

Everything you need to know, before we start.

This guide exists so there's no back-and-forth before we start working together. Read the tier you're considering, check that it fits, and book when you're ready — no discovery call required.

How this works — every tier

The terms below apply no matter which service you book.

DEPOSIT & PAYMENT

A \$50 CAD deposit secures your booking and is applied to your final invoice. It's not refunded if you don't provide the requested access or information within 5 business days of booking. Balance is due at delivery for the Audit and Build tiers; the Partner retainer bills monthly in advance.

COMMUNICATION STYLE

Everything runs async by default — email and a short intake form, not a string of meetings. It's part of how I keep pricing low. A short optional call is available at the Build tier, and a monthly check-in call is built into the Partner retainer.

RESPONSE TIME

I reply within 1–2 business days. I need the same back from you — if an access or info request goes more than 5 business days without a reply, your timeline resets from when I hear back, not from your original booking date.

ACCESS & SCOPE

You'll be asked to share view or admin access to the specific tools in scope — never more than the engagement needs. Every project starts with a written scope; anything that comes up outside it becomes a quick follow-up quote, not free extra work.

The three tiers, at a glance

FSO-01 · AUDIT

from \$450 CAD, one-time. A focused, outside look at your CRM, workflows, and client touchpoints — where time and money are quietly leaking, and what to fix first. Most clients start here.

FSO-02 · BUILD

from \$1,500 CAD, 4–8 weeks. I build what the audit surfaced, so it's running — not just recommended. Delivered in phases, not one big reveal at the end.

FSO-03 · ONGOING PARTNER

from \$900 CAD/mo, retainer. I stay on part-time as the person who keeps what we built running, catches problems early, and improves it over time — without you having to make a full-time hire.

FSO-01 · AUDIT Systems Audit & Roadmap from \$450 CAD · one-time

A focused, outside look at your CRM, workflows, and client touchpoints — where time and money are quietly leaking, and what to fix first. This is the lowest-risk way to start.

- ✓ Review of your CRM & tech stack as currently used
- ✓ Mapping of bottlenecks and manual workarounds
- ✓ A written, prioritized roadmap — what to fix first and why
- ✓ One round of clarifying questions after delivery
- ✗ Building or implementing the fixes (that's the Build tier)
- ✗ Ongoing support after the roadmap is delivered
- ✗ Review of systems you don't grant access to

What I need from you: a completed intake questionnaire, view access to the systems in scope, one point of contact, and an honest answer to "what's actually broken" — not the polished version.

Timeline: delivered within 5–7 business days of receiving full access and your completed intake form.

FSO-02 · BUILD Build & Automate from \$1,500 CAD · 4–8 weeks

I build what the audit surfaced (or what we scope together at kickoff), so it's actually running — not just recommended. Delivered in phases.

- ✓ Implementation of the system(s)/automation(s) in scope
- ✓ AI-assisted support response setup, if included in scope
- ✓ Documentation your team can actually follow without me
- ✓ One delivered walkthrough (written, plus an optional short call)
- ✗ Ongoing monitoring or maintenance after handoff
- ✗ New feature requests beyond the locked scope
- ✗ Software/platform subscription costs (you own your own tools)

What I need from you: written sign-off on scope before work starts, admin-level access to the systems being built or connected, one decision-maker as point of contact, and timely feedback during testing.

Timeline: 4–8 weeks depending on scope — not full-time dedicated work, delivered in phases so you see progress along the way.

FSO-03 · ONGOING

Fractional Operations Partner from \$900 CAD/mo · retainer

I stay on part-time as the person who keeps what we built running, catches problems early, and improves it over time — without you having to make a full-time hire.

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| ✓ Ongoing CRM & project coordination (~15–20 hrs/month) | ✗ Unlimited hours (retainer scope is tracked and reported monthly) |
| ✓ Workflow optimization as your business changes | ✗ Same-day or emergency/24-7 response |
| ✓ Monthly written report + a review call | ✗ Work outside operations — bookkeeping, legal, marketing execution |
| ✓ Priority reply time for quick questions | |

What I need from you: ongoing access to the systems being managed, one standing monthly slot on the calendar, and one primary point of contact for decisions.

Terms: month-to-month, billed in advance, 30 days' notice to pause or end.

Common questions

Do you offer a free consultation call first?

No — the Audit is the paid first step, and it's priced low specifically so you don't need a free call to de-risk working together.

What if I'm not sure which tier I need?

Start with the Audit. It's built to tell us together whether Build or the ongoing Partner tier is the right next move — you're not locked into anything beyond it.

Is the deposit refundable?

It's applied to your invoice, not a separate fee. It's only forfeited if you don't provide the access or information needed to start within 5 business days of booking.

What happens if something comes up outside the agreed scope?

It becomes a short follow-up quote — logged and priced on the spot, never silently absorbed or silently ignored.

Sounds like a fit?

Most engagements start with the Audit. Book directly on the website, or email with what's going on.

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