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

- ✓ 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

Planned next

- → 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