

# Statement of Work

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**GRAINGER PLC**  
COMMERCIAL LEAD TO LEASE

*Version 1.0*  
*July 12, 2024*

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## 1 STATEMENT OF WORK

### 1.1 INTRODUCTION

Grainger PLC has successfully implemented the Lead-to-Lease process in Salesforce for residential leases, however the commercial leasing process remains offline. There are approximately 170 commercial units, and 30 new units are expected to be added next year.

The process is currently managed in spreadsheets and reporting, which takes place out of Qube, does not include units under offer. Commercial tenants are only entered into Salesforce after the leasing journey and, as a result, the deposit payment process differs between residential and commercial leases causing confusing and inefficiencies.

The proposed solution would provide a Lead-to-Lease process for commercial leases within Salesforce that would reduce manual data capture, standardize the deposit payment process, and improve reporting and visibility into commercial leasing activity.

This project would additionally contribute towards the broader Grainger PLC initiative to create a single view of customer.

### 1.2 SOLUTION OVERVIEW

The proposed solution would contain the following key features:

1. A customized lead-to-lease process for commercial leases within Salesforce, that is separate to the existing residential lead-to-lease process.
  - a. The process will create Lead, Opportunity, Account and Tenancy records for commercial leases in Salesforce, and may take place while buildings and units are still in development.
  - b. The process may include the following steps:
    - i. Agent proposes a new tenant
    - ii. Initial offer discussion
    - iii. Agent drafts heads of terms
    - iv. Heads of terms negotiation
    - v. Asset management sign off
    - vi. Investment committee sign off
    - vii. Distribute heads of terms to all parties

- viii. Lawyers draft lease
  - ix. Lease document negotiation/updates
  - x. Screening
  - xi. Deposit payment
  - xii. Lease signing
- 2. An approval process within Salesforce that manages Asset Management and Investment Committee sign off on the offer, provides notifications to users, and maintains a history of approvals and rejections.
- 3. A commercial lease deposit payment process within Salesforce that is aligned with the existing residential deposit payment process.
- 4. A summary of each key lease term that may be captured and updated as negotiations progress, as well as a history of each previous version of the lease term summary (which will be saved using standard Salesforce field history tracking).
- 5. A new commercial leasing dashboard and reports in Salesforce that provides visibility into:
  - a. The commercial leasing pipeline.
  - b. The commercial leasing team's activity.
  - c. Turnaround times for each stage in the process.

### 1.3 OBJECTIVES

The objectives of this project are to:

- 1. Assess the key solution requirements (for release 1), in consultation with Grainger PLC.
- 2. Design a solution and data model that aligns with the current Grainger PLC org, Salesforce features, best practices and minimises technical debt.
- 3. If necessary, develop a proof-of-concept that demonstrates aspects of the proposed solution.
- 4. Compile a project backlog that contains the outcomes to be delivered in release 1. The backlog will be used during an iterative delivery phase to identify, develop and deploy the most valuable features.

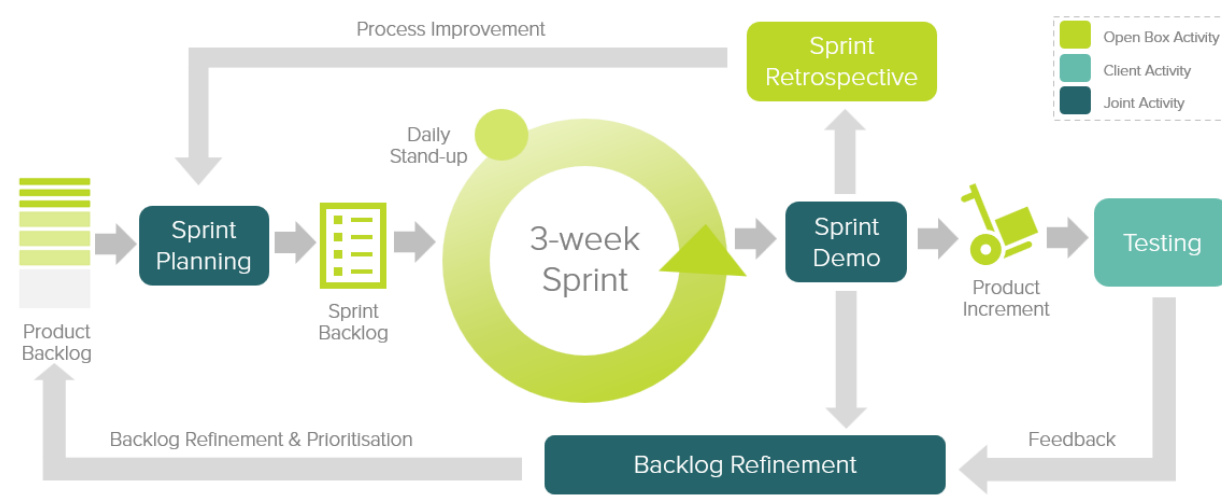
- a. Prioritize the features on the backlog (in collaboration with Grainger PLC).
  - b. Write user stories with detailed acceptance criteria that will be reviewed and agreed with Grainger PLC.
5. Provide a revised forecast of the number of sprints, cost & timeline required to deliver the project backlog.
  - a. Note that costs and timelines are forecasts that will be continuously refined throughout the project, based on continuous feedback, backlog refinement and re-prioritization.
6. Deliver a solution containing the features listed in the [Solution Overview](#).
7. Provide a single user guide addressing the new front-end functionality delivered.

