

BUYER CHECKLIST

HubSpot MCP vs. managed revenue agents

Compare the same production workflow on both sides, and name the operating work that has to exist around a CRM connection.

Use this worksheet to compare the same production workflow. HubSpot MCP can provide permission-governed CRM access; this checklist identifies the operating work that must exist around that connection.

1. Workflow boundary

- Business objective:
- Trigger:
- Completion definition:
- Systems from trigger to completion:
- Actions that must never run autonomously:

2. Access and context

- HubSpot records and activities required:
- Other approved systems and sources:
- Identity and matching rules:
- Source-of-truth definitions:
- Freshness requirements:
- Installing user and effective HubSpot permissions:

3. Responsibilities

Responsibility	Named owner	Evidence to request
Workflow design		Scope, policy and acceptance criteria
Connection and authentication		OAuth lifecycle and access review
Context maintenance		Source inventory, refresh and change owner
Evaluation and release gates		Test set, thresholds and regression process
Human approvals		Decision owner, queue and escalation path
Monitoring and exceptions		Alerts, reason codes and operating review
Recovery and rollback		Retry, incident and rollback process

Responsibility	Named owner	Evidence to request
Outcome review		Baseline, workflow KPI and business KPI

4. Decision

- Why a direct connection is sufficient, or why a managed owner is required:
- Risks accepted by the customer:
- Required pilot evidence:
- Decision owner and date:

RevTech runs fully managed AI agents for GTM; customers govern objectives, permissions, approvals and business decisions. Your CRM remains the system of record.

RevTech provides fully managed AI agents for GTM: RevTech runs the agents, your team governs them. This worksheet accompanies revtech.ai/resources/hubspot-mcp-vs-managed-agents and is an operating template, not legal, regulatory or security advice.