Statement of Work (SoW)

CRM System Implementation Project

Prepared for:
Innovatech Solutions, Inc.
225 Technology Drive, San Jose, CA 95110

Prepared by:
AlphaTech Consulting, LLC.
900 Market Street, San Francisco, CA 94102

Date: April 4, 2025
Project Duration: May 1, 2025 – September 30, 2025

1. Project Overview

AlphaTech Consulting will implement Salesforce CRM at Innovatech Solutions, transitioning from the existing legacy CRM, SugarCRM. The goal is to streamline customer relationship management, increase sales productivity by 20%, and enhance reporting capabilities.

2. Scope of Work

2.1 CRM Implementation
- Installation and configuration of Salesforce Sales Cloud.
- Migration of approximately 20,000 customer records and historical data (5 years) from SugarCRM.
- Integration with existing ERP system (SAP S/4HANA) and email platform (Microsoft Outlook).
- Deployment of standard Salesforce dashboards and customized reporting modules.

2.2 Custom Development
- Custom Salesforce Lightning components (up to 5 components).
- Workflow automation (up to 10 automation workflows).
- API integrations with SAP S/4HANA for inventory and order management.

2.3 User Training & Documentation
- Comprehensive training for 150 users across sales, marketing, and customer service teams.
- Delivery of detailed user manuals, training guides, and quick reference sheets.
- Provision of online training sessions (up to 10 sessions).

2.4 Post-Implementation Support
- Ongoing support and maintenance for three months post-go-live.

- Weekly health-check meetings.
- 24-hour turnaround for critical support issues.

3. Deliverables
- Salesforce Sales Cloud fully implemented and operational.
- Migrated data verified and validated by the Innovatech Solutions team.
- Integrated system with SAP S/4HANA and Microsoft Outlook.
- Complete set of custom-built components and workflows deployed.
- User manuals, training documentation, and recorded sessions provided.
- Detailed project closure report.

4. Project Timeline
- Project Kick-off: May 1, 2025
- Requirements Gathering & Planning: May 2 – May 16, 2025
- System Installation & Configuration: May 19 – June 13, 2025
- Data Migration & Integration: June 16 – July 25, 2025
- Custom Development & Testing: July 28 – August 22, 2025
- User Training: August 25 – September 12, 2025
- Go-Live: September 15, 2025
- Support & Project Closure: September 16 – September 30, 2025

5. Project Costs
Salesforce Licensing (150 users, annual): $180,000
Implementation Services: $95,000
Custom Development: $40,000
Training & Documentation: $15,000
Post-Implementation Support: $10,000
Total: $340,000

6. Acceptance Criteria
- All system functionalities fully operational with zero critical issues.
- Data migration verified with less than 1% error rate.
- Successful completion of training and documented user competency.
- Sign-off from Innovatech Solutions management upon successful project delivery.

7. Assumptions
- Innovatech Solutions will provide timely access to existing CRM and ERP systems.
- Availability of key stakeholders for meetings, data verification, and training.
- Salesforce licensing cost subject to changes in Salesforce pricing.

8. Risks and Mitigation
- Risk: Data loss or corruption during migration.
  Mitigation: Backup procedures and phased migration approach.

- Risk: Integration challenges with SAP.
  Mitigation: Early involvement of SAP specialists and robust API testing.

9. Project Team
- Project Sponsor: Jennifer Bell, VP Sales, Innovatech Solutions
- Project Manager: Rajiv Kumar, AlphaTech Consulting
- Technical Lead: Maria Gomez, AlphaTech Consulting
- Lead Salesforce Consultant: Kevin Liu, AlphaTech Consulting

Approval Signatures:

_____

Jennifer Bell, VP Sales
Innovatech Solutions, Inc.
Date:

_____

Anita Reynolds, Director of Projects
AlphaTech Consulting, LLC.
Date: