



HUBSPOT CRM

Implementation & Onboarding Agreement

A HubSpot CRM configured around how your business really sells — pipelines, lead capture, automation and reporting, delivered against an agreed scope, with your team trained and confident from day one.

Agreement details	
Agreement reference	_____
Date of agreement	_____
Prepared by	_____, Webxxs Services Ltd

Parties

Supplier	Client
Webxxs Services Ltd (trading as Webxxs) Company no. 17077640 (England and Wales) Suite A, 82 James Carter Road Mildenhall, Bury St Edmunds IP28 7DE contact@webxxs.com Tel: +44 115 647 3819	_____ Company no. _____ _____ _____

Together "the parties". In this Agreement, "Webxxs", "we", "us" and "our" mean Webxxs Services Ltd, and "the Client", "you" and "your" mean the business named above.

Background

- A. Webxxs designs, configures and implements HubSpot CRM systems for UK businesses, and trains their teams to use them.
- B. The Client wishes to engage Webxxs to implement HubSpot, and where selected to onboard and train its team, using the package and modules selected in Schedule 1.
- C. This Agreement sets out how the implementation will be scoped, delivered, tested, paid for and handed over, and the responsibilities of each party, including for the Client's data.

1. Definitions and interpretation

1.1 In this Agreement:

"Agreement" means this HubSpot Implementation and Onboarding Agreement, including its Schedules and the documents incorporated by reference in clause 2.



"Business Day" means Monday to Friday, excluding bank and public holidays in England.

"Change Request" means any request by the Client to add to, remove from or alter the Specification after it has been agreed.

"Client Data" means all data the Client supplies, imports or creates in the HubSpot Portal, including contacts, companies, deals, emails and files.

"Discovery" means the workshops, process mapping and review carried out under clause 4 to define the Specification for an Implementation Package.

"Go-Live" means the point at which the Client's team starts using the configured HubSpot Portal for live business activity.

"HubSpot" means the HubSpot software platform provided by HubSpot, Inc. and its group companies.

"HubSpot Portal" means the Client's HubSpot account identified in Schedule 2.

"HubSpot Subscription" means the Client's own subscription to HubSpot (including any Hubs, tiers, seats and add-ons), purchased directly from HubSpot.

"Hourly Rates" means the Webxxs Specialist Rate of £150 per hour and Administration & Support Rate of £30 per hour, as updated from time to time on 30 days' written notice.

"Package" means the implementation package selected in Schedule 1.

"Post-Launch Support Period" means the period after handover set out in clause 16.

"Pre-existing Materials" means materials, templates, property and pipeline frameworks, workflow designs, training materials, methods, know-how and tools owned or licensed by Webxxs before or independently of this Agreement.

"Project" means the work described in Schedule 1, Schedule 2 and, for an Implementation Package, the Scope Document.

"Scope Document" means the written implementation plan produced at the end of Discovery under clause 4, setting out the agreed deliverables, fees and timeline.

"Specification" means the package inclusions in Schedule 1, the details in Schedule 2 and, where applicable, the approved Scope Document, together with any agreed Change Requests.

"Third-Party Services" means software, platforms and services provided by anyone other than Webxxs, including HubSpot, Google, Microsoft, Zapier, booking, quoting and payment systems.

"Website Policies" means the documents published on webxxs.com and listed in clause 2.2.

"Writing / written" means includes email, but not text messages, WhatsApp or social media messages unless confirmed by email.

- 1.2** Headings do not affect interpretation. Words such as "including" and "for example" do not limit the words before them. A reference to a law includes that law as amended or replaced.

