PROJECT PROPOSAL

Internal CRM Platform v2 — Build & Launch

PREPARED FOR	PREPARED BY	DATE
Logiroute Logistics	**Gridform Systems**	**March 14, 2026**

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Executive Summary

Logiroute has outgrown the patchwork of spreadsheets, the legacy Salesforce tenant from 2018, and the half-finished operations portal that the previous vendor left behind. This proposal scopes a 23-week engagement to design, build, and launch a single internal CRM platform that consolidates dispatch, sales pipeline, customer accounts, and contractor onboarding under one consistent product surface.

Gridform will own the full delivery — research, product design, engineering, QA, and a supervised go-live — for a fixed fee of $284,500. The plan below walks through how we understand the problem, the system we propose to build, the phasing of the work, the breakdown of cost, and the team that will sit alongside Logiroute throughout the engagement.

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Understanding the Problem

During our four discovery calls in February we heard the same story from dispatch, account managers, and the regional VPs: customer data lives in three different systems that do not agree with one another. The Salesforce tenant carries the contract record, the dispatch board owns the live shipment state, and a fleet of spreadsheets — owned by individual managers — track everything in between. The cost of this fragmentation shows up as duplicate data entry, missed renewal windows, and a six-day average lead time on new contractor onboarding.

Equally important is what the team is not asking for. Logiroute is not looking for a generic CRM rebrand or a low-code workflow tool; the operational vocabulary is too specific and the integration surface (TMS, fuel cards, ELD telematics, QuickBooks) is too deep for an off-the-shelf product. The platform we propose is a focused, opinionated internal product — built for Logiroute, owned by Logiroute, and lean enough to be maintained by a two-engineer team after handover.

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Proposed Solution

We propose a single-tenant web application built on a modern TypeScript stack (Next.js 15 on the frontend, a thin BFF layer, and a PostgreSQL-backed Go service for the operational write paths). The platform is structured around four canonical domains — Accounts, Pipeline, Dispatch, and Contractors — with a shared identity and audit substrate underneath. Every screen is reachable through a global command palette and is fully keyboard-navigable, mirroring the muscle memory the dispatch team already has from the legacy terminal.

Integration is treated as a first-class concern rather than an afterthought. The platform will expose a typed event log (NATS JetStream) and a stable read API, and we will ship turnkey connectors for the four systems Logiroute

depends on today: McLeod TMS for shipment state, WEX for fuel transactions, Geotab for telematics, and QuickBooks Online for invoicing. Each connector ships with its own reconciliation dashboard so that operations can see exactly where data is in flight and where it has settled.

Finally, the platform is designed to be handed back. We commit to a documentation-first delivery model: every domain ships with an architecture decision record, every API surface is versioned and documented in OpenAPI, and the final two weeks of the engagement are reserved for a structured handover to the internal Logiroute team. The capabilities below summarize what is included in the v2 release.

- Unified accounts and contacts model with full edit history and a per-record audit trail
- Sales pipeline with forecasting, renewal tracking, and territory-aware reporting
- Real-time dispatch board synchronized with McLeod TMS and Geotab telematics
- Contractor onboarding workflow — from application to compliant, dispatchable in under 48 hours
- Embedded analytics with role-based dashboards for ops, sales, and executive leadership

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Phases

PHASE	ACTIVITIES	DELIVERABLE	DURATION
Discovery	Stakeholder research, operator interviews, system audit of legacy CRM and integrations	Findings report	2 weeks
Design	Information architecture, wireframes, hi-fi prototypes, design system foundations	Hi-fi prototype + DS	4 weeks
Development	Platform build, integration connectors, instrumentation, internal preview releases	Working software	12 weeks
QA	User acceptance testing, performance load tests, security review and penetration test	Sign-off	3 weeks
Launch	Production deployment, operator training, internal comms, on-call rotation transfer	Go-live + handover	2 weeks

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Pricing

PHASE	COST	NOTES
Discovery	$22,000	Lead researcher + technical lead, 2 weeks on-site
Design	$54,000	Two designers, prototype validated against operator panel
Development	$148,500	Three engineers, four integration connectors included
QA	$28,000	External penetration test by Trail of Bits included

PHASE	COST	NOTES
Launch	$22,000	Two weeks of supervised production operation post go-live
Contingency reserve	$10,000	Released only against an approved change order
Total Engagement	**$284,500**	**Fixed fee, billed monthly against milestones**

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Team

Naomi Brandt

ENGAGEMENT LEAD

Twelve years running enterprise software programs, most recently the FreightOS dispatch overhaul. Naomi will be the single point of accountability for the engagement and your weekly steering contact.

Idris Okafor

PRINCIPAL ENGINEER

Idris owns the technical architecture. He has shipped two prior CRM platforms in the logistics space, including the carrier portal at Transfix that today processes 14M monthly events through the same NATS substrate proposed here.

Mei-Lin Hsu

LEAD PRODUCT DESIGNER

Mei-Lin leads design across the engagement, from research through the design system. Her recent work includes the operator console at Convoy and the dispatch redesign at Loadsmart, both shipped to production in 2024.

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Acceptance

By signing below, both parties accept the scope, schedule, and pricing described in this proposal. The agreement takes effect on the latest signature date and supersedes prior verbal commitments related to this engagement.

CLIENT

Hannah Reyes
Chief Operating Officer
Logiroute Logistics

DATE

VENDOR

Naomi Brandt
Engagement Lead
Gridform Systems

DATE