

How to Build a No-Bull Business Case for a Better CRM





INTRODUCTION

Why You Need a Business Case

At some point in its life, every tool needs an upgrade.

Maybe your business has grown so much that the tool lacks the capacity and capability required. Perhaps it no longer aligns with the latest compliance and regulations. It could simply have just fallen behind the times and need a bit of TLC.

CRM is no exception. As an integral tool for business, poor CRM means poor efficiency, lower productivity, data inaccuracy and customer dissatisfaction. The CRM market is also constantly evolving, so it doesn't take long for software to become obsolete.

The solution sounds simple, right? Get an upgrade.

However, this proposal is likely to be met with plenty of understandable objections.

For starters, CRM software isn't cheap. Constant innovation and enhancement with shiny new features have driven the prices of many solutions through the roof.

To upgrade your software, you'll need buy-in at a board level, and in the economic uncertainty we find ourselves in, that's a hard thing to come by.

Then there's the issue of change. People may be unwilling to part with their existing systems – tools they're already comfortable with – for a replacement full of complexity. Even if they do come around, they may have their own ideas of what features are essential – ideas that contradict what you'll hear from other stakeholders.

If your business needs to improve its CRM, you need a rock-solid business case – one that identifies and addresses the concerns of stakeholders, details the key features you actually need, and justifies the investment with concrete evidence of the ROI it can bring.

In this guide, we'll help you do just that.



Understanding Stakeholder Priorities

If you've embarked on a mission to update or replace your CRM, you'll know that it's no small task.

For many businesses, improving CRM software is part of a wider digital transformation journey. Like any other initiative of its kind, changes to CRM will have a significant impact throughout your organization, with key stakeholders spread across multiple departments.

Each of these departments will have different (and often competing) priorities. For instance, what might work well for your Sales teams could be a headache for Marketing, and what Marketing deems essential could be viewed as an unnecessary expense by Finance.

Mapping these different priorities is an invaluable exercise. Not only will it help you identify the solution that meets the needs of the wider organization, but it will also engage stakeholders in the decision-making process.

If you can speak in terms different parties understand and care about, you'll have a far better chance of securing their buy-in. This isn't about deception – it's about genuinely taking an interest in their wants, needs and fears, and delivering a solution that addresses them.

To help you on your way, we've designed a worksheet for you to map the perspectives of your key stakeholders and departments.

In each of the four columns, fill in the following information:

- **Key requirements:** What do they want to see from the investment? e.g. Finance wants to see cost savings.
- **How CRM addresses these:** How could a CRM solution deliver this? e.g. Reducing time spent on manual processes.
- **Potential objections:** What potential objections will they have? e.g. Sales fear a new CRM will be too complex.
- **Solutions:** How can the right CRM address these fears? e.g. User-friendly interface and integration.

Tip: Speak to each of the different parties directly. Instead of trying to guess what their biggest concerns will be, getting their accounts and views will ensure they're invested in the process. It's also likely that these departments will have insight into factors you haven't considered.



KEY STAKEHOLDERS AND DEPARTMENT PERSPECTIVES

We’ve filled in some examples to get you started:

Department	Key requirements	How CRM addresses these	Potential objections	Solutions
Finance	Compliance	Comprehensive compliance and data security	High initial cost	Flexible solution – no capped functionality
Sales	Pipeline visibility	Centralized data	Data entry	Automation
Marketing	Data integrity	Automated data entry and validation	Learning curve	Simple user interface
Customer Service	Access to customer information	Detailed customer profiles and data validation	Impact on service quality	Simple and free training + workshops





The “Must-Have” CRM Feature Checklist

Once you’ve engaged your key stakeholders and departments, the next step is to determine which CRM features you actually need.

This is the crucial stage where you need to be firm and honest with yourself. Which functions are essential for your organization specifically? With the requirements you’ve gathered from other stakeholders in the previous exercise, what features do these teams need most? And crucially, what can your organization afford?

