

Rough Order of Magnitude Estimate

Project

Change of Sharer Process – Grainger plc

Request Date 28th March 2024

ROM Date 24th April 2024

Background & Context

Occupancy of a unit may change during the lease term, or on renewal. This *Change of Sharer* process is currently managed by the Renewals Team entirely offline and often requires tenants to complete multiple forms with duplicate information. Grainger have identified that moving this process into Salesforce would make the time-consuming process more efficient as well as improve customer experience.

Summary of Proposed Changes

1. Create a new opportunity workflow within Salesforce for the change of sharer process. The workflow will be a subset of the new lease opportunity process, for example reference checks are only required for any new tenant(s) and no holding deposit is paid.
2. Enable the Renewals Team to process a change of sharer mid-lease term, creating a change of sharer opportunity that is a child of the original lease opportunity.
3. Generate and email a single form to the lead tenant to complete details of all vacating & new tenants.
4. Generate a new tenancy agreement for new and remaining tenants to sign digitally.
5. Automatically generate a new tenancy in Salesforce with the updated contact roles.
6. Incorporate the change of sharer process into the renewal opportunity workflow, enabling the Renewals Team to process a change of sharer on lease renewal (where required).

Assumptions

- Any new or enhanced integration between Salesforce and other applications that may be required (e.g., generating a new lease and transferring the deposit in Qube) will be developed by Grainger.
- The existing reference check functionality can be used without any modifications.

Exclusions & Limitations

- There will be a single workflow for mid-lease changes & a single process for changes on renewal.
- Depending on requirements for 3 above, Grainger may need to purchase Customer Community licenses from Salesforce (list pricing shown at <https://www.salesforce.com/products/customer-self-service-pricing/>). The cost of this is not included in this ROM.

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Project Phase	Estimated Effort	Estimated Cost (excl. VAT)	Estimated Duration
Analysis & Solution Architecture billed on a Time & Materials (T&M) basis @ £120/hour.	80–120 hours	£9 600 - £14 400	4 – 5 weeks
Delivery billed @ £35 100 per sprint.	2-3 sprints	£70 200 - £140 400	6 - 9 weeks
UAT billed on a T&M basis @ £150/hour.	40 hours	£4 800	2 weeks
Support billed on a T&M basis @ £150/hour.	20 hours	£2 400	2 weeks
Total		£87 000 - £126 900	14-17 weeks

Terms and Conditions:

1. This is not a quote but an indication of cost. The estimates and proposed changes in this document were made prior to any detailed analysis and are subject to change on further analysis. The final estimated cost and timeline will be delivered on completion of the project's analysis phase / sprint zero. Regular updates regarding any significant changes in cost or scope will be delivered to Grainger plc as and when they occur.
2. Cost estimates are based on billing rates as at the ROM date, which are subject to change.