

Business Case — CRM Rollout for the Sales Team

Business Case

Executive Summary

The company is a mid-sized trading company with 120 employees. Customer records are currently maintained in Excel and e-mail. Sales representatives cannot see complete communication histories, offers may be lost, and management does not have visibility of the sales pipeline.

The request is to introduce a CRM system for 25 sales representatives, with a stated budget of up to €60,000 and a target go-live within six months. These parameters are user-stated constraints, not evidence of an approved budget or committed delivery plan.

A decision-ready recommendation is not supportable at this stage because the options, objectives, scope, costs, benefits, risks, stakeholders, and delivery plan have not been provided. Further investigation is required before approval, rejection, or deferral can be substantiated.

Key decision conditions are:

- Confirm the business objectives and strategic alignment.
- Compare viable CRM and non-CRM options using consistent criteria.
- Validate the €60,000 budget against implementation, licensing, migration, training, integration, and ongoing operating costs.
- Confirm whether a six-month go-live is feasible.
- Define measurable benefits, owners, risks, and governance arrangements.
- Identify the authority responsible for the investment decision.

Background and Business Need

The current operating position, as stated in the request, is:

- Customer records are maintained in Excel and e-mail.
- Sales representatives cannot see the communication history.
- Offers may be lost.
- Management has no view of the sales pipeline.
- The affected sales population is stated to be 25 sales representatives within a company of 120 employees.

These conditions indicate a potential need to improve customer-record management, communication visibility, offer tracking, and pipeline reporting. The extent, frequency, financial effect, and operational severity of these issues are **TBD — current-performance data**,

examples, quantified impacts, and dated baseline evidence are required.

The proposed response is to introduce a CRM system. This is a proposed solution and should not be treated as proof that a CRM system is the preferred or only option.

The investment trigger, relevant strategic priorities, current processes, affected departments beyond the 25 sales representatives, and consequences of taking no action are **TBD — business-case evidence and stakeholder input are required.** A do-nothing baseline has not been supplied and is therefore not added as an evaluated option.

Objectives and Strategic Alignment

The intended objectives are **TBD — approved objectives and strategic priorities are required.**

The request suggests the following potential outcomes, which remain unapproved and require validation:

- Improve access to customer communication history.
- Reduce the risk of offers being lost.
- Provide management with visibility of the sales pipeline.
- Provide a common customer-record capability for 25 sales representatives.

The baseline, target values, measurement method, realization period, and accountable benefit owners for these potential outcomes are **TBD — approved objectives, measures, targets, and ownership are required.**

Strategic alignment cannot be confirmed from the supplied information. The relevant corporate strategy, commercial mandate, sales strategy, or management priority is **TBD — approved strategic or business alignment evidence is required.**

Options Considered

No alternatives or formal options have been supplied. The proposed CRM initiative is recorded below as a request, not as a recommended or approved option. A do-nothing option has not been added because it was not supplied or explicitly requested.

Option	Description	C	Benefit	Risk	Feasibility	Evidence
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Option	Description	Cost	Benefit	Risk	Feasibility	Evidence
CRM initiative described in request	Introduce a CRM system for 25 sales representatives. Detailed scope, operating model, product approach, integrations, migration, and delivery plan are TBD.	Up to €60,000.	Potentially improved communication-history visibility, offer tracking, and pipeline visibility; as benefits are unvalidated.	Implementation, adoption, data migration, integration, timing, and operating risks are TBD.	Six-month go-live stated as a target; feasibility is TBD.	Request brief only; option analysis and supporting estimates are required.
TBD	Additional viable option required for comparison.	TBD — option benefits — required.	TBD — option cost estimate required.	TBD — option risk assessment required.	TBD — deliverability assessment required.	Options analysis required.

A like-for-like comparison of cost, benefit, risk, deliverability, strategic fit, dependencies, and assumptions cannot be completed until the missing options input is provided.

Scope and Deliverables

The following boundaries are based only on the request and remain subject to confirmation.

Potentially included, subject to approval:

- A CRM capability for 25 sales representatives.
- Customer-record management.
- Visibility of communication history.
- Tracking or management of offers.
- Management visibility of the sales pipeline.
- Delivery within the stated six-month target.
- Delivery within the stated budget constraint of up to €60,000.

TBD — the following scope details require an approved scope definition:

- CRM product or deployment model.
- Data migration from Excel and e-mail.
- E-mail integration and any other system integrations.
- Reporting and dashboard requirements.
- User roles, permissions, and access controls.

- Data cleansing and ownership.
- Training, change management, and adoption support.
- Support and ongoing administration.
- Procurement requirements.
- Security, privacy, and retention requirements.
- Processes and departments included beyond the 25 sales representatives.
- Deliverables, acceptance criteria, and handover arrangements.
- Explicit exclusions and interfaces with existing systems.