2. Webxxs Terms, Website Policies and order of precedence

- 2.1** This Agreement incorporates the Webxxs Sales Terms and Conditions published at webxxs.com/terms-conditions ("the Webxxs Terms"), in the version in force on the date of this Agreement. By signing, the Client confirms it has read and accepts them.
- 2.2** The following Website Policies also apply to the Project, in the version in force on the date of this Agreement:



Policy	Where to find it
Privacy Policy	webxxs.com/privacy-policy
GDPR Policy	webxxs.com/gdpr-policy
Response Time Policy	webxxs.com/response-time-policy
Complaints Policy & Escalation Procedure	webxxs.com/complaints-policy
Abuse Reporting Policy	webxxs.com/abuse-reporting-policy

- 2.3** If there is any conflict between documents, they take priority in this order: (a) the approved Scope Document; (b) Schedule 2 (Project Details); (c) the main body of this Agreement; (d) Schedule 1; (e) the Webxxs Terms; (f) the Website Policies.
- 2.4** Changes Webxxs makes to the Webxxs Terms or Website Policies after this Agreement is signed will not apply to the Project unless the Client agrees in writing, except for changes required by law. The Client's own terms of business do not apply unless agreed in writing by a Director of Webxxs.
- 2.5** Where the Client buys a package through a Webxxs online payment link, this Agreement sets out the full terms of that purchase and applies from the date of payment, whether or not it has been signed, provided it was made available to the Client before or at the point of purchase.

3. Packages and scope

- 3.1** Webxxs will deliver the Project in line with the Specification. The Package and any optional modules are selected in Schedule 1 and detailed in Schedule 2.
- 3.2** HubSpot Starter Setup is a fixed-scope, fixed-price package with the inclusions listed in Schedule 1, Part C. It does not require Discovery.
- 3.3** The HubSpot Implementation Package is scoped through Discovery. The deliverables, fees and timeline are confirmed in the Scope Document, which forms part of the Specification once approved.
- 3.4** Anything not expressly included in the Specification is excluded. Unless listed, the Project does not include: the HubSpot Subscription or any other Third-Party Services; data cleansing beyond basic formatting for import; copywriting for emails, sequences or templates beyond that stated; website design or build (covered by the Webxxs Website Design Project Agreement); custom-coded integrations; or ongoing administration after the Post-Launch Support Period.

4. Discovery and the Scope Document

- 4.1** For an Implementation Package, Webxxs will run Discovery with the Client. This normally includes workshops to map the Client's sales and marketing process, customer journey, lifecycle stages, data sources, integrations, reporting needs and team roles.
- 4.2** Within ten Business Days of completing Discovery, Webxxs will provide a Scope Document setting out the deliverables, fees, payment milestones, assumptions and target timeline.
- 4.3** The Client will review the Scope Document and either approve it or request reasonable amendments within five Business Days. The Scope Document is approved when the Client confirms in writing or, if the Client gives no feedback within seven days, at the end of that period.



- 4.4** The Discovery fee set out in Schedule 2 is payable before Discovery starts. If the Client proceeds with the implementation within 60 days of receiving the Scope Document, the Discovery fee will be credited against the implementation fee. If the Client decides not to proceed, the Discovery fee is non-refundable, and the Client may keep and use the Scope Document for its own business.

5. Project process and timescales

- 5.1** The Project will normally follow these stages, as relevant to the Package: (1) Discovery and scoping; (2) portal set-up and configuration (properties, pipelines, lifecycle stages, users and permissions); (3) data import; (4) lead capture, integrations and automation; (5) testing and Client review; (6) training and onboarding; (7) Go-Live and handover; (8) post-launch support.
- 5.2** Webxxs will start work once the relevant payment in clause 14 has been received and the access in clause 7 has been granted.
- 5.3** All dates are estimates and depend on the Client meeting its responsibilities on time. Time is not of the essence. Where the Client causes a delay, Webxxs may move the Project to its next available slot, which may delay Go-Live by more than the length of the Client's delay.
- 5.4** Webxxs decides the method, tools and order in which work is carried out, and may use suitably qualified employees or subcontractors. Webxxs remains responsible for work carried out by its subcontractors.

