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AUSTRALIAN DIGITAL AGENCY

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CHECKLIST FOR AUSTRALIAN BUSINESSES

Budgeting for a custom CRM?
Ten things that drive the cost.

Tick each item that applies to your CRM. More ticks usually means a bigger build. Use the list to scope a smaller first version.

- [ ] **01** **Number of user roles** — Each role with different views and permissions adds work. — Cost driver
- [ ] **02** **Number of integrations** — Accounting, email, phone, forms and other systems. — Cost driver
- [ ] **03** **Data migration** — Moving and cleaning records from spreadsheets or an old system. — Cost driver
- [ ] **04** **Custom workflows and approvals** — Rules for how records move between stages. — Cost driver
- [ ] **05** **Reporting and dashboards** — Built-in reports versus a connected BI tool. — Cost driver
- [ ] **06** **Mobile access** — Responsive web, or a dedicated app. — Cost driver
- [ ] **07** **Security and privacy requirements** — Access controls, audit logs and Australian hosting. — Built in, not extra
- [ ] **08** **Ongoing running costs** — Hosting, maintenance and improvements each year. — After launch
- [ ] **09** **Subscription alternatives checked** — HubSpot, Zoho, Pipedrive or Dynamics compared over five years. — Do this first
- [ ] **10** **A small first version defined** — One team, the core records and one or two integrations. — Lower risk

The five-year view

Compare a custom build plus running costs with subscription fees for every user over five years. Custom wins only when your process truly does not fit.

Privacy is part of the budget

If the Privacy Act covers your business, security for personal information is a requirement from day one.

Full guide: high10.com.au/blog/how-much-does-custom-crm-development-cost

0406 996 050 | team@high10.com.au

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