# **Statement of Work (SOW)**

**Project Title:** CRM Transformation Program  
 **Client:** Horizon Travel Group (HTG)  
 **Consulting Partner:** CloudEdge Consulting  
 **Date:** February 2025  
 **Version:** 1.0

### **1. Introduction**

Horizon Travel Group (HTG) is one of the leading travel and logistics providers operating across North America and Europe. With multiple service lines—corporate housing, ground transportation, and premium travel concierge—HTG aims to unify customer experiences through a centralized Salesforce CRM platform.

The implementation will support customer lifecycle management, automate manual processes, and provide data-driven insights to improve client service quality and operational visibility.

This engagement covers the end-to-end deployment of Salesforce Sales Cloud with selected Service Cloud features and basic integrations to financial, communication, and document systems.

### **2. Project Objectives**

* Implement Salesforce CRM to manage all client relationships and service workflows.
* Integrate key third-party platforms like QuickBooks, DocuSign, and WhatsApp Business for seamless operations.
* Enable digital approval flows, automated notifications, and visibility dashboards.
* Create a foundation for future expansion to Travel Booking, Dispatch, and Vehicle Sourcing modules.

### **3. Scope of Work**

#### **3.1 In Scope**

* Configuration of Salesforce Sales Cloud and basic Service Cloud capabilities.
* Migration of customer and service data from Excel-based records.
* User profile setup and role-based permissions for the internal team.
* Integration with:  
  + **Email (Outlook)** for logging client communications.
  + **QuickBooks Online** for client records and service estimate synchronization.
  + **DocuSign** for electronic signatures.
  + **WhatsApp Business API** for two-way communication and logging.
* Workflow automation for:  
  + Corporate housing requests
  + Transportation service coordination
  + Travel quotation and approval process
* Partner portal setup for corporate clients.
* Template creation for service agreements and client communications.

#### **3.2 Out of Scope**

* Travel booking engine integrations.
* Custom dashboards or reports (only standard Salesforce dashboards).
* Shipping, moving, or dispatch-related modules.
* Complex QuickBooks integrations beyond client record creation.
* Post-implementation managed services or AMC (handled under a separate support contract).

### **4. Business Units and Stakeholders**

The project involves collaboration across three main business units. Each BU has a set of primary stakeholders and supporting team members.

#### **4.1 Corporate Housing**

| **Name** | **Role** | **Email** |
| --- | --- | --- |
| Priya Menon | General Manager – Corporate Housing | priya.menon@horizongroup.com |
| Rajesh Verma | Operations Supervisor | rajesh.verma@horizongroup.com |

#### **4.2 Transportation**

| **Name** | **Role** | **Email** |
| --- | --- | --- |
| Angela Brooks | Head of Transportation | angela.brooks@horizongroup.com |
| Thomas Wu | Fleet Coordinator | thomas.wu@horizongroup.com |

#### **4.3 Travel Concierge**

| **Name** | **Role** | **Email** |
| --- | --- | --- |
| Nicole Rivera | Senior Travel Consultant | nicole.rivera@horizongroup.com |
| David Lee | CRM Champion | david.lee@horizongroup.com |

#### **Project Sponsor**

* **Name:** Martin Keller
* **Designation:** Chief Operating Officer
* **Email:** martin.keller@horizongroup.com

#### **Project Manager (Client)**

* **Name:** Karan Gadani
* **Designation:** PMO Lead
* **Email:** karan.gadani@horizongroup.com

#### **Delivery Lead (Consulting Partner)**

* **Name:** Dhruv Mehta
* **Designation:** Salesforce Delivery Manager
* **Email:** dhruv.mehta@cloudedge.io

### **5. Modules and Processes**

| **Module** | **Key Processes** | **Notes** |
| --- | --- | --- |
| **Client Relationship Management** | Lead capture, opportunity tracking, and account management | To replace Excel-based tracking with automated pipeline management |
| **Corporate Housing Automation** | Estimate creation, agreement management, occupancy tracking | Integrated with QuickBooks and DocuSign |
| **Transportation Scheduling** | Trip requests, vehicle allocation, vendor coordination | Alerts for idle requests beyond 24/48/72 hrs |
| **Travel Coordination** | Quotation workflow, itinerary approval, client notification | Future expansion for travel booking |
| **Partner Portal** | Corporate client dashboard, document uploads, request monitoring | Based on Salesforce Experience Cloud |

### **6. Salesforce License Inventory**

| **License Type** | **Quantity** | **Assigned Users** | **Notes** |
| --- | --- | --- | --- |
| Sales Cloud Enterprise | 10 | Sales, Ops, Managers | For all core users |
| Platform Starter | 5 | Partner users | For corporate client portal |
| Service Cloud | 3 | Support team | For request management and client servicing |
| DocuSign Connector License | 1 | Admin user | Integration license |
| WhatsApp Messaging Connector | 1 | Integration use case | Via third-party app |

### **7. Timeline and Milestones**

* **Week 1:** Kickoff & Requirement Workshops
* **Week 2–3:** Configuration and Integrations (Outlook, QuickBooks, DocuSign)
* **Week 4:** Workflow Automation and Portal Setup
* **Week 5:** UAT & Training
* **Week 6:** Go-Live and Transition

### **8. Assumptions**

* HTG will provide access to necessary systems and credentials (QuickBooks, Outlook, DocuSign, WhatsApp).
* Data provided by HTG will be clean and validated for import.
* Any change in business scope post-handover will be treated as a change request.
* Out-of-the-box Google address lookup will suffice—no custom integration required.
* Timely feedback and approvals are expected to maintain project timelines.

### **9. Acceptance Criteria**

The engagement will be deemed complete when:

* The Salesforce system is configured and live with migrated data.
* All planned integrations are tested and functional.
* Workflows and automations are validated by business users.
* All identified users are trained and onboarded.
* Formal sign-off is received from the client sponsor.

### **10. Authorization**

**Client:** Horizon Travel Group  
 (Signature) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Date: ***/***/2025

**Consulting Partner:** CloudEdge Consulting  
 (Signature) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Date: ***/***/2025