Customer service evaluation matrix

Follow the same service request from receipt to resolution in both candidates. A successful transfer must leave someone accountable.

Project / team: _____ Owner: _____
Date / edition: _____ Must-have outcome: _____

Requirement / test	HubSpot Service Hub	Salesforce Service Cloud
Request intake: relevant channels and customer identification		
Routing: language, team, availability and fallback		
Context: customer history within appropriate permissions		
Escalation: priority, response and unresolved work		
Knowledge: public/internal separation and review owner		
AI handover: trigger, context, recipient and next action		
Reporting: response, resolution and reopened cases		

For comparisons: use 0 = not met, 1 = partial, 2 = met, 3 = strong fit. Record evidence and edition dependencies; scores are your assessment, not a vendor rating.

Validate before you commit

Use one realistic scenario and one exception. Note the actual evidence, not only whether the connector or platform reports success.

[ ] A pre-sales enquiry reaches the responsible team.

[ ] A customer issue retains its sales/customer context.

[ ] An unknown language and a missing owner have a fallback.

[ ] A complaint reaches a person with the conversation context.

[ ] Out-of-hours messages describe a realistic next step.

[ ] Knowledge sources have owners and a review process.

[ ] Channels, AI usage and required licences are costed.

Critical blocker / missing evidence

Next action / responsible person

Decision / next review date

Reference / Referenz: https://www.hubspot.com/products/service

Implementation guidance, not a performance guarantee. Verify current product scope and requirements before purchase or rollout.