



CRM Business Case: Template

Business goals and obstacles

Start by defining the strategic objectives your business wants to achieve and any obstacles or pain points, focusing on the areas where CRM technology can assist.

[EXAMPLE] *Goal: Our business wants to reduce customer churn and improve upsell/cross-sell opportunities for a 20% uplift in revenue. Challenge: Our sales and marketing teams don't share a single source of customer data, and our sales representatives often don't have the time or resources to focus on upselling.*

Customer relationship management (CRM) technology

Why we need a CRM

Explicitly match CRM benefits to specific business goals and challenges. You'll want to keep your points concise, but you also want to demonstrate precisely how the recommended CRM will help your company realise key goals.

[EXAMPLE] *Goal: We need to reduce customer churn and improve upsell/cross-sell opportunities for a 20% uplift in revenue. Benefit: A CRM would capture customer interactions in real time and create a single source of truth for Sales and Marketing, reducing double-up and generating more personalised upsell and cross-sell opportunities.*

CRM recommendations

Insert your recommendation for a specific platform or platforms, explaining 2-3 key reasons why this is the right tech stack, e.g. easier implementation with legacy systems. If you haven't yet determined which CRM you want to use, highlight a few major contenders and the top-line advantage of each.

The financial case

Highlight all expected ROI. Include data like lost revenue or time spent on manual sales processes. If that's unavailable, include industry benchmarks so that executives can see the more quantifiable benefits of your recommendation.

Outcomes

List specific outcomes the CRM project should achieve. This will help executives imagine a positive 'new world' enabled by a CRM, while also managing expectations around scope and expected results.

Costs, risks and challenges

Your business case shouldn't aim to sell a fantasy – instead, it should be honest about the risks and costs involved, while demonstrating they've been accounted for and are still eclipsed by the potential benefits.

[EXAMPLE] *Hard costs: hardware, software, customer database design, database maintenance and program management. Risks: low adoption rates after implementation and disagreements over data use or ownership. Solutions: investments in training and change management, as well as workshops to align teams on managing customer data.*

Next steps

Your business case should be actionable and time bound. Listing next steps helps executives understand what's required of them and what you need to move forward. This can also help communicate roles and responsibilities in the initial phases of your CRM strategy. Insert action points, dates to be completed and names of owners. If possible, provide a timeline that shows all stakeholders what they need to do and when.

[EXAMPLE] *Next steps: Head of Marketing and Head of Sales to provide feedback on proposed timeline by Tuesday, 10 August, COB*

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