CORPORATE SYNERGY SOLUTIONS

ONE-PAGE OVERVIEW

FIXED-SCOPE BUILDS · TIER 2

Team System

Getting out of messy spreadsheets or bloated off-the-shelf software into a clean custom CRM, or putting a custom AI assistant to work inside your company tools.

$7,500
fixed price

DELIVERY	BEFORE THE BUILD	AFTER LAUNCH	PAYMENT
3–4 weeks	Optional $1,000 Diagnostic, paid separately	30 days of Synergy Care included	In full, 50/50, thirds, or financed

WHAT QUALIFIES AS A TEAM SYSTEM

Choose a CRM or an AI assistant, within these limits:

- ✓ For a CRM: up to 4 core records (for example leads, customers, opportunities, and invoices), 4 views (a table, a pipeline board, a record page, and an invoice view), 1 user role for your team, and 2 standard integrations
- ✓ For an AI assistant: 1 custom assistant with a knowledge base of up to 500 documents, up to 4 standard app integrations, and 3 core actions
- ✓ Data moved in from 1 clean CSV, up to 5,000 records
- ✓ Either one includes 1 user role for your team

A small overage is a Module: an integration for $1,200, a screen for $1,500, or an AI skill for $1,500. If your build plus its Modules would cost as much as the next tier, we quote the next tier instead. Anything past these limits that isn't a Module is quoted at $350/hour, in writing, before the build starts.

IS THIS THE RIGHT SIZE?

Only one process to automate, with no logins? A Workflow Automation ($3,500) may be enough.

Need more than 4 types of records, more than 1 user role, or workflows across departments? Consider an Operations System ($14,500): up to 7 types of records, 2 roles and 3 automated workflows.

Turn that pipeline into a Synergy Core when you want a clean, custom CRM for your leads, customers, opportunities, and invoices.

EVERY BUILD INCLUDES

- Built as professional, full-code software. No bloated low-code templates and no vendor lock-in: you own clean, production-grade code.
- A 14-day tuning and user acceptance testing window after launch
- 30 days of Synergy Care after launch: we host it, watch it, and handle early adjustments.
- A fixed price, agreed before the first payment.

WHAT YOU CAN BUILD HERE

A basic custom CRM
A fast web app built around your sales and billing flow: leads, customers, opportunities on a pipeline, and invoices, with nothing you don't use.

A connected AI assistant
Connected to your email, calendar, CRM, and internal documents. It preps meeting briefs, drafts replies, answers questions from company knowledge, and updates records.

WHERE REAL IDEAS LAND AT THIS TIER

The sales, operations, and client system
You leave the spreadsheets behind. We code a clean CRM just for your team: leads, customers, opportunities on a visual pipeline, and invoices, in one fast screen, connected to your email and Stripe.

The team training and enablement system
An AI coach and SOP assistant trained on your videos, documents, and playbooks. Staff ask it questions any time ("How do I process a warranty claim?") or practice a customer conversation with it first.

> **Synergy Core: Your core record, or an AI assistant wired into your tools.**

THE TERMS

- Delivery time counts from kickoff: scope signed, first payment cleared, and the access and data in your scope received. If we're waiting on you, the clock pauses. For a build that starts with the Diagnostic, kickoff comes after the readout.
- Pay in full up front, half to start and half at launch, or in thirds: at the start, at a working demo midway, and at launch.
- Financing is available from a Team System up, with terms set in your proposal.
- Full refund within 3 days of a build's first payment. After that the work has started, and the scope you approved stands.

Book a scope call: www.corporatesynergysolutions.com/book?topic=build · or get the free Snapshot to see where your idea lands
anthony@corporatesynergysolutions.com · (425) 435-7747 · Prices and terms as of November 4, 2026. Your signed scope and agreement govern.