6. The Client's HubSpot Subscription

- 6.1** The Client contracts directly with HubSpot for its HubSpot Subscription and is responsible for choosing the Hubs, tiers and seats it needs, paying HubSpot's fees, and complying with HubSpot's terms. Webxxs will advise on the subscription needed to deliver the Specification, but the purchase decision is the Client's.
- 6.2** Some features are only available on certain HubSpot tiers. If a deliverable requires a higher tier or add-on than the Client has, Webxxs will tell the Client and propose an alternative. Upgrading is at the Client's cost.
- 6.3** Webxxs is independent of HubSpot and is not affiliated with, endorsed by or sponsored by HubSpot. Webxxs is not responsible for HubSpot's availability, performance, security, pricing, contract renewals, usage limits, or changes to its features, which HubSpot may make at any time. Rework needed after HubSpot changes its platform is chargeable at the Hourly Rates or covered under a Monthly Support Subscription.
- 6.4** Webxxs may receive a referral commission or other benefit from HubSpot or other software providers it recommends. This does not increase the price the Client pays to those providers, and Webxxs will only recommend software it considers suitable for the Client's needs.

7. Access to the HubSpot Portal

- 7.1** The Client will keep Super Admin ownership of the HubSpot Portal at all times. During the Project, the Client will add Webxxs as a user with the permissions needed to deliver the Specification, normally Super Admin, using HubSpot's user-invite feature. Passwords must never be shared by plain email or messaging apps.
- 7.2** Webxxs will use its access only to carry out the Project and will act on the Client's instructions.



- 7.3** At handover, Webxxs will reduce its permissions or remove its user, as the Client chooses, unless the Client has a Webxxs Monthly Support Subscription that requires continued access.

8. Data import and data quality

- 8.1** Where the Project includes a data import, the Client will supply its data in the format Webxxs reasonably requests (normally CSV files with one header row) by the date in the Project plan, up to the record volumes stated in Schedule 1 or the Scope Document. Additional volumes or data sources are Change Requests.
- 8.2** The Client is responsible for the accuracy, completeness and quality of its data, including removing duplicates and out-of-date records, unless data cleansing is included in the Specification. Webxxs will import the data with reasonable care, but is not responsible for problems caused by the quality or structure of the source data.
- 8.3** The Client will keep a complete backup of all source data before it is supplied, and of the HubSpot Portal before any bulk change. HubSpot does not always allow bulk changes or deletions to be reversed.
- 8.4** The Client confirms that it has a lawful basis under Data Protection Law for every contact it imports or asks Webxxs to import, and, where it intends to send marketing emails or messages, that it holds any consent required by the Privacy and Electronic Communications Regulations 2003. Webxxs will not send marketing communications to the Client's contacts, or set contacts as marketing contacts, except on the Client's written instruction.

9. Integrations

- 9.1** Webxxs will configure the integrations listed in Schedule 2 or the Scope Document, using the methods available from each Third-Party Service at the time (such as HubSpot's native integrations, Zapier or APIs), and will test that data passes between the systems as described.
- 9.2** The Client will hold its own accounts with each Third-Party Service, at the subscription level needed for the integration, and is responsible for their cost.
- 9.3** Third-Party Services can change, limit or withdraw their features, connectors, APIs and pricing at any time. Webxxs is not responsible for an integration failing because of such a change after it has been delivered and tested. Rework is chargeable at the Hourly Rates or covered under a Monthly Support Subscription.

10. Automation, workflows and emails

- 10.1** Webxxs will build the workflows, sequences, email templates and other automation set out in the Specification and test them before activation.
- 10.2** No workflow or sequence that sends emails or messages to the Client's contacts will be switched on until the Client has approved it in writing. The Client is responsible for the content, timing and legal compliance of every communication it approves, and should check enrolment criteria carefully.
- 10.3** Webxxs is not responsible for communications sent, or records changed, by automation that the Client has approved, or that the Client or its users have edited or switched on.



11. Client responsibilities

11.1 The Client will:

- (a) nominate one decision-maker with authority to approve the Scope Document, deliverables and Change Requests, and make that person and other key staff available for Discovery workshops and reviews;
- (b) give accurate information about its sales and marketing processes, products and team, and give consolidated feedback within five Business Days of each request;
- (c) grant the access in clause 7 and keep its HubSpot Subscription and other Third-Party Services active and paid;
- (d) supply data and content by the agreed dates in line with clause 8;
- (e) make sure the users to be trained attend the scheduled training sessions; and
- (f) test the configured portal thoroughly during the review stage.

