

Agency Retainer Calculator Workflow Kit

Keyword: agency retainer calculator workflow kit

Visible value before checkout: filled example, before/after worksheet, dashboard preview, workbo

Use the scorecard, shortlist, pricing matrix, ROI calculator, RFP questions, and dashboard toget

Sample dashboard: review shortlist quality, risk flags, best ROI case, and missing evidence befo

Before/after: move from scattered notes to comparable vendor evidence and a written decision tra

Current pain: Harvest - Collect baseline cost, owner, and workflow friction before demos.

Budget-safe option: Bonsai - Prefer clear plan limits, lower setup work, and exportable data.

Best-fit option: PandaDoc - Prefer workflow depth, reporting quality, and role permissions.

Implementation-safe option: Productive - Prefer migration help, onboarding clarity, and low admi

Renewal-risk check: HubSpot Sales Hub - Review cancellation, price increase, data export, and su

Security check: Harvest - Confirm SSO, audit logs, permissions, backups, and user offboarding.

Reporting check: Bonsai - Ask for dashboard exports that prove value after 30, 60, and 90 days.

Integration check: PandaDoc - Verify native integrations, paid add-ons, and middleware dependenc

Stakeholder review: Productive - Record who approved cost, risk, data migration, and final vendo

Final decision: HubSpot Sales Hub - Document why the selected route won and which tradeoff was a

Post-purchase checkpoint: Harvest - Schedule adoption, usage, support, and renewal review dates.

Fallback route: Bonsai - Keep a lower-cost alternative if implementation risk becomes too high.

Client-ready note: PandaDoc - Summarize decision evidence for a client, partner, or finance revi

Risk exception: Productive - Name any unverified claim and require written vendor confirmation.

Operating record: HubSpot Sales Hub - Store the completed kit beside the contract or renewal fil

Conservative: monthly \$259.33 annual \$3112.0

Low budget: monthly \$155.17 annual \$1862.0

Agency operator: monthly \$986.0 annual \$11832.0

SMB operations: monthly \$531.0 annual \$6372.0

Expansion case: monthly \$1661.0 annual \$19932.0