

The Sales 3.0 Labs

AI EQI[®]

(ETHICAL QUALITY INDEX)



Assess the AI Risks to
Your Sales Organization

CRM EDITION

Sales 3.0 Labs, the AI research arm of Sales 3.0, is dedicated to delivering critical information for B2B sales. We focus on achieving revenue optimization while ensuring the use of ethically produced AI solutions.

While unchecked use of AI threatens to erase many of its legitimate and useful advantages for B2B sales, the newly created Sales 3.0 Ethical Quality Index (EQI) seeks to mitigate these risks by helping sales professionals and organizations at every level decide which AI solutions to use.

INTRODUCTION

In B2B sales today, AI solutions are doing everything from scheduling appointments to writing proposals. It's used for deep dives into prospects to help salespeople personalize proposals and it can even be used to clone reps so they can contact prospects without actually speaking to them. These are only a few of the accomplishments of AI for B2B sales.

But according to Geoffrey Hinton, often referred to as one of the godfathers of artificial intelligence, this isn't just any new technology. He has stated there is a 10% to 20% chance that AI could drive humanity to extinction within 30 years. And, according to Dario Amodei, CEO of Anthropic (and formerly a key player at OpenAI), AI could drive unemployment toward 20% in the next one to five years. These are not some outsiders tossing about idle speculation; these are the creators of the technology.

But that's not all. Beyond these predicted catastrophic possibilities, many additional issues – including transparency, data privacy, data security, degradation of human interaction, and labor and economic exploitation – already exist in this new age of AI.

To help the professional sales community identify (and protect itself from) the downsides of AI and to harness the best and most useful aspects of this powerful tool, Sales 3.0 has created The Sales 3.0 EQI (Ethical Quality Index) to assess and determine the power and pitfalls of AI in B2B sales.

For decades, Selling Power and Sales 3.0 have been at the forefront of elevating the professional and ethical standards of the sales profession, along with encouraging a “give to grow” mentality.

This index compares the six CRM solutions that our research has identified as being most used by B2B sales organizations. These findings can help you carefully weigh your CRM choices and use – without amplifying the threats inherent in this new technology – while maximizing its benefits for your sales organization.



THE FIVE CORE TESTS FOR SCORING* THE AI EQI

* **Scoring:** Each test awards a score of 0 to 20 for each chatbot, with the total for each chatbot adding up to a max 100 total index score for all tests for each chatbot.

1 TRANSPARENCY TEST

Testing Parameters:

- Does the provider/solution website clearly explain how its AI works?
- Can buyers and users easily understand what data is used, how decisions are made (e.g., lead scoring, prioritization), and where automation begins and ends?
- Is it readily disclosed when AI interacts with prospects or customers?

Results:

TRANSPARENCY TEST RESULTS (RANKED)

Rank	CRM	Score
1	Salesforce	16.43
2	Freshworks	15.86
3	Microsoft Dynamics	15.86
4	Zoho	15.29
5	HubSpot	15.00
6	Pipedrive	12.14
	Category Avg.	15.10

2 DATA PRIVACY AND CONSENT TEST

Testing Parameters:

- Does the solution respect the spirit of data privacy laws and user consent?
- Does the solution comply with regulations like GDPR, CCPA, and CPRA, and avoid scraping or using personal data without active permission?
- Does the solution provider also minimize data collection to only what's necessary for performance?

Results:

DATA PRIVACY & CONSENT TEST RESULTS (RANKED)

Rank	CRM	Score
1	Salesforce	18.14
2	Microsoft Dynamics	17.71
3	Zoho	17.57
4	Freshworks	17.14
5	HubSpot	16.86
6	Pipedrive	16.00
	Category Avg.	17.24

3 BIAS & FAIRNESS TEST

Testing Parameters:

- Does the provider routinely audit for algorithmic bias?
- Has the AI been shown to unfairly favor or have bias against particular industries, geographies, or demographics?
- Does the provider perform regular audits, utilize diverse training data, and human oversight, which are essential to ensure equitable treatment of users, leads and prospects?

