Greenfield Digital
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PROJECT PROPOSAL

CRM Implementation

Giving BlueHarbor Logistics one place to manage every customer relationship

PREPARED FOR
Luis Ortega
BlueHarbor Logistics

PREPARED BY
Maya Chen
Greenfield Digital

PROPOSAL DATE
October 30, 2026

ESTIMATED START
November 30, 2026
Duration: 12 weeks

ESTIMATED BUDGET
USD 58,465.00

REFERENCE
GD-P-0223

01 Project Overview

BlueHarbor Logistics tracks customers in spreadsheets and several unconnected tools, so sales and support lack a shared view. This project implements a CRM, migrates existing contacts and deals, and connects it to email and billing.

START DATE	DURATION	BUDGET	PROJECT LEAD
November 30, 2026	12 weeks	USD 58,465.00	Maya Chen

02 Objectives

- ✓ Give every team one view of each customer
- ✓ Migrate 12,000 contacts and 900 open deals without loss
- ✓ Automate follow-up tasks and reminders
- ✓ Go live before the next sales quarter

03 Scope of Work

In scope

- ✓ CRM configuration and customization
- ✓ Data cleanup and migration
- ✓ Email and billing integrations
- ✓ User training and go-live support

Out of scope

- – Marketing automation setup
- – Custom mobile app development
- – Ongoing managed services

04 Timeline & Milestones

PHASE	DELIVERABLES	START	END
Discovery	Requirements, data audit and migration plan	Nov 30, 2026	Dec 11, 2026
Configuration	CRM setup, pipelines and user roles	Dec 14, 2026	Jan 1, 2027
Migrate & integrate	Data migration and email and billing integrations	Jan 4, 2027	Feb 5, 2027
Launch	Training, go-live 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 & planning	50	140.00	**7,000.00**
CRM configuration	110	125.00	**13,750.00**
Integrations	120	135.00	**16,200.00**
Data migration	80	120.00	**9,600.00**
Training & go-live	60	110.00	**6,600.00**

Subtotal	**53,150.00**
Contingency (10%)	**5,315.00**
Total budget (USD)	**58,465.00**

Payment schedule

MILESTONE	SHARE	AMOUNT
Contract signature	30%	**17,539.50**
Design approval	30%	**17,539.50**
Go-live	40%	**23,386.00**

06 Project Team

Maya Chen
Delivery Director

Overall delivery, budget and stakeholder communication.

Nina Petrova Business Analyst	Requirements, workflows and user training.
Sam Okafor Technical Lead	CRM configuration, integrations and data migration.

07 Assumptions

- ✓ BlueHarbor Logistics provides system access and data exports within one week of kickoff
- ✓ Existing contacts are migrated after a one-time cleanup
- ✓ 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

Maya Chen
Delivery Director

Date: _____

FOR BLUEHARBOR LOGISTICS

Luis Ortega
Operations Director

Date: _____