## 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.

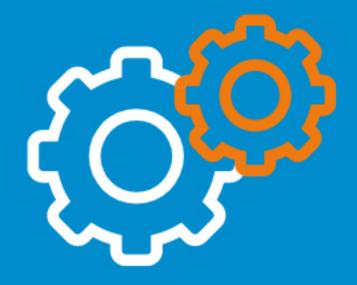


# 2. NEEDS AND EXPECTATIONS

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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