TWD DIGITAL SYSTEMS

OWNER'S BRIEFING · NEW ZEALAND

Outgrowing your software? A practical guide to owning a custom CRM

For New Zealand business owners with 4 to 25 staff who are juggling disconnected tools, rising per-user fees and manual double entry. No fluff. Just an honest look at when a private system makes sense, what it costs, and how to get started.

The short answer: if your team rekeys the same client details into three or more places, or your monthly software bill grows every time you hire, a private CRM you own outright can pay for itself while making the working day simpler.

1. Five signs you have outgrown off-the-shelf tools

- Enquiries arrive by form, email and phone, then get copied into a spreadsheet by hand.
- Bookings, quotes and invoices live in separate tools that do not talk to each other.
- You pay per user, so every new hire adds another monthly fee.
- Staff work around the software with sticky notes, reminders and side spreadsheets.
- You cannot easily see which leads have gone cold or which clients are due for rebooking.

2. What a private CRM actually does

- **One record per client**: contacts, bookings, proposals, payments and notes in one place.
- **A visual pipeline** showing every enquiry from first contact to paid job.
- **Automated follow up** by email and SMS, so nothing slips through the cracks.
- **Client portals** where customers view plans, documents and invoices without emailing your team.
- **Role-based access**, so staff see only what they need while owners see everything.

3. Subscription stack vs owning your system

	Subscription stack	Your own CRM
Monthly cost	Grows with every user	Flat care plan
Fit	You adapt to the software	Built around your workflow
Data	Spread across tools	One private home
Support	Overseas help desks	Local NZ team you know

4. Packages and transparent pricing

Foundation Setup	**NZ$4,950 + GST**	Core contacts, bookings, simple proposals and automated email.
Turnkey Solution · Most popular	**NZ$7,950 + GST**	Adds visual deal pipeline stages, digital proposal sign-off, card billing, SMS and custom team roles.
Growth Partner	**NZ$12,500 + GST**	Full client portal access, multi-tier permissions, custom integrations, team onboarding and tailored automations.

All builds include an ongoing care plan from NZ$300 + GST a month for hosting, security updates and monthly tune ups. You own the platform and never pay ballooning per-seat software bills.

5. How we work

- **Map**: a 20-minute chat about your current tools and biggest admin frustrations.
- **Design**: we sketch the pipeline, records and automations around how your team works.
- **Build**: we build, test and load your data, keeping you involved at each step.
- **Care**: local support, monthly tune ups and improvements as your business grows.

6. Questions to ask before you start

- Where does an enquiry first land today, and how many times is it retyped?
- What are you paying each month across all your software?
- Which tasks would your team gladly never do by hand again?

Book a 20-minute strategy chat with Jonathan Callinan, Founder & Managing Director.
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