|  |  |  |  |
| --- | --- | --- | --- |
| **Project Code** | CRM010 | **Project Budget** | $6,900,000 |
| **Project Name** | CRM System Implementation | **Project Start Date** | July 5, 2023 |
| **Project Manager** | Mary Smith | **Project End Date** | February 20, 2024 |
| **Project Sponsor** | John Davis | **Status Date** | October 2, 2023 |
| **Project Description** | | | |
| The purpose of this project is to implement a new CRM system to replace the existing CRM system which is outdated and no longer meets the organization’s needs. The new CRM will be centralized and provides insights into customer behaviour which can be used to improve customer experience and increase sales. | | | |

**Summary**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Scope** |  | Significant changes in the scope have been requested by the Finance Stakeholder.  Some development deliverables were completed and now in testing. | | | | |
| **Schedule** |  | Unforeseen technical challenges have been encountered and the project schedule has been delayed. | | | | |
| **Budget** |  | Expenditures are tracking slightly above budget. This is due to unforeseen costs that have been incurred to address the unforeseen technical challenges as well as the cost to incorporate the scope changes mentioned above. | | | | |
|  | | **Approved Budget** | **Actual Spend** | **Future Spend** | **Expected Spend** | **Variance** |
| **Capital Expenses** | | $5,450,000 | $2,300,000 | $3,141,000 | $5,441,000 | $9,000 |
| **Operating Expenses** | | $1,450,000 | $350,000 | $1,100,000 | $1,450,000 | $0 |
| **Total** | | **$6,900,000** | **$2,650,000** | **$4,241,000** | **$6,891,000** | **$9,000** |

**Critical Issues / Risks**

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Type** | **Risk / Issue Description** | **Status** |
| 1 | Risk | The Website update project is delayed and as a result there could be a conflict with shared resources and environments. Tasks need to be reprioritized and changes made to the allocate resources differently. | Open |
| 2 | Issue | The development team encountered a critical bug in a critical component. The bug is preventing the application from functioning properly. This will delay the project by 2 weeks and potentially increase the budget. The team is working to fix the bug quickly. | Open |
| 3 |  |  |  |
| 4 |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Milestone Table** | | | **Planned** | | **Revised / Actual** | |
| **Name** | **Progress** | **Status** | **Start Date** | **Finish Date** | **Start Date** | **Finish Date** |
| Project Kick-off | 100% | Completed | 7/5/2023 | 7/5/2023 | 7/5/2023 | 7/5/2023 |
| Requirements Approval | 100% | Completed | 7/10/2023 | 7/28/2023 | 7/12/2023 | 8/15/2023 |
| Design Approval | 100% | Completed | 8/2/2023 | 8/25/23 | 8/2/2023 | 8/25/23 |
| Development**\*** | 85% | On Track | 8/28/2023 | 10/20/2023 | 8/28/2023 | 10/20/2023 |
| System Integration Testing**\*** | 25% | Delayed | 10/23/2023 | 11/17/2023 | 10/23/2023 | 11/19/2023 |
| User Acceptance Testing**\*\*** | 5% | At Risk | 11/20/2023 | 12/8/2023 |  |  |
| Deployment | 0% | Future Task | 12/11/2023 | 12/15/2023 |  |  |
| Go-Live | 0% | Future Task | 12/18/2023 | 12/18/2023 |  |  |
| Post Go-Live Support | 0% | Future Task | 12/19/2024 | 1/19/2024 |  |  |
| Project Closure | 0% | Future Task | 1/20/2024 | 2/20/2024 |  |  |