Too many organizations today find themselves spending exorbitant fees on CRM features they won’t ever use. We call this ‘CRM bullsh*t’ – the unclear pricing, capped functionality, and aggressive sales tactics that lead to mid-market businesses paying enterprise-level prices for their CRM.

The worst thing about this is that the added complexity of these features and enhancements doesn’t necessarily correlate with value. In fact, they can reduce productivity, increase frustration and stop teams from wanting to use the tool altogether.

So how can you remove the bloat and focus on the functionality that matters?

In project management, the Agile methodology uses a prioritization technique called the **MoSCoW** framework. It divides requirements into four categories, based on their importance:

- **Must Have:** Initiatives you 100% need to have in your product.
- **Should Have:** Features that are essential but not vital.
- **Could Have:** ‘Nice to have’ initiatives that aren’t strictly necessary.
- **Won’t Have:** Features that are in no way a priority.

For software developers, this is a helpful way to identify key priorities – and it can be applied to purchase decisions, too. When assessing CRM solutions, this method can help you hone in on the specific functionality your business needs.



We've adapted the MoSCoW framework into an easy-to-use checklist. There are a few popular features already listed as examples, but there's also space to add additional ones you may have heard about or been offered by CRM providers. Against each of these, simply categorise them as either **Must Have**, **Should Have**, **Could Have**, or **Won't Have**.

It's worth engaging other stakeholders in this process. When you're documenting their requirements and concerns, this checklist can be another way to gather their insights, strengthen relationships and establish trust between departments.

Tip: Don't forget to consider the size and trajectory of your organization, too. It's tempting to imagine where you could be (and the capabilities you'll need) in several years, but for now, those extravagant features will only add to your monthly invoice.

Features	Must Have	Should Have	Could Have	Won't Have	Notes
Contact Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sales Pipeline Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Automation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reporting & Analytics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Task Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mobile Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Collaboration Tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	





Financial Justification: Proving ROI

Now comes the big hurdle: ROI.

Your growing business case might be looking positive. You could have Sales and Marketing – teams that were previously at odds with one another – on your side. You may even have support from Finance. But the bottom line in any organization is ROI and financial justification, and if you can't prove this with concrete evidence, your plans won't go anywhere.

The challenge is that calculating the ROI of your CRM isn't straightforward – if it was, some of the biggest providers in the

market wouldn't have to sell their solutions so aggressively.

CRM can of course benefit an organization, but putting that impact into numbers requires some analysis. Those benefits also aren't guaranteed, which makes having that clear ROI more important.

There's a lot to consider in this process, but don't panic – we've outlined each of the steps you need to take below:

STEP 1: IDENTIFY THE COSTS

The first thing you need to do is calculate the cost of onboarding a new CRM solution – everything from the price of the initial purchase to maintenance fees and hidden, indirect expenses resulting from the transition.

We've grouped these expenses into three broad categories – **Initial**, **Ongoing** and **Indirect**.

Initial	Ongoing	Indirect
Software purchase	Subscription fees (e.g. user accounts)	Implementation
Setup and onboarding	Training	Change management
Customization	Updates and upgrades	Downtime
Training	Support	Data migration
Add-on features	Maintenance	Time spent training
Data migration and tech support	Data storage	Time spent adapting to workflows

It's important to be as pragmatic and honest in your assessment as possible at this stage. If you want to win over your CFO and the rest of the board, you'll need to have covered all the bases in as much detail as possible and have left no stone unturned.



STEP 2: MEASURE THE BENEFITS

This is where you have the chance to win people over: the benefits.

Providing a clear picture of the tangible benefits your CRM can offer the organization. Measuring this in as much and as accurate and realistic detail as possible will give you the most compelling business case.

Tip: To give you the best chance of delivering accurate figures, get your existing numbers for areas like lead conversion rates and customer retention rates, as well as time spent on manual processes. Then use these as a baseline to measure improvement.

Revenue growth

How can a better CRM improve revenue growth? Ask yourself these questions and determine:

- How would your lead conversion rate improve with better tracking, segmentation and follow-up processes?
- What would happen to your customer retention rate with better personalization and faster, more efficient customer service?
- Would a better CRM increase successful upselling and cross-selling of different services/products?

