SoftwareGlimpse

CRM Business Case

Build the case. Get approval. Drive results.

Project / Initiative:	Prepared by:
Business owner:	Date:
Executive sponsor:	Target decision date:

THE DECISION

We are requesting approval to… (state the decision in one clear sentence, then add 2–4 supporting lines)

EXECUTIVE SUMMARY

CURRENT PROBLEM
e.g. siloed data, manual work, poor visibility — edit with your facts

RECOMMENDED OPTION
e.g. Implement / replace CRM (Option C) — after options analysis

INVESTMENT REQUIRED
Year 1 total from TCO sheet — do not invent

EXPECTED ANNUAL BENEFIT
From benefits model — label confidence

ESTIMATED PAYBACK
Months — only if cash flows are populated

DECISION REQUIRED BY
Target date for sponsor decision

Fill blanks with your organisation’s evidence. Leave unknown fields blank — never manufacture ROI or vendor uplift.

01 Why change?

BUSINESS PROBLEM

Describe the business problem in 2–4 sentences. Who is hurt, what fails, and why it matters now.

CURRENT PROCESS

How are leads, customers, opportunities and activities managed today?

CURRENT SYSTEMS

SYSTEM / TOOL	PURPOSE	USERS	ANNUAL COST	PRIMARY LIMITATION	ACTION

Action = Replace / Integrate / Retain. Leave cost blank if unknown.

CURRENT PAIN POINTS

PROBLEM	WHO AFFECTED?	FREQUENCY	BUSINESS IMPACT	EVIDENCE / SOURCE

Guidance only (do not treat as claims about your company):

Duplicate customer data · Manual sales reporting · Poor pipeline visibility · Missed follow-ups · Spreadsheet forecasting · Disconnected email/activity history · Low CRM adoption · Manual lead routing

02

What does the current state cost?

Separate directly measured values, estimates, and unquantified costs. Mark confidence on every row.

METRIC	CURRENT VALUE	SOURCE	CONFIDENCE
Salespeople			V / E / S / U
Average loaded hourly cost			V / E / S / U
Hours/week — manual admin			V / E / S / U
Hours/week — preparing reports			V / E / S / U
Leads / month			V / E / S / U
Lead response time			V / E / S / U
Conversion rate			V / E / S / U
Average deal value			V / E / S / U
Win rate			V / E / S / U
Sales cycle length			V / E / S / U
Forecast accuracy			V / E / S / U
CRM / tool costs (annual)			V / E / S / U
Duplicate software costs			V / E / S / U

CURRENT ANNUAL COST ESTIMATE

Manual administration cost ____________________

Reporting cost ____________________

Existing software cost ____________________

Lost productivity estimate ____________________

Other measurable cost ____________________

TOTAL ESTIMATED CURRENT ANNUAL COST ____________________

03 What does success look like?

OUTCOME	BASELINE	TARGET	MEASUREMENT	OWNER	DATE
Reduce manual CRM administration					
Improve lead response time					
Improve pipeline visibility					
Increase CRM adoption					
Improve forecast accuracy					
Reduce duplicate tools					
Improve activity capture					

NON-FINANCIAL BENEFITS

Rate strategic value: High / Medium / Low — prompts only, not claims.

BENEFIT AREA	NOTES (HOW IT MATTERS HERE)	STRATEGIC VALUE
Customer experience		H / M / L
Management visibility		H / M / L
Data quality		H / M / L
Process consistency		H / M / L
Compliance / governance		H / M / L
Employee experience		H / M / L
Scalability		H / M / L

04

What are our options?

Prevent “we want Vendor X” as the whole case. Compare do-nothing, improve-existing, CRM, and an alternative.

A · Do nothing
Status quo

B · Improve existing
Process / system

C · Implement CRM
Replace or expand
RECOMMENDED*

D · Alternative
Other architecture

**Mark recommended after analysis — Option C is a common path, not a default claim.*

CRITERION	OPTION A	OPTION B	OPTION C	OPTION D
Description				
One-time cost				
Annual cost				
Expected benefit				
Time to value				
Risk				
Strategic fit				

WHY THE RECOMMENDED OPTION?

Explain the choice using cost, benefit, risk, and strategic fit — not brand preference alone.

05 What will the CRM really cost?

YEAR 1 INVESTMENT (ONE-TIME + FIRST YEAR)

Software licences	?	
Required add-ons	?	
Implementation partner	?	
Internal implementation effort	?	
Data migration	?	
Integrations	?	
Training	?	
Change management	?	
Customisation	?	
Security / compliance work	?	
Contingency	?	

