A sample with a fictional product

Example CRM, its prices, pages and sources are invented. The questions, the kinds of finding and the recommendations follow patterns we see again and again when we review real vendors' public documentation, so this is the shape and depth your own report would have.

Buyer Readiness Report · Example CRM

Make the AI and contract answers as clear as the pricing.

Example CRM's pricing page is easy to read and its trial is simple. The gaps appear where careful buyers look next: plan features, AI data use and leaving the service. On those topics the pricing page, the help centre and the legal pages each give part of the answer, and in three places they disagree. S1 S3 S5 S10

Product	Buyer perspective	Market	Scope	Evidence captured
Example CRM	EU sales team of 8, HubSpot user	English site, EUR pricing	10 questions, 10 official pages	6 November 2026

Start with these three changes

1. Give HubSpot sync and AI credits one answer each, used on every page.
2. Say plainly which customer data the AI features may use, and how to opt out.
3. Publish what each plan can export and when data is deleted after cancellation.

Of the ten buyer questions: ✓ 3 clear · ! 5 need clarification · ✕ 2 conflicting

Keep what already helps

These answers are already clear. Keep them as they are while the other pages change.

Core prices are easy to compare

Each plan shows its price per user for monthly and yearly billing, with VAT stated and the Enterprise threshold named. S1

The trial needs no card

Fourteen days of the Growth plan, no card, and the pricing FAQ says what happens to the data when the trial ends. S2

The hosting region is a real choice

Customers pick an EU or US region at signup, and the DPA names the region and every subprocessor. S7

Our conclusion

None of these points needs a product change. They are documentation fixes that let a buyer confirm the answers without a sales call.

What a buyer can establish today

Ten buying questions selected for an EU sales team that already uses HubSpot. Each answer is what the reviewed pages support, with its sources.

Buyer question	Answer from the reviewed pages
1 **What does the first year cost?**	Clear Growth costs €20 per user a month billed monthly, or €16 billed yearly. VAT is extra. Our example below comes to €2,220 or €1,536 for eight users. S1
2 **Is there a minimum purchase?**	Needs clarification Every paid plan needs at least five users, but only the setup guide says so; the pricing page shows the price per user without the minimum. S1 S4
3 **Can we try it before paying?**	Clear A 14-day trial of Growth with no card. Data is kept for 30 days after the trial ends, then deleted. S2
4 **Which plan includes HubSpot sync?**	Conflicting answers The pricing table includes two-way HubSpot sync in Growth; the HubSpot integration page says it needs Enterprise. S1 S10
5 **What do extra AI credits cost?**	Conflicting answers Growth includes 1,000 AI credits a month and adds more automatically. The help centre prices extra credits at €15 per 1,000, the pricing FAQ at €10. S2 S3
6 **Can our customer data train AI models?**	Needs clarification The AI page says customer data is never used to train AI models. The privacy policy allows de-identified content to improve machine-learning features and names no opt-out. S5 S6

Buyer question	Answer from the reviewed pages
7 **Where is our data hosted?**	Clear In the region chosen at signup, EU or US. The DPA lists the region and each subprocessor with its country. S7
8 **What security assurance can we review?**	Needs clarification As vendor claims: the trust page shows a SOC 2 Type II badge, without saying which products the report covers or how to request it. Its link to the DPA returns an error. S8
9 **How do renewal and cancellation work?**	Needs clarification The pricing FAQ says "cancel anytime". The terms renew yearly plans automatically unless cancelled 30 days before the renewal date. S2 S6
10 **Can we take our data with us when we leave?**	Needs clarification Contacts export as CSV on every plan; email history and notes export only on Growth and above. The terms delete everything 30 days after cancellation, while the DPA offers return on request. S6 S7 S9

The labels describe how clearly the pages answer each question. They are not a score for the product, its security or the likelihood of a purchase.

What the first year costs

An EU sales team of eight chooses Growth for its HubSpot sync and AI assistant, and asks Example CRM to import its old contacts. The team stays at eight users and within its monthly AI credits. S1

Known component	Billed monthly	Billed yearly
Growth licences, 8 users	€20 × 8 × 12 €1,920	€16 × 8 × 12 €1,536
Data import service, once	€300 × 1 €300	Included yearly €0
First-year total before VAT	**€2,220**	**€1,536**

Yearly billing saves €684 in the first year under these assumptions, and it is paid in advance. S1

What this total leaves out

VAT and any extra AI credits, whose price the pages give two ways. If HubSpot sync turns out to need Enterprise, the cost changes completely, because Enterprise is quote-only. S1 S2 S3 S10

Four changes, in order

Each change shows what we saw, what it means for a buyer, what to change and how to check that it worked.

Priority 1 Conflicting answers

Give HubSpot sync one plan, everywhere

Pricing table S1

Growth: "Two-way HubSpot sync" ticked

Enterprise: "Two-way HubSpot sync" ticked

HubSpot integration page S10

"Two-way sync is available on the Enterprise plan"

Growth: "one-way contact import"

What this means for a buyer. HubSpot sync is the reason this team would choose Growth. If the integration page is right, the team needs an Enterprise quote, and the budget in this report no longer applies.

What to change

Decide which plan includes two-way sync, then update the pricing table, the integration page and the setup guide together. If Growth has a limited version, name the limit in the table.