#### 1.4 DELIVERY APPROACH

The delivery approach will be based on the SCRUM framework. Iterative delivery is achieved through a series of 3-week sprints.

An agile delivery approach allows for the early delivery of outcomes and provides flexibility to adjust for any unforeseen opportunities or issues uncovered during the project.

A backlog will be maintained to track outcomes to be delivered and indicate priority of these outcomes relative to each other. The backlog will be a living artifact that will evolve as Open Box and Grainger PLC collaborate towards maximizing the value delivered. Grainger PLC stakeholders will have access to the backlog which will serve as the single source of truth with regards to scope.



**Figure 1: Agile Delivery Approach**

Grainger PLC representatives will be required to participate in the following during each sprint cycle:

- **Backlog Refinement** – Open Box and Grainger PLC representatives will meet to prioritize user stories on the backlog as well as review and agree on acceptance criteria for user stories at the top of the backlog.
- **Sprint Planning** – Outcomes on the backlog will be selected for the next sprint.
- **Demo** – Open Box will meet with Grainger PLC representatives to demonstrate the outcomes delivered in the past sprint.
- **Testing** – Open Box will be responsible for unit testing and QA testing of all functionality. Grainger PLC representatives will conduct user acceptance testing (UAT) of new functionality delivered in each sprint and provide feedback within 1 week of the demo.
- **Stand Up** – Regular, 15-minute stand-up calls will be held to report on progress; a Grainger PLC representative is expected to participate in this call to provide feedback and give input on any questions that arise.

Feedback from demos and testing will be classified as either bugs or enhancements (depending on the user story and acceptance criteria). Bugs will be fixed in a subsequent sprint, whereas enhancements will be incorporated into the backlog and prioritized accordingly.

If it is expected that the critical functionality can no longer be delivered within the estimated [cost and timeline](#), this will be communicated to Grainger PLC. Grainger PLC may choose to resolve this by adjusting the project scope and/or cost & timelines accordingly.

#### 1.4.1 UAT

Designated Grainger PLC business users will be given access to a UAT environment to test the functionality end-to-end and ensure that the overall solution is functioning as expected.

Issues raised will be classified as bugs or enhancements (as above). Bugs will be fixed during the UAT period. Any other enhancements or new requirements will be added to the product backlog for future development.

#### 1.4.2 Support

Open Box will provide 20 hours post go-live support for 10 working days immediately following the production deployment.

## 1.5 RESPONSIBILITIES

1. Open Box will be responsible for:
  - a. Providing the services described in the project [Objectives](#).
  - b. Delivering a progress report to Grainger PLC on a regular basis that will include:
    - i. General project health / status update
    - ii. Project risks
    - iii. Milestones and timeline
    - iv. Any significant changes to project scope, cost or timeline forecasts.
2. Grainger PLC will be responsible for:
  - a. Making an internal product owner or project sponsor available to facilitate decision making.
  - b. Making key personnel and stakeholders available throughout the project lifecycle, including participation in the activities detailed in the [Delivery Approach](#).
  - c. Delivering any required information or content in a timely manner.
  - d. Analysis, development, testing and implementation of any changes required to Salesforce integration with Qube, and delivering these changes within a timeframe that does not impede the delivery of this project. See [Dependencies](#).

## 1.6 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.

## 1.7 REFERENCES

- Grainger PLC – Commercial Lead to Lease – Rough Order of Magnitude.pdf
- *Business Optimization: Asset Commercial Property Reporting - Working group & Open Box kick off meeting held on 31<sup>st</sup> January 2024.*

## 2 DEPENDENCIES, ASSUMPTIONS & EXCLUSIONS

### 2.1 DEPENDENCIES

This project is dependent on enhancements to the integration between Salesforce and Qube. Grainger PLC will be responsible for the analysis, development, testing and implementation of these enhancements.

These integration changes include:

- Enabling estates, building and commercial units to be available in Salesforce, and synced between Salesforce and Qube, while a property is still in development.
- Enabling accounts, opportunities and tenancies for commercial leases to be created in Salesforce and automatically synced between Salesforce and Qube, while a property is still in development.

Open Box's ability to deliver the project within the estimated timelines is contingent on Grainger PLC completing the required integration changes and making all requisite commercial property master data available in Salesforce by the end of Sprint 1.

### 2.2 ASSUMPTIONS

The following assumptions have been made; incorrect assumptions may affect project timelines and costs.