11.2 Webxxs is not responsible for any delay, defect or additional cost caused by the Client not meeting these responsibilities. Additional time caused by them is chargeable at the Hourly Rates.

12. Review, acceptance and Change Requests

12.1 When the configuration is ready, Webxxs will ask the Client to review and test it. The Client will report any failure to meet the Specification in writing within five Business Days. Webxxs will fix reported failures, and the Package includes up to two rounds of revisions to the configuration.

12.2 The configuration is accepted when the Client confirms in writing, when the Client starts using the HubSpot Portal for live business activity, or, if the Client gives no feedback, seven days after the review request, whichever happens first.

12.3 Requests that go beyond the Specification are Change Requests. Webxxs will confirm the effect on fees and timescales, and a Change Request is binding only when both parties confirm it in writing. Unless a fixed price is quoted, Change Requests are charged at the Hourly Rates.

13. Paused and dormant projects

13.1 If the Client does not supply data, feedback, approvals, access or payment that Webxxs has requested for 30 days, after Webxxs has sent at least two written reminders, Webxxs may pause the Project by written notice.

13.2 If a paused Project remains inactive for a further 30 days, Webxxs may close it by written notice. On closure, the Client will pay for all work completed up to the date of closure, valued at the Hourly Rates, but not less than the payments already due and never more than the total fees for the Project. If the Client later wishes to restart, a restart fee equal to two hours at the Specialist Rate (£300) will apply and the Project will be scheduled into Webxxs's next available slot.

14. Fees and payment

14.1 The fees are set out in Schedule 1, Schedule 2 and, for an Implementation Package, the Scope Document. Unless a different schedule is agreed in writing:

- (a) HubSpot Starter Setup is payable in full before work starts;



- (b) for an Implementation Package, the Discovery fee is payable before Discovery starts; 50% of the implementation fee (less any Discovery fee credited under clause 4.4) is payable on approval of the Scope Document; and the balance is payable before Go-Live and handover; and
- (c) optional modules are payable as stated in Schedule 2.

- 14.2** Go-Live support and handover will take place only once all fees due (including agreed Change Requests) have been paid in full.
- 14.3** Invoices are payable within seven days of the invoice date, without set-off or deduction. Payment may be made by bank transfer, card or Direct Debit through Webxxs's payment provider (currently Stripe), against invoices or payment links issued through Webxxs's accounting or CRM system (currently Xero or HubSpot).
- 14.4** Webxxs is not currently registered for VAT, so no VAT is charged on the fees. If Webxxs becomes VAT registered before the Project is complete, it will give the Client at least 30 days' written notice, and VAT will then be added at the applicable rate to fees invoiced from the date of registration.
- 14.5** If any amount is not paid when due, Webxxs may, without affecting its other rights: (a) charge interest and fixed-sum compensation under the Late Payment of Commercial Debts (Interest) Act 1998, at 8% a year above the Bank of England base rate; (b) suspend work on giving three days' written notice; and (c) withhold Go-Live support, training and handover until all overdue amounts are paid. Webxxs will never withhold the Client's access to its own HubSpot Portal or data. The Client will reimburse Webxxs's reasonable costs of recovering overdue sums.
- 14.6** In line with the Webxxs Terms, payments are non-refundable once work has started, except where Webxxs terminates under clause 22.3 on notice, or the Client terminates under clause 22.4 because of Webxxs's breach, in which case Webxxs will refund any fees paid for work not yet carried out.

15. Training and onboarding

- 15.1** Webxxs will provide the training included in the Package or the Scope Document, for the number of users and sessions stated in Schedule 2. Sessions are normally delivered online and may be recorded.
- 15.2** Training materials, guides and recordings are for the Client's internal use only and may not be shared outside the Client's organisation or resold.
- 15.3** Sessions cancelled by the Client with less than two Business Days' notice, or not attended, count as delivered. Additional training is available at the Hourly Rates.
- 15.4** Webxxs will support the Client's team in adopting HubSpot, but the Client is responsible for making sure its team uses the system and follows the agreed processes.

