YOUR
LOGO

**COMPANY NAME**

CRM IMPLEMENTATION PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] for your CRM implementation project. We specialize in setting up Customer Relationship Management systems that centralize customer data, streamline processes, and drive sales and service performance.

This proposal outlines how we will support [Client Name] in successfully implementing a CRM tailored to your needs.

# Problem or Opportunity

[Client Name] is looking to improve customer relationship tracking, streamline communications, and enhance sales and service outcomes. Without a CRM system, valuable customer insights may be lost and opportunities missed.

# Proposed Solution

We propose implementing a CRM system that supports your business goals, improves internal coordination, and enhances the customer experience.

Key Benefits:
- Centralized customer data and history
- Better sales and marketing automation
- Improved reporting and decision-making

# Scope of Work

Our CRM implementation services include:

- CRM platform selection and customization
- Data migration and integration
- Setup of pipelines, dashboards, and automation
- User training and documentation
- Post-launch support and optimization

# Timeline

Proposed timeline for CRM implementation and training:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Discovery & Planning | Gather requirements and design solution | [Start Date] |
| Configuration | Customize platform and workflows | [Date] |
| Data Migration | Import and map existing data | [Date] |
| Training & Launch | Team training and go-live | [Completion Date] |

# Pricing

Estimated pricing for CRM setup and onboarding support:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| CRM Configuration | Setup and workflow automation | [Amount] |
| Data Migration | Importing legacy data | [Amount] |
| Training & Documentation | User onboarding materials | [Amount] |
| Support | 30-day post-launch support | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is a CRM solutions provider with experience in implementing platforms such as Salesforce, HubSpot, Zoho, and others.

- Experience: [X] years delivering CRM solutions for B2B and B2C clients
- Strengths: Custom configuration, workflow automation, user adoption
- Mission: To empower businesses with the tools to manage relationships and scale faster

# Case Studies / Testimonials

Case Study: [Previous Client Name]

- Project: HubSpot CRM implementation for professional services firm
- Outcome: 3x faster follow-ups, unified sales pipeline, improved customer retention

Testimonial:
“[Your Company Name] made our CRM transition seamless. The system works exactly how we need it to.” — [Client Name], [Title], [Company]

# Terms and Conditions

Payment Terms: 50% upfront, 50% upon completion.
Support: Includes 30 days of post-launch support.
Changes: Scope changes to be quoted separately upon request.

# Acceptance

To begin your CRM implementation project, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client’s Printed Name]
Title: [Client’s Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_