

CRM PROPOSAL

Private and Confidential

CRM Implementation and Services Proposal

Prepared for

Prepared by

Date

Proposal Reference

1. Introduction

This **CRM Implementation and Services Proposal** ("**Proposal**") outlines the scope of services, implementation approach, pricing structure, and project assumptions for the design, configuration, and deployment of a **Customer Relationship Management** ("**CRM**") system for _____ ("**Client**").

This Proposal is intended to describe the services that _____ ("**Provider**") is prepared to deliver and the commercial terms under which those services may be provided. Unless the parties enter into a separate written agreement, this Proposal is provided for discussion and evaluation purposes.

2. About the Provider

Provider is a professional services organization specializing in CRM strategy, implementation, system integration, and user adoption support. The Provider assists organizations in implementing CRM platforms that improve customer engagement, streamline sales and service operations, and enhance business intelligence capabilities.

Provider's services may include CRM system configuration, process automation, reporting development, data migration, user training, and post-implementation support.

3. Project Objectives

The proposed CRM implementation is intended to support the Client in achieving the following objectives:

- Establish a centralized system for managing customer relationships and interactions
- Improve visibility into sales pipelines and customer lifecycle activities
- Automate key business processes related to marketing, sales, and customer service
- Enable real-time reporting and performance analytics
- Improve collaboration between departments involved in customer engagement

The specific objectives and priorities will be confirmed during the project discovery phase.

4. Scope of Services

Provider proposes to deliver the following CRM implementation services.

CRM Strategy and Discovery

Provider will conduct an initial discovery phase to understand the Client's operational workflows, sales processes, reporting needs, and existing technology environment. Activities may include stakeholder interviews, workflow analysis, and requirements documentation.

CRM System Configuration

Provider will configure the CRM platform in accordance with the documented requirements. Configuration may include:

- User roles and permissions
- Lead, contact, and account management structures
- Sales pipeline stages and opportunity tracking
- Workflow automation rules
- Custom fields and record structures

Data Migration

Provider will assist with the migration of customer data from existing systems into the CRM platform.

Migration services may include:

- Data mapping and transformation
- Data cleansing and normalization recommendations
- Import procedures and validation checks

The Client will remain responsible for providing accurate and complete source data.

Integration Services

Where required, Provider may implement integrations between the CRM system and other business systems used by the Client, such as:

- Email platforms
- Marketing automation systems
- Accounting or billing software
- Customer support tools

The availability and feasibility of integrations will depend on the technical capabilities of the relevant systems.

Reporting and Dashboards

Provider will design and configure CRM reports and dashboards that allow the Client to track key performance indicators and operational metrics.

User Training

Provider will conduct training sessions for designated Client personnel to support effective adoption of the CRM system. Training may include administrator training, end-user training, and documentation materials.

Post-Implementation Support

Provider may offer limited post-implementation support to address configuration adjustments, user questions, and minor technical issues following deployment.

5. Implementation Timeline

The anticipated implementation schedule is outlined below. The timeline may be adjusted based on project complexity, Client availability, and the scope of integrations.

The final timeline will be confirmed once the project scope is finalized.

6. Client Responsibilities

Successful implementation of the CRM system requires active participation from the Client. The Client agrees to:

- Designate a primary project contact with decision-making authority
- Provide timely access to necessary data, systems, and documentation
- Participate in project meetings and requirements validation sessions
- Review and approve deliverables within a reasonable timeframe
- Ensure internal stakeholders participate in training and adoption activities

Delays in providing required information or approvals may impact the project schedule.

7. Pricing and Payment Terms

The pricing for the proposed CRM services is summarized below.

Service Component	Description	Estimated Cost
Discovery and Planning	Requirements analysis and project planning	
CRM Configuration	System setup and customization	
Data Migration	Data preparation and migration services	
Integrations	Integration development and testing	
Training	User and administrator training sessions	
Post-Implementation Support	Limited support following deployment	

Estimated Total Project Cost: _____

Payment terms may include milestone-based billing tied to project phases. Detailed payment terms will be established in any subsequent service agreement executed between the parties. Any services requested outside the defined scope may be subject to additional fees upon mutual agreement.

8. Assumptions

This Proposal is based on the following assumptions:

- The Client will provide access to required systems and data in a timely manner
- The number of CRM users will not exceed _____ during the initial implementation
- Custom development requirements will be limited to standard CRM platform capabilities unless otherwise specified
- Third-party software licenses required for the CRM platform are not included in this Proposal unless expressly stated

If these assumptions change, adjustments to the scope, timeline, or pricing may be necessary.

9. Confidentiality

Both parties agree that any business, technical, or commercial information exchanged during the evaluation of this Proposal will be treated as confidential and used solely for the purpose of assessing the proposed services.

Neither party will disclose such information to third parties without prior written consent, except where disclosure is required for legitimate business evaluation purposes.

10. Validity of Proposal

This Proposal remains valid for _____ days from the date indicated above unless withdrawn or replaced by the Provider.

Acceptance of this Proposal does not by itself create a binding services agreement. The parties may enter into a separate written agreement that defines the final scope of services, pricing, responsibilities, and other contractual terms governing the project.

11. Acceptance

If the Client wishes to proceed with the proposed CRM implementation services, the parties may confirm their intent by signing below. Following acceptance, the Provider may prepare a formal services agreement or statement of work reflecting the finalized project scope.

Signatures

Provider

Name

Date

Signature

Client

Name

Date

Signature



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