

Revenue Workflow Engine

\$15,000–\$40,000

ONE-TIME BUILD

Move research, meeting notes, and follow-up into a workflow the team can repeat.

BEST FIT

Sales leaders, channel teams, business development, and revenue operations teams using Apollo, Salesforce, HubSpot, or other approved business systems.

Research lives in browser tabs, meeting commitments stay in transcripts, and the same account details are copied into several tools. PD Insights builds the selected path from source information to reviewed action, with clear ownership of the next step — usually starting with one pattern: meeting-to-pipeline, prospect-to-research, or pipeline-to-follow-up.

— What you receive

Account and prospect intelligence

Organize approved company, contact, installed-service, and account history data; distinguish recorded facts from opportunity hypotheses.

Meeting preparation

Create account briefs, discovery prompts, and relevant product context from permitted sources.

Transcript to action

Extract requirements, commitments, tasks, and proposed CRM fields, with review before records are committed.

Follow-up and campaign modules

Prepare approved email sequences, segmentation, landing-page content, and reporting when selected in scope.

Connected workflow and handoff

Configure the agreed integrations, duplicate checks, review queues, field mappings, and operating instructions.

— A focused starting scope

Start with one path such as meeting-to-CRM or account-research-to-outreach, a named CRM, approved source inputs, and a defined reviewer. The full module list is a menu; each proposal specifies what is included.

— Delivery

01

Select the handoff

Identify the task, record owner, required fields, and approved data sources.

02

Connect and stage

Build the chosen integrations and stage proposed records or messages for review.

03

Validate and release

Check duplicate handling, field accuracy, permissions, approval behavior, and recovery from a failed connection.

— What we need from you

CRM access approved by the system owner, field definitions, sample accounts, consented meeting records, campaign rules, approved messaging, and the appropriate third-party subscriptions.

— How we confirm it's ready

Representative inputs produce the agreed account brief, tasks, or staged CRM record. Duplicate and incomplete records remain visible. External messages and consequential record changes follow the approved review process.

— Scope boundaries

Integrations depend on the client's platform edition, permissions, and available APIs. Sending infrastructure, contact data, campaign volume, deliverability work, and ongoing campaign operation are separately defined. Pipeline or revenue results are not guaranteed.

— Investment and options

The number of selected workflows, connected tools, field mappings, account volumes, approval rules, and campaign assets determine the fee.

Add another workflow or department after the first handoff is accepted. Managed System Care covers agreed system upkeep; ongoing research or campaign operation requires an explicit operating scope.

Planning ranges in USD; scope and fees are confirmed in a written proposal. Assessment, implementation, and ongoing care are priced separately unless combined. Third-party software, model usage, hosting, data feeds, travel, and applicable taxes are additional unless included.

Start with a fit call

Bring the handoff your reps repeat after every call. I'll map the shortest useful path to a reviewed next action.

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