

Statement of Work

GRAINGER PLC
RENEWALS - SALESFORCE CONSULTING

Version 1.1
June 21, 2024

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1 STATEMENT OF WORK

1.1 INTRODUCTION

Grainger PLC is the UK's largest listed residential landlord, a company whose value is based on their rental income. Optimal rental income requires a delicate balance between customer retention and rent increases. Renewals of existing tenancies are a large part of Grainger PLC's business and provide an excellent opportunity to assess the value of a tenant (both current and future) and make an informed decision on whether to pursue a renewal and at what rental price.

The renewals process is currently managed by the Grainger PLC Renewals Team and is shoehorned into the Salesforce leasing journey which is designed primarily for new leases. Some of the key inputs for this process are held out of system (e.g. unit pricing in spreadsheets) or in other systems not integrated to Salesforce (e.g. complaints/issues managed in MRI Evolution), reducing Grainger PLC's ability to effectively use these data points during the renewal journey.

Grainger PLC are now looking to design a Salesforce-based future state renewals journey that leverages the single view of the customer to streamline the process, reduce the level of manual effort and create a standardised, simplified and transparent process. Ultimately this will allow more strategic rental uplifts based on the value of the customer, better tenant retention and will enable Grainger PLC to scale their portfolio without a corresponding linear increase in headcount.

1.2 SERVICES OVERVIEW

Open Box will provide the assistance of a Salesforce Technical Architect and Senior Business Analyst to design the future state of the Renewals process that aligns with Salesforce features and best practices.

The Open Box consultants will work closely with the Grainger PLC project sponsor (Jon Pitt) to ensure alignment of priorities and outputs to produce the desired documentation and artefacts.

1.3 PROJECT OBJECTIVES

1. Open Box will work with the Grainger PLC team to engage stakeholders to map out the current, as-is state of the Renewals process and deliver an as-is process diagram.
2. Open Box will work with the Grainger PLC team to engage stakeholders in future state design sessions. Open Box will use their Salesforce and Business Analysis

- expertise to shape a future-state design for the Renewals process that aligns with Salesforce features, best practices and minimises technical debt.
3. If necessary, Open Box will develop a proof-of-concept that demonstrates aspects of the proposed solution.
 4. Open Box will deliver a solution proposal (document or presentation) that includes:
 - a. Recommended project phasing, if more than one release is required.
 - b. A future state Renewals process diagram (for the initial solution release).
 5. Open Box will deliver a High-Level Design (HLD) for a Salesforce solution that addresses:
 - a. Details of any additional Salesforce licensing required
 - b. Proposed, high-level data model
 - c. Integration points
 - d. Recommended approach to:
 - i. Data sharing and visibility
 - ii. Document/file management
 - iii. Reporting
 - iv. Data migration
 - e. Providing the Renewals Team with a single view of the customer to support the renewals process from beginning to end
 6. Open Box will create a feature backlog in Jira that captures the outcomes to be delivered. It is envisaged that this backlog will be used during an iterative delivery phase to identify, develop and deploy the most valuable features for each release.
 - a. The features identified for release 1 will be sized and prioritized relative to each other.
 - b. Note that any features identified for possible future releases will be added to the backlog; but this project will not deliver a full backlog of all features required for future releases.
 - c. Note this initial engagement will not provide detailed user stories; these will be addressed in a subsequent project phase that includes sprint zero and solution delivery.

7. Open Box will provide an initial forecast of the number of sprints, cost & timeline required to deliver the project backlog for release 1.

1.4 RESPONSIBILITIES

1. Open Box will be responsible for:
 - a. Providing the services and deliverables described in the [Project Objectives](#).
 - b. Delivering a progress report to Grainger on a regular basis that will include:
 - i. Progress, milestones, and any outstanding deliverables.
 - ii. Hours utilized to date.
 - iii. Forecast of remaining hours that are likely to be required by Open Box.
2. Grainger will be responsible for:
 - a. Making key personnel and stakeholders available to Open Box.
 - b. Making a Grainger project sponsor available to facilitate decision-making.
 - c. Delivering any information required in a timely manner.

1.5 AVAILABILITY

1. Open Box resources will be contactable and available for meetings via conference calls/video conferences:
 - a. Monday to Friday 9am – 6pm South African time which corresponds to 7am – 4pm GMT, excluding public holidays.
2. All work will be completed by Open Box offsite.

1.6 REFERENCES

- Grainger, Open Box meeting: Renewals Journey (Thursday, 28 March 2024)
- Grainger, Open Box meeting: Renewals Journey (Thursday, 16 May 2024)
- Grainger plc – Renewals – Rough Order of Magnitude.pdf (24/04/2024)

2 COSTS AND RESOURCING

The cost for the services detailed in this document are as follows:

1. An Open Box Senior Business Analyst and Salesforce Technical Architect will be available on a Time & Materials (T&M) basis of £120 per hour. This is a reduced rate from the standard consultancy rate of £150 per hour due to the size and nature of this project.
2. The effort to deliver the project objectives is anticipated to be 250 - 350 hours.
3. The cost is estimated to be in the following range:

Range	Hours	Cost
Lower Bound	250	£30,000
Upper Bound	350	£42,000

4. The consultancy will be provided remotely.
5. Cost will be reported to Grainger on a weekly basis during the project.
6. Costs exclude travel or onsite analysis.
7. All amounts are in GBP (£) and excludes any VAT or sales taxes, if applicable.
8. Costs will be billed monthly, in arrears.
9. This quotation is valid for 30 days and is assumed to start on 24th June 2024 or during the following 1-2 weeks, contingent on operational factors.

3 ACCEPTANCE

The parties hereto, each acting under due and proper authority, have executed this Agreement as of the day, month and year first written below.

For and on behalf of Open Box Software For and on behalf of Grainger plc

Signature:	<u><i>Sam Duncan</i></u> Sam Duncan (Jun 22, 2024 08:23 GMT+2)	Signature:	<u><i>Jon Pitt</i></u> Jon Pitt (Jun 21, 2024 16:17 GMT+1)
Name:	Sam Duncan	Name:	Jon Pitt
Position:	Salesforce Director	Position:	Director
Date:	06/22/24	Date:	06/21/24