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AUSTRALIAN DIGITAL AGENCY

WEBSITES | APPS | AI | AUTOMATION

CHECKLIST FOR AUSTRALIAN BUSINESSES

Hiring a CRM developer? Ten things to settle first.

Tick each item as you settle it. The first one decides whether you need a developer at all.

- [ ] **01** **You have checked subscription CRMs** — Ask first
  HubSpot, Zoho, Pipedrive or Dynamics tested against your process.
- [ ] **02** **Daily tasks the CRM must support are listed** — The brief
  Who does what, every day, in plain words.
- [ ] **03** **Records and relationships are sketched** — The brief
  Customers, contacts, jobs, quotes and how they connect.
- [ ] **04** **Integrations are listed** — Scope
  Accounting, email, phone, forms and other systems.
- [ ] **05** **A small first version is defined** — Lower risk
  One team and the core records first.
- [ ] **06** **Developers compared on live systems** — Comparison
  Systems they built that are still in daily use.
- [ ] **07** **Pricing model chosen** — Contract
  Fixed price, time and materials, or retainer.
- [ ] **08** **Contract covers ownership and IP** — Contract
  Code, data and accounts belong to your business.
- [ ] **09** **Privacy obligations understood** — Compliance
  Australian Privacy Principles and secure hosting.
- [ ] **10** **Support after launch agreed** — Support
  Fixes, updates and improvements, with response times.

What the contract must say

Who owns the code and data, how changes are priced, what support covers, how data is returned if you leave, and where it is hosted.

Warning signs

A developer who never suggests an off-the-shelf option, quotes for everything at once, or keeps the code in their own accounts.

Full guide: high10.com.au/blog/how-to-hire-a-crm-software-development-company

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Book a scoping call