16. Post-launch support

- 16.1** After handover, Webxxs will provide email support and fix, free of charge, any failure of the configuration to meet the Specification reported in writing during the Post-Launch Support Period. This is 14 days for HubSpot Starter Setup and 30 days for an Implementation Package, unless Schedule 2 states otherwise.
- 16.2** Post-launch support does not cover new requirements, additional training, changes made by the Client's users or other suppliers, or problems caused by HubSpot or other Third-Party Services.



These are chargeable at the Hourly Rates or covered under a Webxxs Monthly Support Subscription, which Webxxs recommends to keep the system optimised as the Client's business grows.

17. Intellectual property

- 17.1** The Client owns its HubSpot Portal and Client Data at all times.
- 17.2** Ownership of the configurations, workflows, templates, reports and documentation created specifically for the Client passes to the Client when all fees for the Project have been paid in full. Until then, the Client has a licence to use them, which Webxxs may withdraw if payment is not made when due.
- 17.3** Webxxs retains ownership of its Pre-existing Materials. Where they are included in the deliverables, Webxxs grants the Client a non-exclusive, perpetual, royalty-free licence to use them within its own business, once all fees are paid.
- 17.4** Unless the Client asks otherwise in writing, Webxxs may refer to the Client by name and describe the Project (without disclosing Client Data or confidential information) in its portfolio, case studies and marketing.

18. Confidentiality

- 18.1** Each party will keep confidential all information about the other party's business, clients, systems, processes, pricing and data that it receives in connection with this Agreement, and will use it only to perform this Agreement.
- 18.2** This does not apply to information that is or becomes public (other than through a breach of this clause), was already lawfully known to the receiving party, is independently developed, or must be disclosed by law or a regulator. This clause continues for five years after this Agreement ends.

19. Data protection

- 19.1** Each party will comply with the UK General Data Protection Regulation, the Data Protection Act 2018 and the Privacy and Electronic Communications Regulations 2003 ("Data Protection Law").
- 19.2** The Client is the controller of the Client Data. HubSpot processes the Client Data under the Client's own contract with HubSpot. Where Webxxs accesses or processes Client Data to deliver the Project, Webxxs acts as the Client's processor and will: process the data only on the Client's documented instructions; ensure people with access are bound by confidentiality; apply appropriate technical and organisational security measures, including two-factor authentication on its HubSpot user account; use sub-processors only under written terms giving equivalent protection; assist the Client with data subject requests and security obligations; notify the Client without undue delay, and in any event within 48 hours, of becoming aware of a personal data breach; delete any copies of Client Data it holds outside the HubSpot Portal at the end of the Project; and provide information reasonably needed to show compliance.
- 19.3** Further details are set out in the Webxxs GDPR Policy and Privacy Policy.

20. Warranties and outcomes

- 20.1** Each party confirms it has the authority to enter into this Agreement.



- 20.2** Webxxs will carry out the Project with reasonable skill and care and in line with good industry practice. Webxxs does not guarantee any particular business result, including revenue, leads, close rates, time savings or user adoption, or that HubSpot or any Third-Party Service will be uninterrupted or error-free.
- 20.3** Webxxs provides business-to-business services only. The Client confirms that it is entering into this Agreement in the course of its business and not as a consumer.

21. Limitation of liability

- 21.1** Nothing in this Agreement limits or excludes liability for death or personal injury caused by negligence, fraud or fraudulent misrepresentation, or any other liability that cannot be limited or excluded by law.
- 21.2** Subject to clause 21.1, Webxxs will not be liable, whether in contract, tort (including negligence), breach of statutory duty or otherwise, for any: loss of profit, revenue, sales or business; loss of anticipated savings; loss of goodwill or reputation; loss or corruption of data where the Client has not kept backups in line with clause 8.3; or indirect or consequential loss.
- 21.3** Subject to clause 21.1, Webxxs's total liability arising out of or in connection with this Agreement is limited to the total fees paid by the Client under this Agreement.
- 21.4** Webxxs is not liable for any loss caused by the Client Data, the Client's instructions, communications or automation approved under clause 10, changes made by the Client's users or other suppliers, HubSpot or other Third-Party Services, or the Client's failure to meet its responsibilities under clauses 8 and 11.
- 21.5** The Client will indemnify Webxxs against any claim, fine or loss arising from the Client's lack of a lawful basis or consent for Client Data, or from communications the Client has approved.
- 21.6** The parties agree that these limits are reasonable, having regard to the fees, the nature of the Project, the Client's control over its data and communications, and the availability of insurance.

