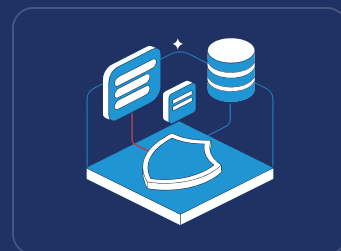


AI + CRM Jumpstart

From pilot to production in 4 to 6 weeks: the Team Rollout, the CRM connector, three production workflows with approval gates and audit trails, a prompt library and training.



PRICE

From \$35,000

TIMELINE

4-6 weeks

PACKAGE TYPE

Implementation

WHAT'S INCLUDED

- Team Rollout plus CRM Connector Fast Start
- 3 production workflows built from Vantage Point templates
- Approval gates, audit trail and human review on each
- Prompt library
- 3 trainings
- 30-day adoption review

NOT INCLUDED

- More than 3 workflows
- Custom agents (see AI Agent Build)
- Data cleanup
- Anthropic, OpenAI, Salesforce or HubSpot licenses and usage

You provide

- Workflow owners for each of the 3 workflows
- Compliance sign-off on the approval gates

Assumptions

- Delivered remotely, in English

Done means: Three workflows in production use by the pilot group; adoption review delivered.

COMMON QUESTIONS

How long does it take to put Claude into production with our CRM? Four to six weeks for the Jumpstart: workspace, connector, three workflows with controls, training and a 30-day review.

Does it work with HubSpot as well as Salesforce? Yes. The connector and workflows are built for whichever CRM you run; the Jumpstart has been scoped for both.

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-jumpstart

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