TeamACE CRM-ERP Platform

Phase 1: Resource and Financial Plan (Lean Model)

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1. Executive Summary

This document outlines a lean, AI-augmented development approach for Phase 1 of the TeamACE CRM-ERP Platform. By leveraging existing Rozitech Central codebase (60% reuse) combined with AI-assisted development, we deliver core functionality at significantly reduced cost.

Key Figures

Metric	Value
Project Duration	90 days (3 months)
Team Size	2 developers (60% allocation)
AI Augmentation	Claude MAX (2 seats)
Monthly Burn Rate	$7,941
TOTAL PROJECT INVESTMENT	**$37,212**

Cost Efficiency

Factor	Impact
Rozitech Central Codebase Reuse	60% average
AI-Assisted Development	+40% productivity
Lean Team (60% allocation)	2 developers
Original Full-Team Estimate	$162,080
Lean Model Investment	$37,212
Savings	**$124,868 (77%)**

Payment Milestones Summary (30/60/90 Days)

Milestone	Day	Deliverable	Amount (USD)	%
M0	0	Project Kickoff	$5,582	15%
M1	30	Core CRM Complete	$7,442	20%
M2	60	CRM + BD Basics	$9,303	25%
M3	90	+ Finance Basics	$11,164	30%
M4	104	Go-Live & Handover	$3,721	10%
		TOTAL	**$37,212**	**100%**

2. Project Overview

2.1 Approach: AI-Augmented Lean Development

This engagement uses a lean development model that combines:

1. **Existing Codebase Reuse (60%)**: Leverage proven patterns from Rozitech Central's 11 production applications
2. **AI Pair Programming**: Claude MAX for code generation, testing, and documentation
3. **Part-Time Senior Resources**: Expert developers at 60% allocation for flexibility
4. **Focused Scope**: Deliver core value first, defer advanced features to Phase 2

2.2 Phase 1 Scope (Lean Model)

Module	Included	Deferred to Phase 2
Core CRM	Clients, Contacts, Engagements, Documents, Activities	Advanced search views
Business Development	Leads, Pipeline Kanban, Opportunities, Basic Proposals	PDF generation, Forecasting
Finance Light	Invoice CRUD, Line Items, Payment Recording	PDF generation, Aging Reports, Statements
HR Outsourcing	-	Full module (Phase 2)
Workflow	Basic Notifications	Approvals, Tasks, Email notifications

2.3 Deliverables Summary

Metric	Day 30	Day 60	Day 90
Screens	8-10	18-22	30-35
API Endpoints	15-20	35-40	55-65
Modules	1 partial	2 complete	3 complete
Test Coverage	60%	70%	80%

3. Resource Planning

3.1 Team Composition (60% Allocation)

Role	Allocation	Monthly Rate (USD)	Responsibilities
Technical Lead	60%	$4,235	Architecture, complex logic, code review, client communication
Intermediate Developer	60%	$2,471	Feature development, AI-assisted coding, testing
Claude MAX AI	2 seats	$200	Code generation, test creation, documentation
TOTAL		**$6,906**	

3.2 Why 60% Allocation Works

Factor	Benefit
Code Reuse (60%)	Only 40% new code required
AI Assistance (+40%)	Accelerates routine development
Proven Patterns	No architecture exploration needed
Focused Scope	Clear priorities, no scope creep
Async Communication	Efficient use of development time

3.3 Technology Stack (Pre-existing)

All technology decisions leverage existing Rozitech Central stack:

Layer	Technology	Reuse Source
Backend	Node.js, Express.js	All 11 apps
Frontend	React 18, Vite, Tailwind CSS	All 11 apps
Database	PostgreSQL (multi-tenant)	All 11 apps
Authentication	JWT, Google OAuth SSO	Auth Server
Hosting	Render.com	Existing infrastructure
CI/CD	GitHub Actions	Existing pipelines

4. Delivery Schedule

4.1 Sprint Overview (90 Days)

Sprint	Days	Focus	Key Deliverables
1-2	1-28	Core CRM	Clients, Contacts, Documents, Activities
3-4	29-56	CRM + BD	Engagements, Leads, Pipeline start
5-6	57-90	BD + Finance	Pipeline complete, Opportunities, Basic Invoicing

4.2 Day 30 Milestone: Core CRM Foundation

Investment to Date: $7,442 (M0 + M1)

Deliverable	Status	Reuse %
Client List, Create, Edit, View	Complete	70%
Contact Management (CRUD)	Complete	70%
Activity Logging (automatic + manual)	Complete	60%
Document Upload & Management	Complete	80%
Authentication (SSO integrated)	Complete	90%
Dashboard Shell with Navigation	Complete	70%
Basic Search & Filtering	Complete	60%

