

TEAM OPERATIONS

CRM workflow & migration blueprint

FIXED FEE

\$500

3 BUSINESS DAYS

BEST FIT

For an 8-10 person team whose customer records and follow-ups are split across spreadsheets, email, and WhatsApp.

DECISION DELIVERED

Choose the lowest-risk system and migration sequence before paying for configuration or custom software.

WRITTEN DELIVERABLES

- 01 Current workflow and failure-point map
- 02 Shared customer and opportunity data model
- 03 Ownership, permissions, duplicate, and audit-history rules
- 04 Comparison of up to three implementation options
- 05 Migration sequence, acceptance checklist, and fixed implementation quote

CLIENT INPUTS

Current spreadsheets, users and roles, five anonymized records, required fields, current tools, and WhatsApp capture requirement.

COMMERCIAL BOUNDARY

\$500 credited toward the \$1,500 configuration if commissioned within 14 days.

PAYMENT AND START

Crypto preferred. Asset, network, USD conversion timestamp, address, confirmations, and fees are agreed in writing. Work starts after payment and required inputs are confirmed.