



Statement of Work

GRAINGER
DATA STORAGE – CLEAN UP AUTOMATION

*Version 1.0
October 20, 2025*

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1 STATEMENT OF WORK

1.1 OVERVIEW

Due to data accumulated since the initial Salesforce implementation in 2019, Grainger has recently exceeded their Salesforce org's allocated 15.6GB data storage. To ensure continued compliance, Grainger either needs to purchase additional data storage from Salesforce or remove data from the platform to reduce the total data storage usage.

Salesforce have provided Grainger with two solutions to deal with the overage:

1. Purchase additional data storage at circa £12,000 per year for the remainder of Grainger's Salesforce 5-year contract, totalling approximately £60,000.
2. Purchase and implement [Salesforce Archive](#) – a solution that removes the data from the Salesforce but allows archived records to be surfaced through the Salesforce UI in case of legal or operational scenarios that require access to historical records. This option carries a cost of circa £9,600 per year, totalling approximately £48,000 across the 5-year contract. This option would also require additional work from the Grainger Data Team to ensure that these archived records are saved in the Grainger data warehouse to be available for other processes.

Open Box's initial advice provided via the T&M Support SOW advised that Grainger could avoid any additional Salesforce costs and should instead attempt to identify and delete historical records that hold little or no business value and are outside of any official data retention policy. Grainger has agreed on this strategy and is currently working with Open Box to manually delete records meeting the above criteria and bring Grainger's Salesforce org back into compliance.

Since the above exercise is a one-time task, an automated process should be implemented for ongoing removal of such records to prevent unnecessary data storage use.

1.2 OBJECTIVES

The objectives of this project are to:

1. Conduct sufficient upfront analysis in order for Open Box to be in a position to commence development.
 - a. Document the solution requirements and outcomes to be delivered in an initial, prioritized project backlog.



- b. Write user stories, with detailed acceptance criteria, for the features that are anticipated to be addressed first. Acceptance criteria will be reviewed and agreed with Grainger.
2. After initial analysis, provide a revised forecast of the estimated effort, cost & timeline required to deliver the project backlog.
3. Deliver the following solution:
 - a. Develop scheduled Apex batch jobs that will run daily in the Grainger Salesforce org to:
 - i. Use a set of agreed selection criteria to identify all records that should be deleted (e.g. all emails sent by a graingerplc.co.uk domain and with a subject starting with "Viewing Confirmation" and sent more than 360 days ago).
 - ii. Delete each identified record

1.3 DELIVERY APPROACH

Due to a relatively well defined and small scope, the delivery approach will be based on the Kanban agile framework where features will be analysed, developed, tested and delivered continuously throughout 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 collaborate. Grainger stakeholders will have access to the backlog which will serve as the single source of truth with regards to scope.

Grainger representatives will be required to participate in backlog refinement, demos and stand-up ceremonies.

1.3.1 UAT

Grainger will be responsible for testing the functionality delivered and ensuring that the solution is performing as expected during the UAT period.

Issues raised will be classified as bugs or enhancements. Bugs will be fixed during the UAT period. Any other enhancements or new requirements will be added to the backlog for future development or addressed by extending the project timelines (by mutual agreement between Grainger and Open Box).



1.3.2 Support

Open Box have estimated 8 – 10 hours of hypercare support over 10 working days immediately following the production deployment.

1.4 RESPONSIBILITIES

1. Open Box will be responsible for:
 - a. Providing the services described in the project [Objectives](#).
 - b. Delivering a progress report to Grainger on a regular basis that will include:
 - i. General status update & project health
 - ii. Project risks
 - iii. Milestones and timelines
 - iv. Any significant changes to project scope, cost, or timeline forecasts.
2. Grainger will be responsible for:
 - a. Making key personnel and stakeholders available throughout the project lifecycle, including participation in the activities detailed in the [Delivery Approach](#).
 - b. Ensuring there are no other projects planned or in operation that may hinder this project.

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. A defined escalation path will be provided to the agreed project manager should urgent assistance be required outside of these times.
3. All work will be completed by Open Box offsite.
 - a. It is not expected that the project will require Open Box resources on-site. Where onsite personnel are required, all reasonable expenses for travel and subsistence shall be reimbursed by Grainger. Open Box shall not bill any mark-up or administration fee for any such expenses. Approval for expenses shall be obtained from Grainger prior to being incurred.



1.6 REFERENCES

- Grainger, Open Box meeting: Data Storage Usage (Friday 19th September, 2025)
- <https://graingerplc.atlassian.net/browse/BSS-149>
- "Data Storage Cleanup Consultancy Findings.pdf"
- Grainger, Open Box meeting: Salesforce Data Storage - Out of "compliance" & Options to resolve (Monday 29th September)
- Grainger, Open Box meeting: Salesforce Data Storage - Out of "compliance" - review and next stages (Friday 10th October)



2 PROJECT RISKS, ASSUMPTIONS & EXCLUSIONS

2.1 RISKS

The project will result in ongoing deletion of records – the records will not be exported each day and there will be no other archiving methods to be able to restore any deleted records.

2.2 ASSUMPTIONS

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

1. The largest objects identified for automated deletion during the initial consultation, that will be addressed as part of this project, include:
 - a. Email Messages
 - b. Payments
 - c. Tenancy Payment Schedules
 - d. Agreement Notifications
2. Grainger will obtain approval from the relevant internal stakeholders to ensure the final deletion criteria comply with Grainger's relevant data retention policies.

2.3 EXCLUSIONS

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

1. Advising or consulting on Grainger data retention policies
2. Analysis of objects outside of those identified in 2.2 above
3. Archiving or providing ongoing exports of records to be deleted.
4. Deleting any records in other systems other than Salesforce
5. Salesforce costs, license fees, subscriptions, or services.
6. Hardware and infrastructure.
7. Solution documentation, other than user stories.
8. End-user training, change management or new / updated training materials.



3 COST AND TIMELINES

Open Box will develop, test and deploy the solution on a Time & Materials (T&M) basis at a rate of £126/hour.

The team will be staffed to include the following skillsets as required:

- Salesforce Technical Architect
- Business Analyst
- Developers
- Quality Assurer
- Project Manager

The estimated effort and costs per phase are shown in the table below:

Phase	Hours	Lower Bound	Upper Bound
Analysis	10 - 20	£1,260	£2,520
Build	40 - 60	£5,040	£7,560
Project Management	4 – 5	£504	£630
UAT	20 - 30	£2,520	£3,780
Production Support	8 -10	£1,008	£1,260
Total	82 - 125	£10,332	£15,750

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

The project cost will be billed monthly, in arrears. The cost will not exceed the upper limit of £15,750 without prior consultation.

This quotation is valid for 30 days.



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

Signature: _____

Signature: _____

Name: Sam Duncan

Name:

Position: Salesforce Director

Position:

Date: _____

Date: _____

