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| **CLIENT:** | **SALVACIO BUILDERS** | **PROPOSAL BY:** | **LAURICE MORETTI** |

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| **Date:** | **Jul 12, 2030** |

**Overview**

# Executive Summary

Salacia Builders is seeking to implement a customer relationship management (CRM) system to address recent issues regarding poor customer engagement and retention. By implementing a CRM system, the company hopes to address these issues and improve overall customer satisfaction.

# Current Challenges

## Poor communication

Customer feedback indicates a lack of prompt communication from project managers is a major pain point during negotiations.

## Lack of centralized customer data

Manual lead tracking and a poorly optimized client database are causing a slowdown in contract approvals.



**CRM Business Case**

**Solutions and Beneﬁts**

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| --- | --- |
| **CRM Solutions** | **Benefits** |
| **Centralized customer database** | Stronger client relationships |
| Improved communication with clients |
| **Lead and bid management tools** | Faster contract approvals |
| Improved bid conversion rates |
| **Automated reminders and alerts** | Ensure timely follow-ups on bids, contracts, and payments. |
| Improved project tracking |

**Next Steps**

# Budget and Costing

Taking into account training and support, initial software expenses, and setup costs, our total proposed budget for implementing the Salacia Builders CRM system currently stands at $10,000. The chart provided below provides a more comprehensive breakdown of the total budget.

**Additional Expenses 10%**

**Employee Training 25%**

**Setup Costs 20%**

**Data Migration 15%**

**Initial Subscription Costs 30%**

**Timeline and Implementation**

|  |  |
| --- | --- |
| **Project Phase** | **Duration** |
| **Vendor selection and purchase** | Feb 1, 2030 to Feb 14, 2030 |
| **Initial setup and data migration** | Feb 15, 2030 to Mar 1, 2030 |
| **Employee training and workflow setup** | Mar 2, 2030 to Mar 18, 2030 |
| **Testing** | Mar 19, 2030 to Mar 31, 2030 |
| **Full deployment** | Apr 1, 2030 |

**Pexels, Pixabay,**

**Sketchify**

for the photos and elements



for the template

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