Results:

BIAS & FAIRNESS TEST RESULTS (RANKED)

Rank	CRM	Score
1	Salesforce	16.57
2	Freshworks	14.14
3	HubSpot	14.00
4	Microsoft Dynamics	14.00
5	Zoho	13.29
6	Pipedrive	10.57
	Category Avg.	13.76

4 HUMANITY TEST

Testing Parameters:

- Does the solution purposely blur the lines between Human and AI?
- Does the AI augment—not replace—human judgment and actions?
- Does the provider profit directly, or indirectly from exploiting at-risk labor and other business practices that place profit above humanity and the environment?

Results:

HUMANITY TEST RESULTS (RANKED)

Rank	CRM	Score
1	Freshworks	16.29
2	HubSpot	16.14
3	Zoho	16.14
4	Microsoft Dynamics	16.03
5	Salesforce	15.71
6	Pipedrive	14.29
	Category Avg.	15.77

5 CUSTOMER-CENTRIC DESIGN TEST

Testing Parameters:

- Does the AI respect the user or buyer’s journey, avoiding manipulative tactics, and prioritizing long-term relationship-building over short-term gains?
- Does the AI solve a real world need or simply showcase the provider’s technical capabilities?
- Is there an effective feedback loop that allows customers to influence the AI’s behavior?

Results:

CUSTOMER-CENTRIC DESIGN TEST RESULTS (RANKED)

Rank	CRM	Score
1	Freshworks	17.00
2	Microsoft Dynamics	16.93
3	Salesforce	16.86
4	HubSpot	16.57
5	Zoho	16.14
6	Pipedrive	13.86
	Category Avg.	16.23

THE CRM EQI (as of August 2025)

Sales 3.0 Labs EQI Scoring

Chatbot	Transparency Test	Data Privacy & Consent Test	Bias & Fairness Test	Humanity Test	Customer-Centric Design Test	Total Score
Salesforce	■ 16.43	■ 18.14	■ 16.57	■ 15.71	■ 16.86	■ 83.71
Microsoft Dynamics	■ 15.86	■ 17.71	■ 14.00	■ 16.03	■ 16.93	■ 80.53
Freshworks	■ 15.86	■ 17.14	■ 14.14	■ 16.29	■ 17.00	■ 80.43
HubSpot	■ 15.00	■ 16.86	■ 14.00	■ 16.14	■ 16.57	■ 78.57
Zoho	■ 15.29	■ 17.57	■ 13.29	■ 16.14	■ 16.14	■ 78.43
Pipedrive	■ 12.14	■ 16.00	■ 10.57	■ 14.29	■ 13.86	■ 66.86

Color Key

- High (80+) recommended for use, but still needs improvement
- Moderate (65–80) needs some improvement
- Low (50–65) needs substantial improvement
- Minimal (Below 50) not recommended for use

CONCLUSIONS

Only half the CRM solutions analyzed – Salesforce, Microsoft Dynamics, and Freshworks – meet minimum ethical standards. There are many institutional and systemic reasons for this that we will highlight in forthcoming papers and research reports. One key common thread is the commercial race to continually accelerate the release of updates and new products for fear of missed profits.

Our responsibility in the sales industry is to do everything we can to make sure ethics do not get lost in the tech leap shuffle. AI tech companies will take note when and why their solution's utilization and adoption shifts.

We certainly are not discouraging the use or adoption of AI. Just like when we shop at the grocery store (for apples, say), we do not just dump apples into our cart. We turn them over; we look for signs of imperfections or rot. We may note if they are organic, produced without the use of pesticides, or are responsibly sourced.

The Selling Power EQI provides the ability to easily check if the AI solutions you're already using – or are considering for use – are the equivalent of organic or responsibly sourced.

Stay tuned for more Index releases including for the major AI powered Revenue Engine players.

END NOTES

Our EQI is created through the careful analysis of hundreds of pages of research data gathered from a comprehensive array of sources. As the goal is to affect positive change in terms of safe and ethical AI development, we are also actively reaching out to the companies included in our Index studies, to collaborate on such changes and to ultimately improve the ethical quality of AI, from its origins through the end use and potential side effects.



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