ConvergeHub

01 / THE CHECKLIST

Is It Time to Switch from HubSpot? A CRM Switching Readiness Checklist

Use these 10 questions to assess HubSpot's fit for your team and identify what you'd need to resolve before switching.

Mark one answer per question. Then use the scoring key on page 2.

Evaluation Question	Yes	No
CRM Cost and Value		
1. Are your CRM subscription costs increasing as your business grows?	☐	☐
2. Are you paying for features or add-ons your team rarely uses?	☐	☐
Features and Workflow		
3. Does your current CRM support your sales, marketing, and customer service workflows?	☐	☐
4. Can you customize pipelines, fields, automation, and reporting according to your business requirements?	☐	☐
Automation and Productivity		
5. Are your teams spending too much time on manual data entry and follow-ups?	☐	☐
6. Does your CRM offer the automation and AI capabilities your team actually needs?	☐	☐
Integration and Migration		
7. Can your CRM integrate with the other business applications you currently use?	☐	☐
8. Do you have a clear plan for migrating contacts, deals, activities, and historical records?	☐	☐
Adoption and Scalability		
9. Is your team finding the CRM difficult to use or maintain?	☐	☐
10. Can your current CRM support your future business growth without significantly increasing complexity or costs?	☐	☐

ConvergeHub

02 / ASSESSMENT RESULTS

What Your Score Means

Give yourself one point for each answer that matches the scoring key below.

Count Yes on questions 1, 2, 5 and 9. These answers flag cost, manual work or adoption concerns.

Count No on questions 3, 4, 6, 7, 8 and 10. These answers flag gaps in CRM fit or migration planning.

My total ☐ / 10

0–3 points	Your current CRM may still meet your requirements. Identify specific gaps before considering a switch.
4–6 points	Your CRM may be creating operational or cost challenges. Start comparing alternatives and prioritize your requirements.
7–10 points	Take a closer look at alternative CRMs and develop a switching plan. Compare them against the issues you flagged.

Check Your Migration Readiness

If you answered No to question 8, create a migration plan before setting a switch date. Assign an owner and test a sample export and import of contacts, deals, activities and historical records.

Treat your score as a starting point for discussion. Use the gaps you flagged to decide what to test before making a migration decision.

Considering a HubSpot Alternative?

Compare ConvergeHub and HubSpot using the costs, workflows, automation and integrations that matter to your team.

Compare HubSpot vs ConvergeHub

Book a Demo