

CRM Business Case

9 essential parts of a great CRM Business Case

1. CRM OBJECTIVES

Determine the objectives of the CRM project, according to the current business processes (AS IS) and the desired new way of working (TO BE).



6. KPI'S

Determine a set of KPIs, criteria to measure the success of your CRM project.



2. NEEDS AND EXPECTATIONS

Map out the needs and expectations of CRM. Why do you want to implement CRM and what do you want to achieve with it?

7. CRM GOVERNANCE

Define the outlines of how the further evolution and maintenance of your CRM application will take place. Be clear about project ownership, roles and responsibilities.



3. KEY STAKEHOLDERS

Identify the Key Stakeholders and Key Persons to run the CRM project.



8. RISKS AND ACTIONS

Identify potential risks, the impact and actions to prevent risks. Determine mitigation measures and their costs.



4. SUCCESS FACTORS

What are the critical success factors ... what is essential to make this project a success?

9. ROI

Determine the ROI (return on investment). What do you expect your investment in CRM will yield?



5. CRM TECHNOLOGY

Identify the right CRM technology and qualify the benefits.



More info?
Contact us!

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