Efficiency gains

Could a simpler, more efficient CRM save your teams valuable time? Consider:

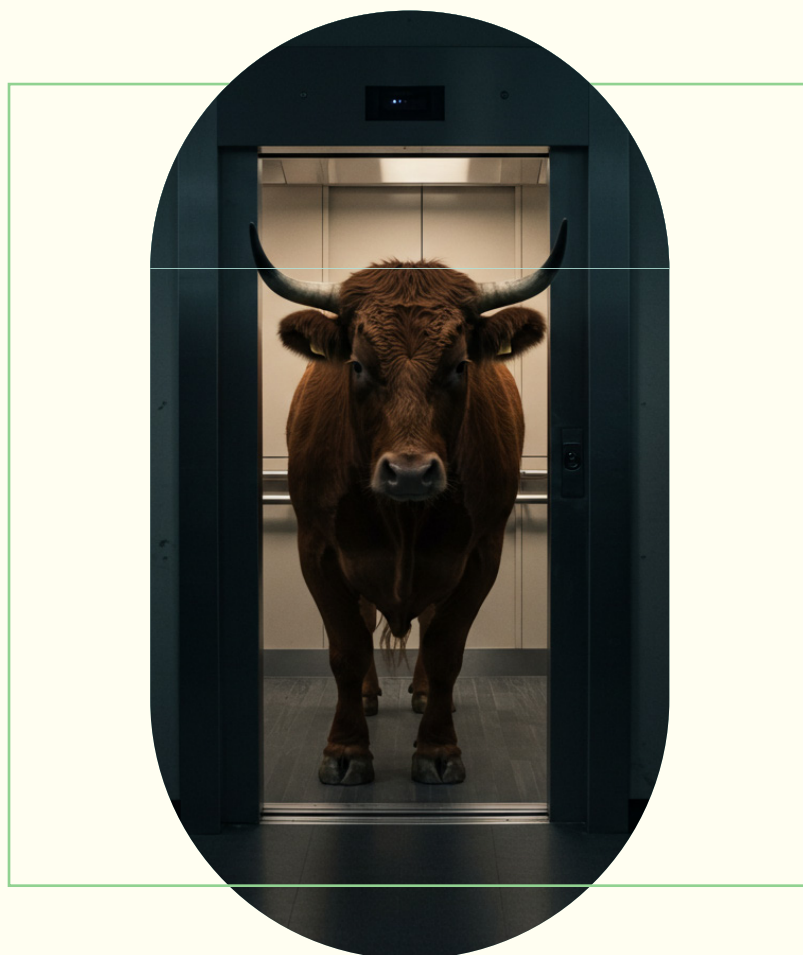
- Would a new CRM streamline processes, reduce the risk of manual errors, and deliver efficiency gains?
- How much time would your Sales teams save from a more efficient system, and would their time-to-close be reduced?

Putting this into a monetary value can be achieved by multiplying the number of hours saved by each employee's hourly rate.

Cost savings

To get Finance on side, consider what tangible cost savings a new CRM could bring you:

- What would you stand to save from better resource allocation?
- What financial impact would reducing customer churn have on your business?
- How much are your existing CRM's shortcomings costing you?





STEP 3: CALCULATE THE ROI

Once you have all of the above numbers, you can use this simple formula to calculate your ROI: **Net profit / total investment * 100**

In this formula, net profit needs to account for:

- **Impact on revenue growth**
- **Potential efficiency gains**
- **Operational cost savings**

Similarly, the total investment figure should include:

- **Purchase and subscription fees**
- **Consultation fees**
- **Training expenses**
- **Implementation expenses**
- **Customization fees**
- **Additional expenses (e.g. licences)**

STEP 4: FRAME THE CONVERSATION IN CFO-FRIENDLY TERMS

All of these findings need to be presented in terms your CFO and Finance department can understand. This means they need to be based on hard numbers, with an emphasis on efficiency and cost savings. Where possible, **tie every point, finding and insight to revenue**.

