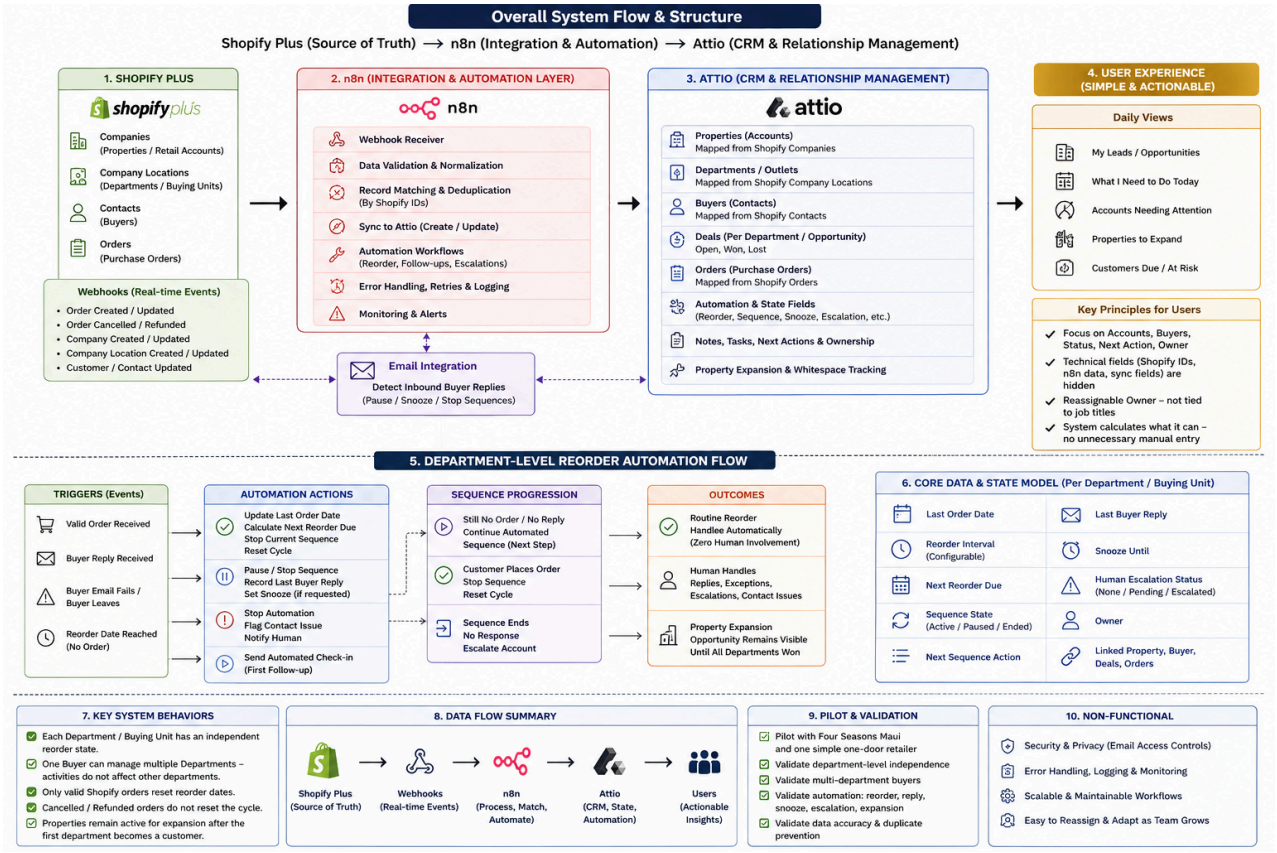
22/08/2026

Implementation Plan

Attio CRM Architecture & Shopify Plus Integration

1. Current Scope

- Attio CRM architecture aligned with Shopify Plus B2B structure
- Configure Properties, Departments/Outlets, Buyers, Deals, Orders, and relationships
- Shopify Plus API, webhook, and n8n integration
- Shopify Companies, Locations, Buyers, and Orders synchronization
- Existing data backfill and Shopify ID-based matching
- Duplicate prevention and prospect-to-customer matching
- Independent department-level reorder tracking and automation
- Automated check-ins, follow-ups, snooze, pause, reset, and escalation workflows
- Inbound buyer reply and email-failure handling
- Buyer-to-multiple-department relationship management
- Property expansion and unpenetrated department opportunity tracking
- Simple CRM views for daily tasks, opportunities, customers, and human attention
- Cancelled/refunded order handling
- n8n logging, retry logic, monitoring, and error handling
- Pilot testing with Four Seasons Maui and a one-door retailer
- End-to-end testing, documentation, and handover



