ConvergeHub

AUDIT WORKBOOK | 4 PAGES | ABOUT 10 MINUTES

The 10-Minute CRM Cost Leak Audit

Find Out What Your CRM Is Really Costing Your Business.

A practical workbook to uncover hidden CRM expenses and identify opportunities to optimise your software investment.



01 Calculate
your real monthly spend

02 Identify
your CRM cost leaks

03 Plan
what to review first

STEP 1 | CALCULATE

What Is Your CRM Really Costing You?

Add up everything you pay to run your CRM each month, not just the headline subscription. Check invoices, card statements and renewal emails if you are unsure.

Expense category	Your monthly cost
CRM subscription	$
Additional user charges	$
Marketing software/modules	$
Customer service software/modules	$
Third-party integrations	$
Automation tools	$
Support and maintenance	$
Other expenses	$
Total monthly CRM expenditure	$

Your CRM profile

Number of CRM users

Current CRM provider

Number of separate applications used for customer management

THE CALCULATION

Monthly CRM expenditure × 12 = Estimated annual CRM expenditure

	× 12	=	
Monthly total			Estimated annual CRM expenditure

Tip: these two totals calculate automatically in most desktop PDF readers. If yours does not, type the figures in by hand or print the page.

STEP 2 | IDENTIFY

Where Could Your Business Be Overspending?

Tick every statement that is true for your business today. Each tick marks a possible cost leak worth investigating.

A Unused features

- [ ] Are you paying for features your team rarely uses?
- [ ] Does your current plan include capabilities your business doesn't need?
- [ ] Are you paying for advanced features that employees don't use?

B Separate software subscriptions

- [ ] Do you use separate tools for sales, marketing, and customer service?
- [ ] Are you paying multiple subscriptions to manage customer information?
- [ ] Are employees switching between several applications?

C Manual processes

- [ ] Are employees manually assigning leads?
- [ ] Are follow-up emails and reminders handled manually?
- [ ] Are customer records updated across multiple systems?

D Additional expenses

- [ ] Are additional users increasing your subscription costs?
- [ ] Do integrations require extra payments?
- [ ] Are migration, onboarding, training, or support charged separately?

My three biggest potential CRM cost leaks:

1.

2.

3.

STEP 3 | ACT

What Should You Review Next?

Turn your answers into a short review plan. Be specific about the action, then set a priority.

Area to review	Action I will take	Priority
Unused CRM features		☐ High ☐ Medium ☐ Low
Separate software subscriptions		☐ High ☐ Medium ☐ Low
Manual workflows		☐ High ☐ Medium ☐ Low
Additional user costs		☐ High ☐ Medium ☐ Low
Integration expenses		☐ High ☐ Medium ☐ Low
CRM plan and pricing		☐ High ☐ Medium ☐ Low

Your final decision

What CRM capabilities does my business actually need?

Which expenses should I investigate first?

Which workflows could benefit from automation?

When do I plan to review my CRM platform?

ConvergeHub

Could One Connected CRM Simplify Your Revenue Operations?

Explore how ConvergeHub brings sales, marketing, customer service, billing, and AI-assisted workflows together.

Explore ConvergeHub

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