CRM Phase III summary & report   *Internal*   Status Date: 01 August 2018

Project Information

Project name:	CRM Phase III
Project code:	700342 GL 50827
Sponsor:	Josie Tucci supported by Andrew le Duc
Project Manager:	Luke Reader

RAG Status

	Previous	Current
Overall	🟧	🟧
Budget	🟩	🟩
Schedule	🟥	🟥
Scope	🟥	🟥
Resource	🟩	🟩

Financial Summary

	FY2017	FY2018	Total
Baseline	£ 44,092	£ 168,908	£ 213,000
Contingency	£ -	£ -	£ -
Change Requests	£ -	£ -	£ -
Total Approved	£ 44,092	£ 168,908	£ 213,000
Actual Spent To Date	£ 44,092	£ 126,191	£ 170,283
Forecast Total Spend	£ 44,092	£ 126,191	£ 170,283

Project summary

This is the final status report for CRM Phase III.

CRM Phase III was rebaselined to comprise six changes to Neptune, Data Warehouse, HubSpot, and their data-flows, in two releases. Budgeted Capex cost was £213k and there was no Budgeted Opex cost. The key benefit for Yachts and Le Boat is improved rebooking rates due to better CRM customer-targeting.
 - **Release 1** (Neptune system changes to store 'Contact' data, new Neptune/Triton fields to HubSpot, GDPR placeholder fields) is live. After extensive checking of both data and code the new feeds to Hubspot are now signed off, ending the project. Total spend is £170k, all Capex.
 - **Release 2** (Deals History feed) - was descoped after a discovery phase with 3rd-party Sentinel Systems.

Looking ahead, a process of CRM data-cleaning is underway for Marine. A new CRM strategy and plan are also being compiled - this work is temporarily on hold following the Hothouse reviews.

Project timelines

Milestones	Baseline	Forecast
Start Date	12-Jul-17	12-Jul-17
Requirements Baselined	16-Aug-17	21-Aug-17
Decision to buy Reporting Add-On or not	02-Oct-17	28-Nov-17
Finish build of 1st Release	08-Dec-17	08-Dec-17
Signoff Testing of 1st Release	17-Jan-18	26-Apr-18
1st Release Go-Live Completed	22-Jan-18	25-May-18
Supplier signed-up for 2nd Release	01-Feb-18	26-Feb-18
2nd Release Live	*01-Aug-18*	*Descoped*

Top 5 issues	Impact Comment	Priority	Owner	Date	Resolution Actions

Top 5 risks	Impact Comment	Priority	Owner	Date	Resolution Actions