YEAR 2+ RECURRING ANNUAL COSTS

Licences	
Administration	
Integration / platform costs	
Other	
Add-ons	
Support	
Ongoing training	

YEAR 1 INVESTMENT	ANNUAL RECURRING	3-YEAR TCO
________	________	________

ASSUMPTIONS

Number of users: ________

Plan / tier: ________

Billing cycle: ________

Growth in seats: ________

Implementation duration: ________

Contingency %: ________

ASSUMPTION CONFIDENCE

VERIFIED Supported by known evidence

ESTIMATED Reasoned internal estimate

SCENARIO Hypothetical modelling assumption

UNKNOWN Still requires validatio

06 What value could the CRM create?

PRODUCTIVITY SAVINGS

Users × Hours saved / week × Loaded hourly cost × Working weeks = Annual productivity value

Label hours saved as SCENARIO unless verified by time study. Do not imply the CRM automatically creates this value.

INPUT	VALUE	CONFIDENCE	NOTES
Users			
Hours saved / week			
Loaded hourly cost			
Working weeks / year			

REVENUE IMPROVEMENT (SCENARIO ASSUMPTIONS)

LEVER	ASSUMPTION	EST. ANNUAL IMPACT	CONFIDENCE
Lead conversion improvement			SCENARIO
Win-rate improvement			SCENARIO
Sales-cycle improvement			SCENARIO
Recovered opportunities			SCENARIO

COST AVOIDANCE

Tools retired ______

Manual processes removed ______

External services reduced ______

Other savings ______

TOTAL ANNUAL MEASURABLE BENEFIT ______

+ Unquantified strategic benefits (list on outcomes page) — do not force into ROI.

07 Is the investment financially justified?

Populate from Excel model only when inputs exist. Never manufacture ROI.

YEAR 1 INVESTMENT	ANNUAL RECURRING	EST. ANNUAL BENEFIT	3-YEAR TCO
____________	____________	____________	____________

3-YEAR BENEFIT	NET 3-YEAR VALUE	PAYBACK (MONTHS)	ROI %
____________	____________	____________	____________

3-YEAR FINANCIAL SUMMARY

YEAR	COSTS	BENEFITS	NET CASH IMPACT	CUMULATIVE IMPACT
Year 1				
Year 2				
Year 3				

BREAK-EVEN TIMELINE (SKETCH WHEN VALUES EXIST)

Cumulative net (plot your cash flows)

Mark break-even where cumulative crosses zero — only after model is populated.

0 | 6 mo | 12 mo | 24 mo | 36 mo

ASSUMPTION CONFIDENCE

VERIFIED Supported by known evidence **ESTIMATED** Reasoned internal estimate **SCENARIO** Hypothetical modelling assumption **UNKNOWN** Still requires validation

08 What could prevent the benefits?

RISK	LIKELIHOOD	IMPACT	MITIGATION	OWNER
Poor user adoption				
Data migration problems				
Integration complexity				
Scope creep				
Implementation delays				
Underestimated administration				
Unexpected licence growth				
Weak process ownership				
Data-quality problems				

KEY DEPENDENCIES (PROMPTS — TICK WHEN SECURED)

- ☐ Executive sponsorship
- ☐ Process owners
- ☐ Data readiness
- ☐ Integration capacity
- ☐ Training capacity
- ☐ Procurement
- ☐ Security / privacy review

09

How will we realise the value?

Approval	Vendor / Contract	Design	Configuration	Migration	Training	Go-live	Adoption	Benefits review

MILESTONE	TARGET DATE	OWNER	SUCCESS GATE

VALUE REALISATION CHECKPOINTS

30-day
Early adoption & data hygiene signals

90-day
Process rituals running from CRM

6-month
Measurable ops / pipeline improvements

12-month
Benefits review vs business case

10 Recommendation

WE RECOMMEND

WHY

WHY NOW

WHY THIS OPTION

WHAT HAPPENS IF WE DO NOTHING

FINAL INVESTMENT SUMMARY

One-time / Year 1		Recurring annual	
3-year TCO		Expected measurable benefit (annual)	
Expected payback		Overall confidence	

11 Decision & assumptions

DECISION REQUESTED

Formal ask for the sponsor / finance / procurement.

DECISION

- ☐ **APPROVED**
- ☐ **APPROVED WITH CONDITIONS**
- ☐ **MORE INFORMATION REQUIRED**
- ☐ **NOT APPROVED**

CONDITIONS / COMMENTS

Executive sponsor: ____________________ Finance / procurement: ____________________

Decision date: ____________________

ASSUMPTIONS REGISTER

ID	ASSUMPTION	VALUE	TYPE	SOURCE	OWNER	CONF.	VALIDATE?

Type examples: cost, benefit, timing, volume. Confidence: Verified / Estimated / Scenario / Unknown.