Screens: 8-10 | **APIs:** 15-20 endpoints

4.3 Day 60 Milestone: CRM Complete + BD Basics

Investment to Date: $16,745 (M0 + M1 + M2)

Deliverable	Status	Reuse %
Engagement CRUD	Complete	50%
Engagement Status Workflow	Complete	40%
Lead Capture Form	Complete	50%
Lead List & Detail Views	Complete	50%
Lead Status Workflow	Complete	40%
Lead Assignment	Complete	60%
CRM Dashboard Widgets	Complete	70%
Pipeline Kanban Board	Started	70%

Screens: 18-22 | **APIs:** 35-40 endpoints

4.4 Day 90 Milestone: BD Pipeline + Finance Basics

Investment to Date: $27,909 (M0 + M1 + M2 + M3)

Deliverable	Status	Reuse %
Pipeline Kanban (drag-drop)	Complete	70%
Opportunity Management	Complete	50%

Deliverable	Status	Reuse %
Basic Proposal (form-based)	Complete	60%
Invoice List & Create	Complete	80%
Invoice Line Items	Complete	80%
Payment Recording	Complete	70%
Basic In-App Notifications	Complete	70%
User Profile & Settings	Complete	90%

Screens: 30-35 | **APIs:** 55-65 endpoints

4.5 Day 104 Milestone: Go-Live

Total Investment: $37,212

Deliverable	Status
Production Deployment	Complete
Data Migration (if needed)	Complete
User Training (2 sessions)	Complete
Documentation Handover	Complete
14-Day Warranty Period	Started

5. Financial Model

5.1 Monthly Cost Breakdown

Category	Monthly (USD)	% of Total
Salaries (60% allocation)		
Technical Lead (60%)	$4,235	53.3%
Intermediate Developer (60%)	$2,471	31.1%
Subtotal Salaries	**$6,706**	**84.4%**
Operating Expenses		
Claude MAX AI (2 seats)	$200	2.5%
Infrastructure (Dev + Staging)	$882	11.1%
Software & Tools	$100	1.3%
Miscellaneous	$53	0.7%
Subtotal Expenses	**$1,235**	**15.6%**
TOTAL MONTHLY BURN	**$7,941**	**100%**

5.2 3-Month Project Cost

Category	Monthly	3 Months (USD)
Salaries (60%)	$6,706	$20,118
AI Tools	$200	$600
Infrastructure	$882	$2,647
Other Expenses	$153	$459
BASE COST	**$7,941**	**$23,824**
+42% Markup		$10,006
Subtotal		$33,830
+10% Contingency		$3,383
TOTAL PROJECT		**$37,212**

5.3 Cost Comparison

Model	Monthly Burn	90-Day Total	Scope	Savings
Original (Full Team)	$34,588	$162,080	100%	-
AI-Optimized	$24,029	$112,523	100%	31%
Bare Bones (100%)	$12,765	$59,815	100%	63%
Lean (60%)	**$7,941**	**$37,212**	**60%**	**77%**

5.4 Value Analysis

Metric	Value
Cost per Screen	$1,063 - $1,240
Cost per API Endpoint	$573 - $677
Cost per Module	$12,404
Effective Hourly Rate	$34.40

6. Payment Schedule

6.1 Milestone-Based Payments

Milestone	Day	Deliverables	Amount (USD)	Cumulative
M0: Kickoff	0	Contract signed, environments setup, Sprint 1 planned	$5,582	$5,582
M1: Core CRM	30	Clients, Contacts, Documents, Activities, Dashboard	$7,442	$13,024
M2: CRM + BD	60	Engagements, Leads, Pipeline started	$9,303	$22,327

Milestone	Day	Deliverables	Amount (USD)	Cumulative
M3: Full MVP	90	Pipeline complete, Invoicing, Notifications	$11,164	$33,491
M4: Go-Live	104	Production deployment, training, warranty	$3,721	$37,212

6.2 Payment Terms

Term	Details
Payment Method	Bank transfer (Wire/SWIFT)
Currency	United States Dollar (USD)
Invoice Terms	Net 7 days from milestone acceptance
Late Payment	2% per month on overdue amounts
Early Payment	2% discount for payment within 3 days

6.3 Milestone Acceptance Criteria

M0: Project Kickoff (Day 0) - $5,582

☐ Contract fully executed
☐ Development environment provisioned
☐ Repository created with base project structure
☐ CI/CD pipeline configured
☐ Sprint 1 backlog groomed and estimated