1. One (1) dashboard and 4 - 6 reports or charts will be provided.
2. A single commercial lead-to-lease process will accommodate all new commercial leases.
3. The same payment functionality that is currently utilized in the residential lead-to-lease process will be used, without requiring modification.
4. Any referencing or screening of new commercial tenants and associated persons that is different to the existing referencing process for residential leases, will be conducted outside of Salesforce.
5. All Asset Management and Investment Committee members required to approve commercial offers are, or will be, Salesforce users.
6. If documents and emails are generated by Salesforce during the commercial leasing journey: There will be a single set of document and email templates, supplied by Grainger PLC, that will be used for all new commercial leases.



## 2.3 EXCLUSIONS

The following is not included in the cost or scope of this project.

1. Release 1 will not include:
  - a. The automated generation of lease contract documents.
  - b. Red-lining of changes between successive lease, offer or heads of term documents.
  - c. Management of lease signing via Salesforce (e.g. via Adobe Sign).
  - d. Any changes to the existing residential lead-to-lease process.
  - e. An agent portal.
  - f. Prospects/tenants, agents or lawyers having direct interaction with the Salesforce leasing journey.
  - g. Enhancements to the Salesforce price book.
  - h. A rent review process for commercial leases.
  - i. A renewals process for commercial leases.
  - j. A move-in process for commercial tenants.
  - k. Enhancements to the Salesforce end-of-tenancy process to incorporate commercial units.
2. Data clean-up or data migration.
3. Analysis or development of new or enhanced integration between Salesforce and any other applications (including Qube).
4. Solution documentation, other than user stories and an end-user guide.
5. End-user training or change management.
6. Third-party costs, license fees, subscriptions or services.
7. Hardware and infrastructure.

### 3 COST AND TIMELINES

Open Box will provide the following services:

- A Salesforce Technical Architect and Senior Business Analyst will conduct Sprint 0 for the project on a Time and Materials (T&M) basis at £150 per hour. During Sprint 0, the solution requirements will be assessed, release 1 of the project will be scoped and estimated, and sufficient analysis will be conducted in order to commence Sprint 1 development.
  - Sprint 0 is estimated to require 4 – 5 weeks to complete and utilize 80 – 120 hours.
  - The cost for Sprint 0 is therefore estimated to be £12 000 - £18 000.
  - Billable hours for Sprint 0 will not exceed 120 hours without prior agreement from Grainger PLC.
- An agile sprint team delivering sprints at a cost of £18 900 per sprint.
  - Release 1 is currently projected to require 2 - 3 sprints (£37 800 - £56 700).
  - The team will be staffed to include the following skillsets as required:
    - Technical Architect
    - Business Analyst
    - Developer
    - Quality Assurer
    - Project Manager
- UAT support at a minimum cost of £1 575 per week.
  - Open Box has included 40 hours of cover to be provided over a 2 week period (10 working days) to support the [UAT](#) process and fix any new bugs identified (£3 150).
  - UAT support will be billed for the duration of the UAT period (i.e., from the end of the final sprint until UAT sign-off by Grainger PLC) on a pro-rata basis.

- Production deployment and post-go live [support](#) at a minimum cost of £ 800 per week.
  - Open Box has included 20 hours to be provided over a 2 week period (10 working days), immediately following the production deployment (£1 600).
- Open Box has included 5 days (40 hours) of Business Analysis time to create a user guide, at a cost of £630/day – giving a total of £3 150.
- The total project duration is expected to be 12 - 16 weeks, as well as an additional 2 weeks for post go-live support.
- The total cost is estimated to be £54 550 - £79 450.

Project Phases	Duration	Lower Bound	Upper Bound
Sprint 0	4 - 5 weeks	£ 12 000	£ 18 000
Sprint 1 - 3	6 - 9 weeks	£ 37 800	£ 56 700
UAT	2 weeks	£ 3 150	£ 3 150
Production Deployment & Post Go-Live Support	2 weeks	£ 1 600	£ 1 600
User Guide creation	1 week	£3 150	£3 150
<b>Total</b>	<b>14 - 18 weeks</b>	<b>£ 57 700</b>	<b>£ 82 600</b>

These costs and timelines are forecasts that will be refined at the end of each sprint based on continuous feedback, backlog refinement and re-prioritization.

All amounts are quoted in GBP and exclude VAT, if applicable.

Project costs will be billed monthly, in arrears.

This quotation is valid for 30 days.

### 3.1 EXTENSION OF SERVICE PERIOD

The provision of these services may be extended, by mutual agreement between Open Box and Grainger PLC.

Email communication is considered sufficient and binding for this purpose.

## 4 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: *Sam Duncan*  
Sam Duncan (Sep 3, 2024 15:03 GMT+2)

Name: Sam Duncan

Position: Salesforce Director

Date: 09/03/24

Signature: *Sarah Norstrom*  
Sarah Norstrom (Sep 3, 2024 13:35 GMT+1)

Name: Sarah Norstrom

Position: Director of Asset Management

Date: 09/03/24