2. Implementation plan

1. CRM Architecture & Attio Setup

- Configure the Attio workspace and core CRM structure.
- Set up Properties, Departments/Outlets, Buyers, Deals, and Orders.
- Create required fields, relationships, and ownership structure.
- Keep technical Shopify/n8n fields hidden from normal users.

2. Shopify Plus & n8n Integration

- Configure Shopify Admin API access and required webhooks.
- Connect Shopify and Attio credentials with n8n.
- Build the core Shopify → n8n → Attio integration.
- Add logging, retry logic, and error handling.

3. Shopify Data Synchronization

- Sync Shopify Companies and Company Locations with Attio.
- Map Company → Property and Company Location → Department/Outlet.
- Sync Buyers and relevant Shopify order information.
- Use Shopify IDs for permanent record matching.
- Prevent duplicate records.

4. Data Backfill & Migration

- Backfill existing Companies, Locations, Buyers, and relevant order history.
- Match existing Shopify records with Attio records.
- Validate data before enabling automation.

5. Department-Level Reorder Automation

- Create independent reorder state for each Department/Outlet.
- Configure Last Order Date, Reorder Interval, and Next Reorder Due.
- Add Sequence State, Next Sequence Action, Snooze, and Escalation status.
- Ensure one department's activity does not affect another department.

6. Automated Customer Check-ins

- Identify departments reaching their reorder date.
- Trigger automated check-in sequences.
- Stop/reset the sequence when a valid order is received.
- Continue automated follow-ups when there is no response.
- Escalate accounts when the sequence ends without a response.

7. Inbound Reply & Exception Handling

- Detect buyer replies and relevant inbound communication.
- Pause or stop the correct department's sequence.
- Support snooze requests such as “check back in October.”
- Flag failed buyer emails or contact issues for human attention.

8. Property Expansion Workflow

- Keep the Property opportunity active after the first department becomes a customer.
- Track remaining unpenetrated departments.
- Create visibility for departments that exist in Attio before Shopify.
- Support expansion opportunities across the property.

9. Buyer & Deal Management

- Allow one Buyer to manage multiple Departments/Outlets.
- Maintain separate department-level sales and reorder context.
- Manage Deals at the appropriate Property/Department level.
- Prevent workflow conflicts between departments sharing the same Buyer.

10. CRM Views & User Experience

- Create simple daily views for:
    - My Leads / Opportunities
    - What I Need to Do Today
    - Accounts Needing Attention
    - Properties to Expand
    - Customers Due / At Risk
- Use a simple, reassignable Owner field.

11. Pilot Implementation & Testing

- Pilot the system with **Four Seasons Maui** and one simple one-door retailer.

- Validate department-level reorder independence.
- Test first-order matching without duplicates.
- Test multi-department Buyer scenarios.
- Validate automated reorder cycles, replies, escalations, and property expansion.

12. Final QA, Documentation & Handover

- Test Shopify webhooks, synchronization, matching, and automation.
- Test cancelled/refunded order handling.
- Validate n8n error recovery and monitoring.
- Document workflows, field mappings, and system configuration.
- Provide final handover and usage guidance.

Platform Recommendation

Platform	Recommended Plan	Initial Cost (4 Users)	Recommendation
Attio	**Plus**	**$140/month**	**Recommended** – Core CRM for managing Companies, Properties, Outlets, Buyers, Deals, Orders, and customer relationships.
n8n	**Self-hosted**	**25$/month**	**Recommended –** Integration and automation layer connecting Shopify Plus with Attio, handling webhooks, data synchronization, matching logic, and reorder workflows.

Estimation Table

#	Phase	Price
1	Phase 1 — CRM Architecture & Data Model	$318
2	Phase 2 — Shopify Plus Integration & Data Synchronization	$318
3	Phase 3 — Reorder & Customer Follow-up Automation	$318
4	Phase 4 — Testing, Validation & Optimization	$318
Total	**Complete Implementation**	**$1,272**