M1: Core CRM Complete (Day 30) - $7,442

☐ Client CRUD operations functional
☐ Contact management operational
☐ Document upload working (up to 10MB)
☐ Activity logging (auto + manual)
☐ Dashboard with navigation
☐ Basic search functional
☐ 60% test coverage

M2: CRM + BD Basics (Day 60) - $9,303

☐ Engagement management complete
☐ Lead capture and list views
☐ Lead status workflow
☐ CRM dashboard widgets
☐ Pipeline kanban started
☐ 70% test coverage

M3: Full MVP (Day 90) - $11,164

- ☐ Pipeline kanban with drag-drop
- ☐ Opportunity tracking
- ☐ Basic proposal creation
- ☐ Invoice CRUD with line items
- ☐ Payment recording
- ☐ In-app notifications
- ☐ 80% test coverage
- ☐ UAT completed

M4: Go-Live (Day 104) - $3,721

- ☐ Production deployment successful
- ☐ User training completed (2 sessions)
- ☐ Admin documentation delivered
- ☐ 14-day warranty period initiated

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7. Scope Management

7.1 Phase 1 Scope (Included)

Module	Features Included
Core CRM	Client CRUD, Contacts, Engagements, Documents, Activities, Search
Business Development	Leads, Pipeline Kanban, Opportunities, Basic Proposals
Finance Light	Invoice CRUD, Line Items, Payment Recording
Platform	SSO Auth, Dashboard, Notifications, User Settings

7.2 Phase 2 Scope (Deferred)

Module	Features Deferred	Est. Phase 2 Cost
HR Outsourcing	Assignments, Deployments, Service Logs	$12,000 - $15,000
Finance Advanced	PDF Generation, Aging Reports, Statements	$5,000 - $7,000
BD Advanced	Proposal PDFs, Revenue Forecasting	$4,000 - $6,000
Workflow	Multi-step Approvals, Task Management, Email	$6,000 - $8,000
Reporting	Advanced Dashboards, Excel Exports	$3,000 - $5,000
TOTAL PHASE 2		**$30,000 - $41,000**

7.3 Change Control

Any scope changes during Phase 1 will be handled as follows:

Change Type	Process	Rate
Minor (< 4 hours)	Absorb in sprint	Included
Medium (4-16 hours)	Quote and approve	$50/hour
Major (> 16 hours)	Defer to Phase 2	Separate quote

8. Terms and Conditions

8.1 Intellectual Property

- All source code developed for TeamACE becomes TeamACE property upon final payment
- Rozitech retains rights to generic components and frameworks
- Third-party libraries remain under their respective licenses

8.2 Warranty

Period	Coverage
14-Day Warranty	Bug fixes for delivered functionality
Response Time	24 business hours
Exclusions	New features, user errors, third-party issues

8.3 Communication

Channel	Purpose	Frequency
Slack/Teams	Daily updates, questions	Daily
Video Call	Sprint reviews, demos	Bi-weekly
Email	Formal approvals, milestones	As needed

8.4 Assumptions

1. TeamACE provides feedback within 48 hours
2. Business rules clarified before sprint starts
3. UAT resources available in Week 11-12
4. No major scope changes during sprints
5. Single timezone overlap (min 4 hours)

Appendix A: Monthly Burn Breakdown (Visual)

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        MONTHLY BURN: $7,941


 SALARIES (60%)                    $6,706    (84.4%)
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   Technical Lead (60%)          $4,235
   Intermediate Developer (60%)  $2,471

AI TOOLS                           $   200    ( 2.5%)
   Claude MAX (2 seats)            $   200

INFRASTRUCTURE                     $   882    (11.1%)
   Development Server              $   294
   Staging Server                  $   294
   Database                        $   147
   Services (email, etc)           $   147

OTHER                              $   153    ( 1.9%)
   Software Licenses               $   100
   Miscellaneous                   $    53
```

Appendix B: ZAR Equivalent

Item	USD	ZAR (x17)
Monthly Burn	$7,941	R 135,000
Total Project	$37,212	R 632,610
M0 Payment	$5,582	R 94,892
M1 Payment	$7,442	R 126,522
M2 Payment	$9,303	R 158,153
M3 Payment	$11,164	R 189,783
M4 Payment	$3,721	R 63,261

Appendix C: Team Availability

Resource	Mon	Tue	Wed	Thu	Fri
Technical Lead	5h	5h	5h	5h	4h
Intermediate Dev	5h	5h	5h	5h	4h
Daily Total	10h	10h	10h	10h	8h

Weekly Hours: 48 hours | **Monthly Hours:** ~192 hours

Document Approval

Role	Name	Signature	Date
Rozitech Director			
TeamACE Representative			

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This document is confidential and intended for TeamACE and Rozitech use only.