



# CRM Implementation + Integration

project

Prepared for Sayer Strategies

## Proposal Details

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## Scope of Work

Total Items: **7**

Estimated Hours:

**015.0015.0025.0015.0060.0015.0020.00h**

### CRM Setup (1 items, 015.00h)

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**2 CRM Setup****15.00 hours****USER STORY**

Top Smile Orthodontics wants to implement HubSpot CRM to centralize lead management and replace their current Excel-based callback system

**RECOMMENDED APPROACH**

- Configure HubSpot CRM portal with proper user permissions and team access
- Set up lead lifecycle stages from initial contact to patient conversion
- Create custom properties for orthodontic-specific data (treatment type, insurance info, etc.)
- Configure lead sources and attribution tracking foundation
- Set up basic contact and deal record structure
- Install HubSpot tracking code on Wix website

**ASSUMPTIONS**

- HubSpot Professional tier will be sufficient for initial implementation (Marketing Hub Enterprise needed for Story 4)
- Team has 3-5 users who need access to the CRM

**Data Migration (1 items, 015.00h)**

**3 Data Migration** 15.00 hours**USER STORY**

Top Smile Orthodontics wants to migrate their existing callback list and patient data from Excel spreadsheets into HubSpot CRM

**RECOMMENDED APPROACH**

- Export and clean existing Excel callback data
- Standardize data formats and remove duplicates
- Map Excel fields to HubSpot contact properties
- Import historical lead and callback data into HubSpot
- Validate data integrity post-migration

**ASSUMPTIONS**

- Excel data is reasonably clean and structured
- Historical data volume is manageable (under 50,000 records)
- Team can provide access to all relevant Excel files

**Marketing Attribution (1 items, 025.00h)**

**4 Marketing Attribution**

25.00 hours

**USER STORY**

Top Smile Orthodontics wants to implement a Buyer Episode Deal Attribution Model to accurately track which marketing interactions drive appointment bookings and patient conversions

**RECOMMENDED APPROACH**

- Create custom contact property 'Buyer Episode Trigger' to capture the first interaction in each buyer episode
- Create corresponding deal property to lock attribution when deals are created
- Set up workflow automation to stamp Buyer Episode Trigger based on interaction hierarchy (Instagram, Facebook, Google Ads, organic search, direct traffic)
- Configure 60-day episode timeout logic to end episodes and allow new attribution
- Implement UTM tracking codes for all social media and Google ad campaigns to capture interaction sources
- Set up conversion tracking on website appointment booking widget
- Build workflow to copy Buyer Episode Trigger value to deal records upon deal creation
- Create custom reports showing deal attribution by episode trigger source
- Configure interaction tracking for Instagram posts, Facebook ads, Google Ads clicks, and organic search

- Website appointment widget can be modified to include tracking parameters
  - UTM parameters can be maintained through the booking flow
  - 60-day episode timeout period aligns with typical patient decision timeline
- Team will maintain consistent UTM parameter structure across campaigns

## Marketing Automation (1 items, 015.00h)

**6 Marketing Automation**      **15.00 hours****USER STORY**

Top Smile Orthodontics wants to automate their follow-up process for leads who don't immediately book appointments

**RECOMMENDED APPROACH**

- Create an automated email sequence for leads who visit website but don't book
- Set up an SMS follow-up workflow for appointment no-shows
- Build a nurture campaign for leads who inquire but don't schedule
- Set up lead scoring to prioritize high-intent prospects

**ASSUMPTIONS**

- Team will provide email templates and messaging content
- SMS integration available through HubSpot or third-party service

**PMS Integration (1 items, 060.00h)**

**8 PMS Integration**      **60.00 hours**

### USER STORY

Top Smile Orthodontics wants comprehensive integration with Gray Finch PMS to automatically sync appointment data, patient information, and treatment details between systems

### RECOMMENDED APPROACH

- Set up API authentication and connection to Gray Finch system
- Configure automated appointment sync from Gray Finch to HubSpot with real-time status updates
- Implement patient data synchronization including demographics, contact info, and insurance details
- Set up automated patient lifecycle tracking from lead to active treatment to completion
- Configure appointment reminder automation based on Gray Finch scheduling data
- Implement treatment milestone tracking and automated follow-up workflows
- Set up patient retention campaigns based on treatment completion status

### ASSUMPTIONS

- API rate limits will accommodate real-time or near real-time sync requirements

**10      Project Management      15.00 hours****USER STORY**

Top Smile Orthodontics wants coordinated project management to ensure smooth implementation and integration of all marketing and CRM components

**RECOMMENDED APPROACH**

- Coordinate implementation timeline across all workstreams
- Manage stakeholder communication and progress updates
- Facilitate discovery sessions and requirements gathering
- Coordinate with Gray Finch support team for integration discussions
- Manage testing phases and user acceptance validation
- Provide project status reporting and milestone tracking

**ASSUMPTIONS**

- Weekly check-in calls during implementation phase
- Key stakeholders available for discovery and testing sessions
- Implementation timeline of 6-8 weeks total

**Testing (1 items, 020.00h)**

**11****Testing****20.00 hours****USER STORY**

Top Smile Orthodontics wants comprehensive testing to ensure accurate Buyer Episode attribution tracking, data sync, and automated workflows before going live

**RECOMMENDED APPROACH**

- Test Buyer Episode Trigger attribution logic across all marketing channels (Instagram, Facebook, Google Ads, organic)
- Validate 60-day episode timeout functionality and new episode creation
- Test attribution copying from contact to deal records upon deal creation
- Validate data sync between website, Gray Finch, and HubSpot for appointments, patients, and treatments
- Test all automated workflows and email sequences
- Verify custom attribution reporting accuracy and dashboard functionality
- Conduct user acceptance testing with team members
- Test edge cases and error handling scenarios for PMS integration
- Validate campaign tracking with UTM parameters across all marketing channels
- Test patient lifecycle automation and treatment milestone tracking
- Verify appointment reminder automation and patient retention workflows

- Test appointments and patient records can be created in Gray Finch system for validation
- Team available to participate in user acceptance testing
- All integrations can be tested in production environment
- HIPAA compliance testing can be conducted with sample data
- Test marketing campaigns can be created to validate attribution model

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This proposal is valid for 30 days from the date of issue.

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