Another thing to factor into both your ROI calculation and any conversations with Finance is how your existing CRM software could be costing you money.

While there's undoubtedly going to be some hesitation to commit money towards upgrading CRM if your existing system is already struggling, an underperforming solution can have just as much of a financial impact – but over an extended period. Making Finance aware of these expenses will help them understand the benefits of a better solution.

Some of these hidden costs they may not be aware of include:

- **Loss of productivity:** CRM slowed down by bugs and errors will leave employees frustrated. They may have to turn to manual processes, and you'll lose valuable productivity while they struggle with these systems.
- **Maintenance costs:** A poorly functioning CRM will require frequent updates and troubleshooting, which can take up valuable time for your IT teams or even mean spending on external consultants to address issues.
- **Missed sales opportunities:** Issues with CRM can result in Sales teams missing out on opportunities to capture leads. This will have a direct impact on your organization's revenue.
- **Compliance risks:** If your existing CRM isn't compliant with the latest data protection regulations, you'll be at risk of hefty fines and legal costs.
- **Data inaccuracy:** Having clean data in your CRM is crucial. Keeping it this way is harder for older systems. If you're reliant on data for decision making, this inaccuracy can lead to some costly mistakes.

Tip: Just as you can forecast the potential ROI of new CRM software, you can use the same method to calculate how much your existing CRM is costing you, too. For instance, you can reverse your calculations for efficiency gains and time-to-close by understanding how much time Sales are losing on slow, clunky and complex CRM systems.



Making the Pitch: Selling the Change Internally

Finally, it's time to make the pitch.

With all of the information gathered from the previous steps in this guide, you should have a healthy body of evidence to justify investment in new CRM software.

However, it's not over yet. All of this information needs to be crafted into a compelling narrative – one that

simultaneously identifies and addresses the concerns of senior leadership and offers a compelling solution.

In the following pages, we've given you all the tools and tips you need to make this pitch a success.

CREATING A COMPELLING NARRATIVE FOR A BETTER CRM

There are several simple steps you can take to produce a pitch that resonates with the board:

1. Start with the problem

This is where you set the scene. You'll want a hook here – what are some of the most shocking findings from your research and the work you've conducted in previous activities?

For instance, do you have a statistic illustrating just how much your existing CRM is impacting customer retention? How many members of the Sales team have indicated they're unhappy and unwilling to use the software? Better still, do you have any concrete evidence that this is losing the company revenue?

Tip: Remember your audience. Avoid throwing accusations at this point, and try to focus on facts and findings they can all relate to.





2. Dig into the background

Once you've got them hooked, it's time to dig deeper. This is where you paint the picture and emphasise the need for change before offering a solution.

Use more of your data and calculations here to double down on the issues you're trying to convey. How much of a negative impact is your current CRM having on operations? What have you heard from Marketing about how frustrating your existing tool's features are?

What requirements have you captured from stakeholders that the current solution simply isn't delivering?

To make this a compelling narrative, deliver these facts and figures in the context of your business. Talk in terms of your organization and your teams and align it with your company's goals. For instance, if there are plans to enter new markets or launch new products, could these CRM issues have a significant impact?

3. Offer the solution

Now it's time to propose the change.

You'll need to be as clear here as possible. They'll likely be already aware of what you're proposing, but unless you've heard a unanimous chorus of cheering, yeses and clapping, there's still work to do.

When you detail the benefits of a new CRM, make sure you:

- Address each of the issues and failings of your existing CRM (and their consequences) that you highlighted previously
- Explain exactly and directly how a better CRM can address these
- Incorporate the concerns you gathered from your previous stakeholder research exercise

4. Leave room for questions

There are undoubtedly going to be some concerns. There will be probably be questions you may not have anticipated, too. But that's fine – these stakeholders wouldn't be trusted in their roles if they didn't have the questions and perspectives others didn't think of.

With the research you've conducted in previous exercises, you should be well prepared to answer and address the concerns stakeholders will have about this investment.





