Project proposal

CRM implementation for Lakeside Industrial Supply: one system for 60 sales reps, live in 14 weeks.

PROPOSAL # NB-PP-26-044
ISSUED Sep 21, 2026
VALID UNTIL Oct 23, 2026



CREATED BY

Northbound Digital Inc.
Priya Desai
+1 416 555 0175
priya.desai@northbound.example
HST: 81742 5519 RT0001

PREPARED FOR

Lakeside Industrial Supply Ltd.
Martin Osei
+1 905 555 0136
m.osei@lakesideindustrial.example

Background and objectives

Where you are today

Customer data lives in the ERP, three spreadsheets and each rep's inbox. Managers build the weekly forecast by hand, and quotes take a day to turn around.

What the project will achieve

One CRM for sales and service, connected to the ERP, with quoting from the deal and a live forecast, adopted by all 60 reps.

How we will measure success

Weekly active use by 90% of reps by week 18, quotes sent within 4 hours, and a forecast that no longer needs a spreadsheet.

Outcomes

One customer view

Orders, quotes and contacts together

Faster quotes

From a day to a few hours

A real forecast

Live, by rep and region

The project at a glance

Based on the discovery call and the system list your IT team shared.

14

Weeks

From kickoff to go-live

60

Users

Reps, managers, service

180k

Records

Migrated and deduplicated

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Scope

What the fixed fees cover, and what they do not.

Included

- Sales pipelines, quoting and forecasting
- Service cases for the inside sales team
- Migration of accounts, contacts, deals and order history
- Two-way ERP integration for customers, products and orders
- Email and calendar sync for all users
- Training, hypercare and documentation

Not included

- CRM licenses, bought by you directly from the vendor
- Changes inside the ERP itself
- Marketing automation, which can be a second phase
- Data older than five years

Anything outside this scope is estimated and agreed in writing before work starts.

Risks and how we manage them

RISK	IMPACT	WHAT WE DO
Duplicate and incomplete customer data	High	Cleanse in phase 3 with your sales ops lead signing off
Reps keep using spreadsheets	High	Managers run pipeline reviews only from the CRM after go-live
ERP changes during the project	Medium	Integration frozen after week 8; changes go to a later release
Key people unavailable	Medium	Named deputies for each workshop and sign-off

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Plan and deliverables

Five phases over 14 weeks, with a steering meeting at the end of each.

WEEKS 1–3

Discovery and design

Tasks

- Process workshops by team
- Data audit

Deliverables

- Signed solution design

WEEKS 4–9

Build

Tasks

- Configuration in three sprints
- Demo at the end of each sprint

Deliverables

- Configured CRM in test

WEEKS 6–10

Migration and integrations

Tasks

- Two trial migrations
- ERP and email integration

Deliverables

- Reconciled data
- Integration test report

WEEKS 11–12

Testing and training

Tasks

- User acceptance testing
- Six training sessions

Deliverables

- Signed UAT
- Training recordings

WEEKS 13–14

Go-live and hypercare

Tasks

- Final migration over a weekend
- Daily support for four weeks

Deliverables

- Live system
- Handover pack

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Budget

Fixed fees by phase, in Canadian dollars. HST applies to all professional services.

#	ITEM	QTY	PRICE	DISC.	TAX	TOTAL
	Design and build					
1	**Discovery and solution design** Code: PH1 Workshops with sales, service and finance; the process map and the signed-off design.	1 phase	$18,500.00	–	13%	$20,905.00
2	**CRM configuration and build** Code: PH2 Pipelines, quoting, permissions, dashboards and automations, built in two-week sprints. 	1 phase	$42,000.00	–	13%	$47,460.00
3	**Data migration, about 180,000 records** Code: PH3 Accounts, contacts, open deals and five years of order history, cleaned and deduplicated.	1 phase	$16,800.00	–	13%	$18,984.00
4	**Integrations: ERP and email** Code: PH4	2 integrations	$9,500.00	–	13%	$21,470.00
					Subtotal: Design and build	**$108,819.00**
	Adoption and management					
5	**Training sessions, role-based** Code: PH5 Sales reps, inside sales, managers and admins; recorded for new hires.	6 sessions	$1,400.00	–	13%	$9,492.00
6	**Hypercare after go-live** Code: PH6 Daily check-ins, fixes and adjustments while the team settles in.	4 weeks	$2,250.00	–	13%	$10,170.00
7	**Project management** Code: PM Plan, weekly status reports, risk log and the steering meetings.	14 weeks	$1,600.00	–	13%	$25,312.00
					Subtotal: Adoption and management	**$44,974.00**

Subtotal	$136,100.00
HST 13% (Ontario)	$17,693.00
Total	**$153,793.00**

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Payment milestones

Invoiced as each milestone is signed off, payable in 30 days.

PAYMENT 1, 27%

$41,640.50

Design signed off

End of week 3

PAYMENT 2, 47%

$72,399.10

Build accepted

End of week 12

PAYMENT 3, 26%

$39,753.40

Go-live and hypercare

End of week 18

Total **$153,793.00**

Project team



Priya Desai

Engagement lead

Chairs the steering meetings; owns scope and budget.



Tom Leclerc

Solution architect

Designs the CRM and the ERP integration.



Grace Lam

Data specialist

Runs the cleanse and both trial migrations.

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Terms

1. Governance

1.1 A steering group of two people from each side meets at the end of every phase and approves any change.

2. Change requests

2.1 Changes to scope are estimated in writing and need steering group approval before work starts.

3. Your responsibilities

3.1 A project owner for 1 day a week, timely sign-offs and access to the ERP test environment.

4. Acceptance

4.1 Each milestone is accepted when signed, or 10 working days after delivery without written issues.

5. Data

5.1 Your data is processed in Canada and deleted from our systems 30 days after hypercare ends.

6. Validity

6.1 This proposal is valid until Oct 23, 2026.

Approval

Signed for Lakeside Industrial Supply Ltd. and Northbound Digital Inc. The project starts on the first Monday after signature.

FOR LAKESIDE

_____

SIGNATURE

Lakeside Industrial Supply Ltd.

Name: _____

Date: ____ / ____ / _____

FOR NORTHBOUND

_____

SIGNATURE

Northbound Digital Inc.

Name: _____

Date: ____ / ____ / _____

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