22. Term and termination

- 22.1** This Agreement starts on the date it is signed by both parties (or the date of payment under clause 2.5, if earlier) and ends when the Post-Launch Support Period ends, unless terminated earlier under this clause.
- 22.2** The Client may terminate this Agreement at any time by written notice. If it does, the Client will pay for all work completed up to the date of termination, valued at the Hourly Rates, but in any event not less than the Discovery fee and any payments already due, and never more than the total fees for the Project.
- 22.3** Webxxs may terminate this Agreement by written notice: immediately, if any amount is more than 14 days overdue; under clause 13; if the Client uses HubSpot or the deliverables in breach of the Abuse Reporting Policy or the law; or on 14 days' notice for any other reason, in which case Webxxs will refund fees paid for work not yet carried out.
- 22.4** Either party may terminate this Agreement immediately by written notice if the other party: commits a material breach which is not remedied within 14 days of being asked in writing to remedy it; or becomes insolvent, enters administration, liquidation or a voluntary arrangement, has a receiver appointed, or ceases to trade.



- 22.5** On termination, all outstanding invoices become immediately due, and clause 23 applies once all sums due are paid.
- 22.6** Clauses 8.4, 14, 17, 18, 19, 21, 22.2, 22.5, 22.6, 23, 24, 26, 27 and 28 continue after this Agreement ends.

23. Handover

- 23.1** At handover, and once all fees have been paid, Webxxs will: confirm the Client has Super Admin control of the HubSpot Portal and any connected accounts created for the Project; provide the documentation and guides included in the Package; and adjust or remove its user access under clause 7.3.
- 23.2** After handover, the Client is responsible for administering its HubSpot Portal, including user management, data quality and keeping automation up to date, unless covered by a Webxxs Monthly Support Subscription.

24. Non-solicitation

- 24.1** During this Agreement and for 12 months after it ends, the Client will not, without Webxxs's written consent, directly or indirectly engage, employ or solicit any employee or subcontractor of Webxxs who has been involved in the Project.
- 24.2** If the Client breaches clause 24.1, it will pay Webxxs a fee equal to 25% of that person's first-year salary or fees, as a genuine pre-estimate of Webxxs's recruitment, replacement and training costs.

25. Events outside our control

- 25.1** Neither party is liable for any delay or failure to perform caused by events beyond its reasonable control, including HubSpot or other platform outages, cyber-attacks, internet or power failures, extreme weather, pandemic, industrial action or government action. This does not excuse the Client's obligation to pay for work already carried out.
- 25.2** If such an event continues for more than 30 days, either party may terminate this Agreement by written notice, and clause 22.5 will apply.

26. Complaints and disputes

- 26.1** If the Client is unhappy with any part of the Project, it should first follow the Webxxs Complaints Policy & Escalation Procedure.
- 26.2** If a dispute is not resolved within 30 days of being raised, the parties will consider in good faith resolving it through mediation before starting court proceedings, except where urgent relief is needed or to recover unpaid invoices.

27. General

- 27.1** Entire agreement: this Agreement, together with the documents referred to in clause 2 and the approved Scope Document, is the entire agreement between the parties about its subject matter. Each party confirms it has not relied on any statement, proposal or sales material not set out in this Agreement.