ADDRESSING POTENTIAL OBJECTIONS IN THE BOARDROOM

As well as a narrative for your pitch, you'll also need to have your evidence to hand during your pitch to help you address potential objections.

To get you started, we've created a worksheet to help you respond to any concerns. Use the left column to list concerns and answer them with your evidence in the right.

Tip: Be sure to acknowledge the validity of each objection in your responses. This will take your answers one step further, displaying empathy and also illustrating that you have considered this proposal in detail from the perspectives of others.

Some of the following phrases could be useful to guide your responses:

- “These concerns are absolutely valid.”
- “Your feedback is very valuable.”
- “If there’s anything unclear, let’s discuss it further to find a solution.”
- “This is an open discussion, and I want to hear your perspective.”
- “This process needs to be smooth and it has to work for everyone.”

Potential Objections	Solution
Implementation pain	Development and deployment can be a long process — to mitigate this, we will provide a clear, structured implementation roadmap, with a focus on long-term benefits.
Cost concerns	The CRM will be expensive at first. However, it can reduce operational costs through automation, leading to long-term savings. Improvements in conversion and retention rates will also lead to revenue over time.
Poor adoption	We want everyone to get maximum value from CRM, so we will involve them early on and throughout the process to ensure it meets their needs. Ease of use and reduced complexity will also be priorities.





PROPOSING THE CHANGE

Before any of these conversations can happen at a board level, you'll need to call the meeting. This is where you initially propose the change.

As the first step, this can understandably be daunting, but if you've engaged your key stakeholders and understood their perspectives beforehand, it won't come as a surprise to them.

Instead, view it as an opportunity to showcase all of your hard work, and deliver a solution that specifically addresses their requirements and concerns.

Below we've put together a sample email. Simply edit the sections in brackets to match your organization's specific goals or targets:

Hello [NAME],

I hope this email finds you well.

You'll be aware that I have been reviewing our software and processes in an effort to [align with business goals, e.g. improve efficiency and drive growth]. As part of my evaluation, I would like to propose that we review our existing CRM software.

Based on my findings, I believe there are significant opportunities to [align with business goals, e.g. reduce manual processes, increase user adoption, streamline operations] by onboarding a new solution. These improvements could impact key metrics, such as [align with reporting metrics and goals, e.g. improving lead conversion rates, boosting customer retention, reducing time-to-close].

I would like to request a meeting to discuss this further, present my findings to you, address any potential concerns, and outline the benefits a new solution could offer.

Would [day/week/time] be suitable for us to discuss this? I am happy to adjust to a time that fits your schedule.

Many thanks,

[Your name/signature]



Conclusion

Changing a core business tool like CRM isn't easy – nor should it be.

It's a significant investment for any business, and as such, finding the right solution needs to be a detailed process that engages various different stakeholders throughout the organization. Ultimately, the solution that gets picked needs to fit the business as much as possible.

However, with so much bullsh*t out there and so many brands saddled with costs for functionality they simply don't need, we expect many more organizations to find themselves in this difficult position over the coming years.

At Workbooks, we see CRM differently.

Unlike some of the biggest brands dominating the market, we won't try to sell a mid-size business an enterprise-grade solution.

With flexible pricing options, a focus on user experience and a zero-tolerance stance on BS sales tactics, we're more concerned with our customers than we are hitting sales numbers. Our affordable packages also have features that are free of the capped functionality of other CRM vendors, meaning you won't find yourself writing more cheques to access the tools your business needs.

All of this is why we're [ranked #2 in the list of top CRM providers of 2025](#) (and proud of it).

If you're keen to make the switch and are comparing different CRM options, get in touch with us to learn how we can help you upgrade your CRM to one that will support your business, not hold it back.





Workbooks is a SaaS platform used by growing companies to run their business and engage effectively with their customers.

Workbooks core CRM services extend beyond sales, marketing and customer services to include powerful marketing automation, event management, order management and fulfilment, invoicing and supplier management functionalities.