
40 ANALYTICS



PROPOSAL · [CLIENT NAME]

A connected CRM for the sales team.

PREPARED FOR

[Name], [Role]
[Client name]

PREPARED BY

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DATE

[12 October 2026]
Version 1

01 The problem

Leads arrive by phone, email and WhatsApp and live in personal inboxes and spreadsheets. Nobody can see the full pipeline, follow-ups depend on memory, and month-end reports take two days to put together.

02 What we will build

ITEM	INCLUDES	COST
Discovery and build plan	Workshops, process map, written plan	[Amount]
CRM and sales pipeline	Leads, deals, follow-ups, dashboards	[Amount]
Integrations	Email, WhatsApp and accounting	[Amount]
Training and launch	Two sessions, user guide, go-live week	[Amount]
Total		[Amount]

03 Timeline

PHASE	WHAT HAPPENS	WHEN
Discover	Workshops with your sales and operations leads. Map the current process.	Week 1
Plan	Agree screens, data and integrations. Sign off the build plan.	Week 2
Build	Weekly releases you can try, with a review call each Friday.	Weeks 3 to 8
Launch	Data migration, team training and go-live support.	Week 9

04 Next steps

Reply to confirm the scope, and we will send the agreement and book the first workshop within a week.