- 27.2** Variation: changes to this Agreement, including Change Requests, are effective only if agreed in writing by both parties.
- 27.3** Assignment: the Client may not transfer its rights or obligations without Webxxs's written consent. Webxxs may transfer this Agreement to a group company or to a successor to its business, on written notice.
- 27.4** Notices: notices must be in writing and sent by email to the addresses in this Agreement (or as updated by notice). An email is treated as received at the time it is sent if between 9:00am and 5:30pm on a Business Day, or otherwise at 9:00am on the next Business Day.
- 27.5** Third-party rights: no one other than the parties has any right to enforce this Agreement under the Contracts (Rights of Third Parties) Act 1999.
- 27.6** Severance: if any part of this Agreement is found invalid or unenforceable, it will be modified to the minimum extent necessary to make it enforceable, and the rest of the Agreement is unaffected.
- 27.7** Waiver: a failure or delay in exercising a right does not waive that right.
- 27.8** Relationship: nothing in this Agreement creates a partnership, joint venture or employment relationship.
- 27.9** Electronic signature: this Agreement may be signed electronically (including through PandaDoc) and in counterparts. Electronic signatures are binding and have the same effect as handwritten signatures.

28. Governing law and jurisdiction

- 28.1** This Agreement, and any dispute or claim (including non-contractual disputes or claims) arising out of or in connection with it, is governed by the law of England and Wales.
- 28.2** The courts of England and Wales have exclusive jurisdiction to settle any such dispute or claim.

Signatures

By signing below, each party agrees to be bound by this Agreement, including the Webxxs Terms and Website Policies referred to in clause 2.

Signed for Webxxs Services Ltd		Signed for the Client	
Signature		Signature	
Name	Ash Clifflen	Name	_____
Position	Director	Position	_____
Date		Date	



Schedule 1 — Package and Module Selection

Tick the package and any optional modules that apply. Package details are published at webxxs.com/pricing.

Part A — Package (select one)

	Package	Price	Best for
☐	HubSpot Starter Setup	£795	Businesses that need a properly configured HubSpot CRM, live within days.
☐	HubSpot Implementation Package	Discovery fee + fixed quote in Scope Document	Businesses needing multiple pipelines, integrations, automation and team training.
☐	Other package	As quoted	_____

Part B — Optional modules

	Module	Price	What it covers
☐	Additional onboarding & training	As quoted	Extra training sessions, users or role-based onboarding (clause 15).
☐	Data migration & cleansing	As quoted	Migration from another CRM or spreadsheets, deduplication and cleansing (clause 8).
☐	Additional integrations	As quoted	Connections to booking, quoting, payment or other systems (clause 9).
☐	Email & sequence copywriting	As quoted	Writing automated emails, templates and sequences (clause 10).

Part C — Package inclusions

Included	HubSpot Starter Setup	Implementation Package
HubSpot account set-up & configuration	✓	✓
Custom contact / company properties	Up to 3	As per Scope Document
Sales pipelines	1 pipeline, up to 5 stages	Multiple pipelines & lifecycle stages
Contact import	Up to 500 contacts	As per Scope Document
Gmail or Outlook inbox connection	✓ Two-way	✓ Two-way sync
Lead capture	1 form, connected to the CRM	Forms, pop-ups and chat with source tracking
Email templates	2 (welcome + follow-up)	Branded templates as scoped
Automation	1 workflow	Sequences, tasks, lead rotation and workflows



Included	HubSpot Starter Setup	Implementation Package
Website, calendar & quoting connections	—	✓ As scoped
Lead scoring	—	✓ As scoped
Dashboards	—	Pipeline, conversion & activity
Training	45-minute call + quick-start guide	Hands-on team training, written guides & recorded walkthroughs
Post-launch support	14 days email support	30 days

Schedule 2 — Project Details

To be completed for this Client. Where this Schedule conflicts with the main Agreement, this Schedule takes priority (subject to an approved Scope Document).

Item	Details
HubSpot Portal ID	_____
HubSpot Hubs and tiers	_____
Package	_____
Discovery fee (Implementation only)	_____
Fees and payment schedule (clause 14)	_____
Target Go-Live date	_____
Data sources and record volumes (clause 8)	_____
Integrations (clause 9)	_____
Users to be trained and number of sessions (clause 15)	_____
Webxxs access after handover (clause 7.3)	☐ Remove ☐ Reduce to: _____ ☐ Retain under Monthly Support Subscription
Client decision-maker	_____, _____, _____
Webxxs contact	Ash Clifflen, Director & CRM Architect — contact@webxxs.com — +44 115 647 3819 (mobile +44 7572 750046)
Special terms (if any)	_____