The budget ceiling and six-month target could change the scope if licensing, implementation, migration, integration, training, or support requirements exceed available capacity or funding. Dependencies, change authority, and approval thresholds are **TBD — governance and authorization arrangements are required.**

Stakeholders

The following stakeholder groups are identified or implied by the request. Their formal roles, influence, and consent have not been evidenced.

- **Sales representatives:** 25 users identified as the intended CRM user group. Their process needs, availability, adoption requirements, and representatives for requirements validation are **TBD — stakeholder input is required.**
- **Management:** Affected by the lack of pipeline visibility and likely to use management reporting. The decision role, reporting requirements, and approval authority are **TBD — governance evidence is required.**
- **Business owner or sponsor:** **TBD — named sponsor and business owner are required.**
- **Investment or budget authority:** **TBD — authority responsible for approving expenditure up to or above €60,000 is required.**
- **Data and process owners:** **TBD — ownership of customer records, Excel files, e-mail information, data quality, and migration decisions is required.**
- **Delivery and technology groups:** **TBD — implementation, architecture, security, support, and procurement responsibilities are required.**
- **Customers and other affected parties:** Potentially affected by changes to customer-record and communication processes, but their impact is **TBD — process and stakeholder analysis is required.**
- **CRM supplier or implementation partner:** **TBD — sourcing approach and supplier involvement are required.**

Stakeholder interests in costs, benefits, risks, resources, and the recommendation cannot be fully assessed from the supplied information.

Costs and Resource Requirements

The request states a budget of up to €60,000. It does not provide a cost estimate, currency basis beyond the euro symbol, cost breakdown, timing, or confirmation that the amount is approved and inclusive of all relevant costs.

Cost Id	Category	Amount	Currency	Timing	Basis	Source
C-001	Overall budget constraint	Up to 60,000	EUR	TBD — timing and budget period required	User-stated maximum budget; not a validated estimate or approval	Request brief
C-002	CRM licensing or subscription	TBD — cost estimate required	TBD — currency confirmation required	TBD — implementation and recurring timing required	Supplier quote or validated estimate required	Missing cost input
C-003	Implementation and configuration	TBD — cost estimate required	TBD — currency confirmation required	TBD	Supplier quote or validated estimate required	Missing cost input
C-004	Data migration and cleansing	TBD — cost estimate required	TBD — currency confirmation required	TBD	Data-volume and migration assessment required	Missing cost input
C-005	Integration and reporting	TBD — cost estimate required	TBD — currency confirmation required	TBD	Requirements and technical assessment required	Missing cost input
C-006	Training and change support	TBD — cost estimate required	TBD — currency confirmation required	TBD	User and adoption assessment required	Missing cost input
C-007	Ongoing support and operations	TBD — recurring cost estimate required	TBD — currency confirmation required	TBD	Operating-model and supplier information required	Missing cost input

Required people, capabilities, technology, procurement support, implementation capacity, data ownership, and operating resources are **TBD — resource plan and availability information are required**. No affordability conclusion can be reached until one-time and recurring costs are

identified and compared with the €60,000 constraint.

Benefits and Value

The request identifies business problems and a desired CRM initiative, but it does not provide approved benefit definitions, baselines, targets, owners, or realization dates. The following records therefore represent potential benefits requiring validation, not committed outcomes.

Benefit Id	Benefit	Beneficiary	Measure	Timing	Owner	Evidence
B-001	Improved access to customer communication history	Sales representatives; other beneficiaries TBD	TBD — baseline, target, and measurement method required	TBD — realization period required	TBD — benefit owner required	Request states that sales representatives cannot see communication history
B-002	Reduced loss or misplacement of offers	Sales representatives; management; beneficiaries TBD	TBD — baseline, target, and measurement method required	TBD — realization period required	TBD — benefit owner required	Request states that offers get lost
B-003	Improved management visibility of the sales pipeline	Management	TBD — baseline, target, and reporting measure required	TBD — realization period required	TBD — benefit owner required	Request states that management has no view of the pipeline
B-004	Common CRM capability for 25 sales representatives	25 sales representatives; beneficiaries beyond this group TBD	TBD — adoption and usage measures required	TBD — realization period required	TBD — benefit owner required	Request specifies a CRM system for 25 sales representatives

The distinction between system outputs and realized business benefits, potential dependencies, and any risk of double counting are **TBD — benefits-management information and approved measures are required**. Financial benefits and benefit totals must not be calculated from the supplied information.

Risks and Mitigations

No formal risk assessment has been supplied. The table records uncertainties arising directly from the request and identifies where assessment is required. Likelihood and impact are not

assigned because no scoring scale or supporting evidence was provided.

