highlights how CRM vendors are increasingly positioning themselves as broader operational platforms rather than purely sales-focused systems.

## AI-generated project briefs introduced

Among the new features is an AI-generated project brief capability that automatically pulls commitments, notes and files from sales histories into structured delivery documentation.

The functionality is designed to reduce manual handovers between sales and project delivery teams — a common pain point in project-based businesses where lost context frequently creates delays, rework and customer dissatisfaction.

Additional project management capabilities include:

- interactive Gantt timelines
- mobile project access
- workload visibility tools
- project insights dashboards

The enhancements aim to improve visibility across project activity, delivery status and team coordination while helping organisations manage increasingly complex customer delivery environments.

## Automation oversight becomes priority

Pipedrive also introduced expanded workflow monitoring functionality as automation becomes more deeply embedded across sales and operational processes.

The new “Trust and Visibility” dashboard enables teams to monitor workflow performance, identify failed automations and detect process bottlenecks earlier.

This reflects a broader challenge emerging across digitally enabled project environments: as organisations automate more operational activity, maintaining governance, oversight and operational confidence becomes increasingly important.

For project managers and operational leaders, automation monitoring is rapidly becoming as critical as the automation itself.

## WhatsApp integration targets fragmented communication

Another major addition is a native WhatsApp integration allowing teams to manage customer conversations directly inside the CRM.

The feature automatically links conversations to deals, contacts and leads, helping teams preserve communication history across both sales and post-sale delivery activity.

The integration is designed to:

- reduce tool switching
- standardise follow-ups
- improve collaboration
- maintain customer context across teams

As project delivery and customer engagement become more distributed, messaging platforms such as WhatsApp are increasingly becoming operational communication channels rather than purely informal messaging tools.

## Project delivery becoming a competitive differentiator

The launch reflects a wider market shift where customer experience increasingly depends on execution quality after the sale rather than during the sales cycle alone.

For project-based organisations, the transition between commercial agreement and operational delivery is often where inefficiencies, delays and communication breakdowns emerge.

Pipedrive's move into project delivery capability highlights how software vendors are responding to growing demand for connected operational ecosystems that combine:

- CRM
- project management
- workflow automation
- communication
- reporting
- customer delivery tracking

## Growing overlap between CRM and project platforms

The release also illustrates the growing overlap between CRM systems and project management platforms as organisations seek fewer disconnected tools and more unified operational visibility.

Rather than managing sales, onboarding, delivery and communication across separate environments, businesses increasingly want integrated systems capable of supporting the full customer lifecycle.

For project professionals, this trend signals how project execution is becoming more tightly connected to customer relationship management, operational analytics and workflow automation — particularly within service-led and project-based businesses.