Statement of Work

Version 0.2 | 11/3/2025

Grainger plc
Lead Optimisation - Consulting

DRAFT

Contents

1. STATEMENT OF WORK

1.1 OVERVIEW

This Statement of Work ("SOW") is entered into between Open Box Software (Pty) Ltd ("Open Box"), and Grainger plc ("Grainger").

Grainger have requested that Open Box assist in reviewing and redesigning their existing Lead Management process within Salesforce.

The project aims to improve lead conversion through faster response times, customer self-service capabilities, and automations while leveraging existing licences. This project will focus on the initial part of the lead management process up until the customer's final viewing.

Improving lead conversion rates would reduce the cost per let, requiring fewer leads to fill vacant units and, in turn, reducing the workload required to manage fewer leads. A guided, system-led process would make it easier to skill-up staff to temporarily assist the Lettings Team at peak periods, and would enable Resident Services Teams to serve customers and schedule viewings.

1.2 SOLUTION OVERVIEW

The proposed solution would address the following objectives:

- **Speed of Response** – Improve the speed with which Grainger responds to new customer leads within an agreed timeframe that can be monitored and measured.

- **Self-Serve Capability** – Enable customers to proceed further in the enquiry journey before the Lettings Team needs to intervene. Allow customers to access more information about relevant properties and select viewing times; potentially booking viewings for vacant units online.

- **Lead Conversion Automation** - Further automate the enquiry process in Salesforce to produce a qualified lead with minimal intervention from the Grainger Lettings team, enabling the customer to self-serve as much as possible. Automate the lead nurture journey, such as 'keep in touch' communications where a proceedable leads does not convert to a let.

- **Property Matching** – Assist Grainger users in identifying similar units in the same area that a lead may also be interested in. Potentially automating suggestions of similar units where a proceedable lead does not convert.

- **Communication Channels** – Integrate relevant communication channels in Salesforce (which may utilize Salesforce, Zoom Contact Centre and other providers). Provide a seamless omni-channel experience for the customer where a Grainger user can pick up a communication from any channel and continue the conversation.

- **Data** – Improve data quality controls. Ensure relevant customer data is collected to support reporting and analytics (such as improved visibility into the source and channel of leads).

1.3 OBJECTIVES

The objectives of this project are to:

1. Conduct a series of workshops with Grainger stakeholders to review the as-is process maps (to be completed by Grainger), assess the key solution requirements, and design a future-state Lead Management process.

2. If necessary, develop a proof-of-concept that demonstrates key aspects of the proposed solution.

3. Compile a feature backlog in Jira that captures the outcomes to be delivered.

    a. The backlog will be used during an iterative delivery phase to identify, develop and deploy the most valuable features for each release.

    b. The features will be sized and prioritized relative to each other.

    c. Note this initial engagement will not provide detailed user stories; these will be addressed in a subsequent delivery phase that includes a sprint zero.

4. Open Box will deliver a solution proposal document that includes:

    a. A high-level, future-state process diagram.

   b. A high-level design for the features to be delivered, including:

     i. Proposed data model

     ii. Recommended project phasing, if more than one release is required.

     iii. Integration

     iv. Recommended approach to:

       1. Data sharing and visibility

       2. Data archival

       3. Document/file management

       4. Reporting

5. Provide a forecast of the number of sprints, cost & timeline required to deliver the proposed feature 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.

1.4 RESPONSIBILITIES

1. Open Box will be responsible for:

   a. Providing the services and deliverables described in the Objectives.

   b. Delivering a progress report to Grainger on a regular basis that will include:

     i. Progress and milestones.

     ii. Any outstanding deliverables.

     iii. Hours utilized to date.

     iv. Forecast of remaining hours that are likely to be required by Open Box.

2. Grainger will be responsible for:

   a. Mapping out the current 'As Is' Lead Management process prior to the commencement of this project and identifying the aspects of the process that this project should focus on.

   b. Making key personnel and stakeholders available to Open Box.

   c. Making a Grainger project sponsor available to facilitate decision making.

   d. 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 (GMT +02:00) which currently corresponds to 8am – 5pm BST, excluding public holidays.

2. All work will be completed by Open Box offsite.

1.6 REFERENCES

- *Lead Optimisation – SOW Discussion* Zoom meeting held on 22/10/2025.

2. SOFTWARE DEVELOPMENT PROCESS

2.1 SECURE SOFTWARE DEVELOPMENT POLICY

1. Open Box personnel, including any outsourced personnel, will follow the Open Box *Secure Software Development Policy* when performing software development and implementation.

2. This policy includes, but is not limited to, the following:

    a. Separated responsibilities for development, testing with a designated person(s) for production deployments.

    b. Ensuring confidential and restricted (e.g. personal, financial, health) production data is not used in development or testing environments unless required.

    c. Considering privacy and security at each stage of the Software Development process.

    d. Completing code reviews for major development changes.

3. A copy of the Open Box *Secure Software Development Policy* is available on request.

2.2 ARTIFICIAL INTELLIGENCE (AI) DEVELOPMENT TOOLS

1. Open Box may, at its discretion, use Large Language Model (LLM)-based generative AI coding tools ("AI Tools") in the design, development, testing and delivery of software solutions and related services under this Agreement. Open Box will remain responsible for all outputs produced.

2. AI tools such as GitHub Copilot and Microsoft Copilot may be used to assist with delivery of the project.

3. ASSUMPTIONS & EXCLUSIONS

3.1 ASSUMPTIONS

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

1. It is not expected that the project will require any data migration.

3.2 EXCLUSIONS

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

1. This project will not address all lead-related enhancements. This project aims to improve the initial part of the Lead Management process up until the customer's final viewing. As such, no changes will be made to the current functionality of the lettings portal or referencing process.

2. It is expected that enhancements to capture detailed marketing channel data (linking Google or Meta ad clicks to leads and sending conversion data back to Google/Meta) would be addressed as a separate project or as part of the BAU project.

3. Evaluating existing and potential customer lifetime value is a separate project.

4. Any enhancements to the Grainger website (for example suggesting alternate properties or units that the customer may also be interested in).

5. Change management or end-user training; this will be the responsibility of Grainger.

6. Solution documentation, other than user stories.

7. Third-party costs, license fees, subscriptions or services.

8. Hardware and infrastructure.

4.   COST AND TIMELINES

Open Box will provide the following services:

- o   An Open Box Salesforce Technical Architect, Senior Business Analyst, and Residential Lettings & Operations SME will be available on a time & materials (T&M) basis.
- o   Time spent will not exceed upper bound estimates without prior approval from Grainger.

The total cost of this project is estimated to be **£15,120 – £18, 900**.

The total duration of this project is estimated to be **4 weeks**.

Table 1: Estimated Project Cost

Project Phase	Estimated Duration	Estimated Lower Bound	Estimated Upper Bound
Consultancy	4 weeks	£ 15,120	£ 18,900
Estimated Total	**4 weeks**	**£ 15,120**	**£ 18,900**

1. All amounts are in GBP (£) and excludes any VAT or sales taxes, if applicable.
2. Costs exclude travel or onsite analysis; the consultancy will be provided remotely.
3. Cost will be reported to Grainger on a weekly basis during the project.
4. Costs will be billed monthly, in arrears and must be paid within 30 (thirty) calendar days of the date of the invoice.
5. This quotation is valid for 30 days.

5. 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: _____

Signature: _____

Name: Sam Duncan

Name: _____

Position: Salesforce Director

Position: _____

Date: _____

Date: _____