

CRM Connector Fast Start

Claude or ChatGPT connected to Salesforce or HubSpot through MCP with least-privilege access, three tested workflows and audit logging, in two weeks.


PRICE

From \$15,000

TIMELINE

2 weeks

PACKAGE TYPE

Implementation

WHAT'S INCLUDED

- Claude or ChatGPT connected to Salesforce or HubSpot through MCP or the vendor's native connector
- Least-privilege integration user and permission set
- Read access to up to 5 objects and write to 1
- 3 tested prompts or workflows (e.g. account brief, meeting prep, note logging)
- Audit logging enabled
- 1 training
- A free 1-hour setup walkthrough is offered to existing clients

NOT INCLUDED

- Custom MCP server development
- Writes to more than 1 object
- Team Rollout work

You provide

- CRM admin to approve the integration user and permissions
- Claude or ChatGPT workspace in place

Assumptions

- Delivered remotely, in English

Done means: Three workflows run against production data for a pilot group; audit log shows each call.

COMMON QUESTIONS

What is MCP? Model Context Protocol is the open standard Claude and ChatGPT use to read and write systems like Salesforce and HubSpot through governed connectors, with the permissions you set.

Is it safe to let Claude write to our CRM? The Fast Start scopes writes to one object through a dedicated integration user, so the assistant can log notes or update a field but nothing else, and every call is logged.

Standard on every package. Every Launch package includes a named senior consultant from kickoff to go-live, a written project plan, weekly status, build and test in a sandbox where the platform has one, one UAT cycle, admin documentation, recorded training and 30 days of hypercare. Never included: software licenses, custom code unless listed, integrations not named, content beyond the numbers listed, legal or compliance approval, on-site work and travel.



Talk to a senior consultant

vantagepoint.io/packages/ai-crm-connector-fast-start

Book a free 30-minute CRM assessment: vantagepoint.io/get-started
Full scope, FAQs and the latest price are on the package page.