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AUSTRALIAN DIGITAL AGENCY

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CHECKLIST FOR AUSTRALIAN BUSINESSES

Building a CRM from scratch? Ten budget checks.

Use this before you ask for quotes. Tick each item you have thought through. Each one changes where the money goes.

- [ ] **01** **Discovery and design are budgeted** — Working out the records, workflows and screens before building. — Phase 1
- [ ] **02** **Version one scope is fixed** — The smallest system your team can use daily. — Phase 2
- [ ] **03** **Integrations are counted** — Each connected system adds build and testing time. — Cost driver
- [ ] **04** **Data migration is included** — Cleaning and moving old records takes real time. — Often missed
- [ ] **05** **Testing is budgeted** — With real users and real data before launch. — Phase 3
- [ ] **06** **Training and launch are planned** — Time for staff to learn and give feedback. — Phase 4
- [ ] **07** **Security is in the budget** — Access controls, audit logs and secure hosting. — Not an extra
- [ ] **08** **Running costs are estimated** — Hosting, maintenance and improvements each year. — After launch
- [ ] **09** **Cheaper paths checked first** — Subscription CRMs, or a subscription CRM with custom add-ons. — Do this first
- [ ] **10** **Change requests have a process** — How new ideas are priced and scheduled. — Controls cost

Two cheaper paths to check

A subscription CRM configured to your process, or a subscription CRM with a small custom integration or portal. Both are often enough.

What makes builds expensive

Many user roles, many integrations, complex permissions, poor data quality and changing requirements mid-build.

Full guide: high10.com.au/blog/how-much-does-it-cost-to-build-a-crm-from-scratch

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