R ID	Risk Event	Consequence	Likelihood	Impact	Response	Owner
R-001	Data migration or consolidation may be incomplete, unreliable, or lost. Customer information stored in Excel and e-mail addresses	Communication history, offers, or customer records may not be fully available in the CRM; benefit realization may be reduced	TBD — risk assessment required	TBD — impact assessment required	Define data sources, ownership, quality criteria, migration scope, and validation approach	TBD — risk owner required
R-002	The selected CRM may not support required processes and reporting processes not defined in the supplied information	Rework, low adoption, or inability to achieve intended outcomes	TBD — risk assessment required	TBD — impact assessment required	Complete requirements and process analysis before selection and approval	TBD — risk owner required
R-003	Total on-time and reduced costs may exceed stated constraint to €60,000	Scope reduction, delayed approval, or affordability failure	TBD — risk assessment required	TBD — impact assessment required	Produce a full cost model, including licensing, implementation, migration, integration, training, and support	TBD — risk owner required
R-004	Implementation may not be completed within six months	Delay to intended benefits and possible additional cost	TBD — risk assessment required	TBD — impact assessment required	Develop an indicative schedule, identify dependencies, and validate supplier and internal capacity	TBD — risk owner required

Risk ID	Risk Event	Consequence	Likelihood	Impact	Response	Owner
R-005	CRM Adoption, representing the change requirements are unknown	Data quality and pipeline visibility may remain inadequate	TBD — risk assessment required	TBD — impact assessment required	Define adoption measures, training, process ownership, and change activities	TBD — risk owner required
R-006	CRM initiative may proceed without controls and ownership responsibilities are not defined	Performance, delivery, operational, or compliance exposure may arise	TBD — risk assessment required	TBD — impact assessment required	Complete governance, security, privacy, support, and ownership assessments	TBD — risk owner required

Residual uncertainty remains material because options, requirements, cost estimates, benefit measures, owners, and delivery dependencies are missing.

Timeline and Next Steps

The request states a target go-live within six months. No start date, schedule, milestones, dependencies, or approval gates have been supplied. The six-month target is therefore an aspiration or constraint, not a delivery commitment.

Milestone	Target Date	Dependency	Decision Gate	Owner	Status
Confirm business need and objectives	TBD — planning date required	Stakeholder and business evidence	Confirm whether the case should proceed to option analysis	TBD — owner required	Not evidenced
Define requirements and scope	TBD — planning date required	Business-process and user input	Approve scope baseline for option comparison	TBD — owner required	Not evidenced
Assess and compare options	TBD — planning date required	Options, cost estimates, benefits, and risks	Select preferred option or investigate further	TBD — decision authority required	Not evidenced

Milestone	Target Date	Dependency	Decision Gate	Owner	Status
Validate budget and resource requirements	TBD — planning date required	Supplier estimates and internal resource plan	Confirm affordability against up to €60,000 constraint	TBD — owner required	Not evidenced
Confirm delivery plan and six-month feasibility	TBD — planning date required	Selected option, dependencies, capacity, and schedule	Approve delivery approach	TBD — decision authority required	Not evidenced
CRM implementation and preparation	TBD — planning date required	Approval, procurement, configuration, migration, and training	TBD — approval gate required	TBD — owner required	Not evidenced
Go-live decision	Within six months stated in request; exact date TBD	Readiness, data, training, support, and acceptance criteria	Go-live approval	TBD — decision authority required	Not evidenced
Benefits review	TBD — realization date required	Approved measures, baseline, targets, and benefit owner	Confirm benefits realization	TBD — benefit owner required	Not evidenced

The immediate next step is to complete the evidence required for business need, objectives, options, scope, costs, benefits, risks, stakeholders, and delivery feasibility. These activities are necessary for a PRINCE2-style decision point and should not be treated as approval to commence implementation.

Recommendation

No final investment recommendation is supportable from the supplied evidence.

The request establishes a credible business problem and a proposed CRM direction for 25 sales representatives, with a stated budget constraint of up to €60,000 and a target go-live within six months. It does not establish that the CRM option is affordable, feasible, strategically aligned, or superior to alternatives.

The expected decision at this stage is **investigate further**, subject to confirmation by the **TBD — decision authority must be identified**. Further investigation should produce:

- Approved objectives and strategic alignment.
- A defined baseline and measurable benefit targets.

- At least one additional viable option or a documented rationale for limiting the options.
- A defined scope and delivery approach.
- One-time and recurring cost estimates.
- Resource, supplier, migration, integration, training, and support requirements.
- A risk assessment with owners and responses.
- A validated schedule demonstrating whether the six-month target is achievable.
- Governance, approval, and change-control arrangements.

Approval of implementation should be considered only after these gaps are resolved and the preferred option is shown to fit the budget constraint, deliver the intended value, and remain feasible within the required timeframe.