Greenfield Digital
greenfielddigital.com

PROJECT PROPOSAL

Business Intelligence Dashboard

One trusted view of performance for Lumen Healthcare

PREPARED FOR
Raj Kapoor
Lumen Healthcare

PREPARED BY
Maya Chen
Greenfield Digital

PROPOSAL DATE
November 5, 2026

ESTIMATED START
December 7, 2026
Duration: 13 weeks

ESTIMATED BUDGET
USD 82,836.00

REFERENCE
GD-P-0225

01 Project Overview

Lumen Healthcare 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
December 7, 2026	13 weeks	USD 82,836.00	Maya Chen

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	Dec 7, 2026	Dec 18, 2026
Data warehouse	Pipelines, models and data quality checks	Dec 21, 2026	Jan 22, 2027
Dashboards	Sales, operations and finance dashboards	Jan 25, 2027	Feb 19, 2027
Rollout	Training, handover and two weeks of support	Feb 22, 2027	Mar 5, 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

Maya Chen
Delivery Director

Overall delivery, budget and stakeholder communication.

Nina Petrova Data Analyst	Metric definitions, dashboards and data quality checks.
Sam Okafor Data Engineer	Pipelines, data warehouse and automated refreshes.

07 Assumptions

- ✓ Lumen Healthcare 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

Maya Chen
Delivery Director

Date: _____

FOR LUMEN HEALTHCARE

Raj Kapoor
Chief Operating Officer

Date: _____