**Greenfield Digital**
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PROJECT PROPOSAL

# Business Intelligence Dashboard

One trusted view of performance for Stonebridge Manufacturing

PREPARED FOR
**Helen Murphy**
Stonebridge Manufacturing

PREPARED BY
**Tom Alvarez**
Greenfield Digital

PROPOSAL DATE
**October 21, 2026**

ESTIMATED START
**November 23, 2026**
Duration: 13 weeks

ESTIMATED BUDGET
**USD 82,836.00**

REFERENCE
**GD-P-0220**

## 01 Project Overview

Stonebridge Manufacturing reports on performance from several spreadsheets that rarely match. This project builds a central data warehouse and dashboards for sales, operations and finance, with automated daily refreshes.

| START DATE | DURATION | BUDGET | PROJECT LEAD |
|---|---|---|---|
| November 23, 2026 | 13 weeks | USD 82,836.00 | Tom Alvarez |

## 02 Objectives

- ✓ Replace manual reporting with automated dashboards
- ✓ Reconcile sales, operations and finance data
- ✓ Refresh every report daily without manual work
- ✓ Train managers to explore data themselves

## 03 Scope of Work

### In scope

- ✓ Data source audit and modeling
- ✓ Data warehouse setup
- ✓ Dashboards for sales, operations and finance
- ✓ Training and documentation

### Out of scope

- – Predictive modeling
- – Data science consulting beyond launch
- – Replacing source systems

## 04 Timeline & Milestones

| PHASE | DELIVERABLES | START | END |
|---|---|---|---|
| **Discovery** | Data sources, metrics and dashboard plan | Nov 23, 2026 | Dec 4, 2026 |
| **Data warehouse** | Pipelines, models and data quality checks | Dec 7, 2026 | Jan 8, 2027 |
| **Dashboards** | Sales, operations and finance dashboards | Jan 11, 2027 | Feb 5, 2027 |
| **Rollout** | Training, handover and two weeks of support | Feb 8, 2027 | Feb 19, 2027 |

## 05 Budget

The budget below is based on the estimated effort for each workstream. All amounts are in USD.

| WORKSTREAM | HOURS | RATE | COST |
|---|---|---|---|
| **Discovery & metric design** | 60 | 145.00 | **8,700.00** |
| **Data pipelines & warehouse** | 220 | 140.00 | **30,800.00** |
| **Dashboard development** | 180 | 125.00 | **22,500.00** |
| **Data quality & testing** | 80 | 115.00 | **9,200.00** |
| **Training & handover** | 50 | 110.00 | **5,500.00** |

| | |
|---|---|
| Subtotal | **76,700.00** |
| Contingency (8%) | **6,136.00** |
| **Total budget (USD)** | **82,836.00** |

### Payment schedule

| MILESTONE | SHARE | AMOUNT |
|---|---|---|
| Contract signature | 30% | **24,850.80** |
| Midpoint approval | 30% | **24,850.80** |
| Go-live | 40% | **33,134.40** |

## 06 Project Team

**Tom Alvarez**
**Delivery Director**

Overall delivery, budget and stakeholder communication.

| | |
|---|---|
| **Nina Petrova**<br>Data Analyst | Metric definitions, dashboards and data quality checks. |
| **Sam Okafor**<br>Data Engineer | Pipelines, data warehouse and automated refreshes. |

## 07 Assumptions

- ✓ Stonebridge Manufacturing provides read access to every source system within two weeks of kickoff
- ✓ Metric definitions are signed off by one owner per department
- ✓ Feedback on each deliverable is provided within five business days

**CHANGE REQUESTS**

Requests outside the agreed scope are estimated in writing and only started after your approval. Approved changes may affect the timeline and budget.

## 08 Approval

Signing below confirms approval of the scope, timeline and budget described in this proposal.

**FOR GREENFIELD DIGITAL**

**Tom Alvarez**
Delivery Director

Date: _____

**FOR STONEBRIDGE MANUFACTURING**

**Helen Murphy**
Chief Financial Officer

Date: _____