SERVICE 1 OF 5 · FIXED PRICE

CRM Setup

A CRM your team actually works in.

CRM Setup gets your CRM (the software where your team keeps customers, deals and every conversation with them) set up properly, once, so your team actually works in it. We build on HubSpot most often, and also on Salesforce and other CRMs.

YOU MIGHT BE SAYING

"We pay for HubSpot and half the team still works in spreadsheets."

"I can't tell which deals are real without asking each rep."

"We are about to buy a CRM and I do not want to set it up wrong."

WHAT YOU CAN POINT AT WHEN IT IS DONE

- One place where your team keeps customers and deals, set up the way the tier you chose describes
- A written record of what was built or found, in your own account and yours to keep
- Your own acceptance test, passed, before the last part of the fee is due

What is in it

PICK A SIZE	TIMELINE
HubSpot and CRM audit	2 weeks
HubSpot onboarding	2 to 4 weeks
HubSpot implementation	4 to 6 weeks
Migration to HubSpot	4 to 8 weeks
Sales Hub setup · add-on	3 weeks
Marketing Hub setup · add-on	3 weeks
Help desk setup · add-on	3 weeks
Website migration to HubSpot CMS · add-on	4 to 6 weeks

	WHAT COMES IN	WHAT WE BUILD	WHAT YOU GET
HubSpot and CRM, set up properly	Your portal as it is; Your process; Your reports	Audit; Data model; Hubs set up; Automation and first reports	One portal; The first reports; Docs your admin runs

How you buy it

1 Free audit
Book a free 30-minute audit on the contact page.

2 Fixed quote in writing
You get one price and a written list of what is in the box.

3 Build
We do the work in your own account, on tools you already own.

4 Handover
You run your own acceptance test.

WHAT THIS DOES NOT COVER

- Software licenses.
- The add-ons.
- The work of fixing what an audit finds.
- Cleaning the records in a CRM you keep.

FOUR WAYS TO PAY

Fixed-price project. One fixed number for the project. 70% at kickoff, 30% when the test you wrote passes.
Monthly subscription. The Bench: one flat monthly fee, for HubSpot care, one workstream or two. Pause any month.
Build, then hand over. The Step-Down: a monthly fee that falls on dates written into the contract.
Custom fixed quote. Several pieces as one number, in writing within two business days.
The number comes after the free 30-minute audit, in writing, before any work starts.

Start with a free 30-minute audit. You leave with a written list of what is broken, what it would take, and a fixed price for each item.

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One fixed quote in writing follows the free audit. salecopy.io/pricing explains how the number is set.