

SALES PROCESS SETUP

£1,950

For up to five users

VAT added where applicable

Clear ownership. Consistent follow-up. A visible sales pipeline.

We configure your existing sales tools around an agreed process. Larger teams and more complex requirements are quoted individually.

01

New enquiry ownership

Assign an owner and create the first contact task.

02

Proposal follow-up

Create a follow-up task when a proposal is sent.

03

Overdue follow-up alert

Notify the responsible person when a task is overdue.

WHAT YOUR SETUP INCLUDES

One team and pipeline

Up to five users, six sales stages, essential fields, ownership rules and standard access settings.

Three agreed workflows

Internal tasks and alerts. Equivalent swaps can be agreed before quoting.

One additional business system

One CRM connection through a supported integration. Make, Zapier or n8n can be the bridge; subscriptions are separate.

A prepared data import

One Excel or CSV file, up to 250 rows, with minor formatting fixes and duplicate checks. Existing CRM data can be used directly.

One sales dashboard

Up to six standard views, including pipeline, due/overdue follow-ups and won business, subject to CRM features.

Review and revisions

Testing, one review walkthrough and one consolidated revision round. Fixing our errors does not consume that round.

Training and handover

One 60-minute group session, recording where agreed, written guide and administrator handover. You control your accounts and data.

30 days of fault support

From go-live, for faults against the agreed specification. No two-hour cap on our fault fixes; two-working-day initial response target during UK business hours.

HOW WE WORK TOGETHER

Start with a fit call

Free 15-minute fit call and suitability check before quoting. A 90-minute working session is included after booking.

Clear payment stages

£975 before work starts; £975 after acceptance checks, agreed revisions and sign-off. Balance payable within seven calendar days.

Ten-working-day target

Starts after configuration-plan approval and receipt of payment, access and accepted data. Timely customer decisions and feedback are required.

Optional care £295/month

Up to two hours total, including a monthly check, minor fixes and small changes. Paid monthly in advance; no minimum term or rollover.

Two-working-day response target. Normally starts after included support.

Prospect research from £495

Optional and separate from setup. Quantity, fields, quality checks and data-provider costs are agreed before quoting. Import within the included allowance carries no second import charge.

CLEAR SCOPE AND SEPARATE COSTS

Software, hosting, usage and data costs are separate. Bespoke systems, extra connections, complex migrations, additional workflows and campaign execution receive a separate quote.

Summary of service specification version 1, 26 October 2026. Full scope and terms are supplied with your proposal.