Owner: product marketing with the integrations team.

Check the result

The pricing table and the integration page name the same plan for two-way HubSpot sync.

Priority 2 Needs clarification

Say what the AI features do with customer data

AI features page S5

"Your data is never used to train AI models"

Privacy policy, section 4 S6

"We may use de-identified content and usage data to improve our machine-learning features"

No opt-out described

What this means for a buyer. Data protection teams read both pages. The two statements may concern different data or different models, but a buyer has to guess, and an unresolved AI question often stops approval.

What to change

Add a short scope note beside the AI promise: which data the assistant reads, whether any of it improves models, whether that is on by default, and how an administrator opts out. Link it to the privacy policy and DPA.

Owner: privacy and legal with the AI product team.

Check the result

A buyer reading the AI page and the privacy policy can say which data may be used for which purpose, and how to switch it off.

Priority 3 | Conflicting answers

Publish one price for extra AI credits

What we saw. The pricing page says extra credits are "added automatically when you need them" without a price. The help article prices them at €15 per 1,000 credits; the pricing FAQ says €10. Neither says how much one assistant action uses. S1 S2 S3

What this means for a buyer. A team that uses the assistant heavily cannot estimate its monthly bill, and an automatic charge without a published rate is the kind of surprise that ends trials badly.

What to change

State one rate beside the Growth plan, give two or three examples of what 1,000 credits buy, and say whether automatic top-ups can be capped or switched off.

Owner: billing with product.

Check the result

A Growth buyer can work out the cost of a month in which the team uses 1,500 credits.

Priority 4 | Needs clarification

Tell leaving customers what they can take with them

What we saw. Contacts export as CSV on every plan; email history, notes and activity export only on Growth and above. The terms delete all data 30 days after cancellation. The DPA says data is returned on request. S6 S7 S9

What this means for a buyer. A Starter customer may discover at cancellation that its email history cannot be exported, and nobody can tell whether a return under the DPA would include it.

What to change

Add a short "Leaving Example CRM" article: what each plan exports, how to ask for a return under the DPA, when access ends and when data and backups are deleted. Align the terms with the DPA.

Owner: customer success with legal.

Check the result

A customer on any plan can read one page and plan an exit: what to export, by when, and what happens after.

Further improvements

Show the five-user minimum beside the price. It appears only in the setup guide, so a buyer reading the pricing page could expect to pay for fewer users. S1 S4

Match "cancel anytime" to the terms. Add the 30-day notice for yearly plans to the pricing FAQ, or link the terms from it. S2 S6

Scope the SOC 2 badge. Say which products the report covers and how a prospective customer can request it. S8

Fix the DPA link on the trust page. It returns an error; the DPA itself is available from the legal pages. S7 S8

Update the retired plan name. The AI credits help article still says credits come with the "Pro" plan, which the pricing page no longer lists. S3

Fix the answers buyers check, then check them side by side

A suggested order. The first two need a product decision; the rest are editorial.

1. **Decide the HubSpot sync plan**
   Then update the pricing table, integration page and setup guide together.
2. **Agree the AI data statement**
   With privacy and legal, and link it from the AI page.
3. **Publish one credit price and the exit guide**
   Both need a short billing and legal check.
4. **Make the editorial fixes**
   Minimum, cancellation wording, SOC 2 scope, DPA link and the retired plan name.

Questions the public pages could not settle

- Does Growth include a limited form of HubSpot sync that the pages describe differently?
- Which data, if any, improves the machine-learning features today?
- Would a return under the DPA include email history for Starter customers?

In a real report, your answers would let us make the recommendations more precise.

Included with your report

One round of follow-up. Send your questions or corrections together within 14 days after delivery.

One recheck. Send up to three updated pages within 30 days after delivery and we will check them against these findings.

We reply within five business days. Write to alex@emerging.cz.

Sources and scope

Ten official Example CRM pages, captured on 6 November 2026. Pages may have changed since.

S1	**Pricing.** Plan cards, monthly and yearly states, comparison table. example.com/pricing
S2	**Pricing FAQ.** Trial, cancellation and AI credit answers. example.com/pricing#faq
S3	**Help centre: AI credits.** Included credits and the price of extra credits. example.com/help/ai-credits
S4	**Help centre: Setting up your workspace.** Minimum users per paid plan. example.com/help/setup
S5	**AI features.** AI assistant overview and data statement. example.com/ai
S6	**Privacy policy and terms of service.** Section 4 of the privacy policy; renewal, cancellation and deletion clauses of the terms. example.com/legal
S7	**Data processing agreement.** Hosting region, subprocessors, return and deletion. example.com/legal/dpa
S8	**Trust page.** Security overview and SOC 2 badge. example.com/trust

S9	**Help centre: Exporting your data.** Export options by plan. example.com/help/export
S10	**HubSpot integration.** Sync directions and plan requirement. example.com/integrations/hubspot

How this report was prepared

In a real report: AI analysis of the vendor's public pages read in a desktop browser, with every pricing state opened and the legal documents read in full. Calculations are rechecked in code. No independent human expert review is claimed.

What it does not cover

We do not log in, buy, test the product, read customer-specific contracts or verify certificates. Findings concern what buyers can establish from public pages, not legal compliance or product performance.

A sample. Example CRM, its prices, pages and sources are invented; no real vendor is described.