

CRM Platform Rollout

Project status report · Week of October 12, 2026 · Report SR-14

Project manager **Rebecca Tan** Sponsor **Michael Oduya, VP of Sales**

STATUS

● **At risk**

The rollout is two weeks behind plan because of delayed data cleanup. The launch date holds if the data is signed off by October 30.

KEY FIGURES

Progress	62%	planned 66%
Budget used	66%	318,400.00 of 480,000.00 USD
Next milestone	Data migration sign-off	October 30, 2026
Target finish	December 11, 2026	56 days left

SUMMARY

Configuration and integrations are complete and user training began for the first two regional teams. The main risk is data quality: duplicate accounts in the legacy system are taking longer to resolve than planned. Spend is slightly ahead of plan, and the forecast is 2.5% over budget, mostly from extra cleanup effort.

HEALTH

AREA	STATUS	COMMENT
Schedule	● At risk	Data migration is two weeks late. Training and launch dates are unchanged for now.
Budget	● On track	Forecast is 2.5% over the approved budget, within the 5% tolerance.
Scope	● On track	No approved changes this period. One request is under review.
Quality	● On track	User acceptance tests passed for sales and support workflows.

WORKSTREAMS	WORKSTREAM	PROGRESS	DONE	LEAD
	Configuration		100%	Aisha Khan
	Integrations		90%	Tomás Rivera
	Data migration		55%	Priya Shah
	Training		40%	Daniel Brooks
	Launch preparation		15%	Rebecca Tan

THIS PERIOD	Completed	Planned next
	✓ Finished all integrations with the billing and support systems ✓ Passed user acceptance testing for sales and support workflows ✓ Trained 34 users in the East and Central teams ✓ Removed 4,100 duplicate accounts from the legacy data	→ Clean up the remaining 2,300 duplicate accounts → Run the second test migration and reconcile the results → Train the West and Enterprise teams → Confirm the go-live checklist with IT

MILESTONES		
	September 18, 2026	● Configuration complete Done Completed on time
	October 9, 2026	● Integrations complete Done Completed one day late
	October 30, 2026	● Data migration sign-off At risk Depends on data cleanup
	November 20, 2026	● Training complete On track Four of six teams remaining
	December 11, 2026	● Go-live On track Holds if sign-off is met

BUDGET	All amounts are in USD.	
	Approved budget	480,000.00
	Spent to date	318,400.00
	Forecast at completion	492,000.00
	Variance	-12,000.00

RISKS

RISK OR ISSUE	IMPACT	OWNER	MITIGATION
Duplicate accounts delay data migration sign-off	High	Priya Shah	Added two analysts to the cleanup and agreed a daily progress check
Sales team availability for training in the last weeks of the quarter	Medium	Daniel Brooks	Offer evening and recorded sessions
Late change to the quoting integration	Low	Tomás Rivera	Hold until after launch unless approved by the steering group

DECISIONS

Needed from the steering group:

- ✓ Approve up to \$12,000 of extra budget for the data cleanup analysts
- ✓ Confirm whether the quoting change request can wait until after launch