# CRM PROJECT SCOPE

| VERSION HISTORY | | | | |
|---|---|---|---|---|
| **VERSION** | **APPROVED BY** | **REVISION DATE** | **DESCRIPTION OF CHANGE** | **AUTHOR** |
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| **PREPARED BY** | | **TITLE** | | **DATE** | |
|---|---|---|---|---|---|
| **APPROVED BY** | | **TITLE** | | **DATE** | |

# TABLE OF CONTENTS

# 1. EXECUTIVE SUMMARY

Upon completion of the other Project Scope sections, summarize each section to a succinct collection of statements and conclusions with a clear call to action to form the Executive Summary.

## 2. CRM STRATEGIC ASSESSMENT

### 2.1    MARKET DYNAMICS

### 2.2    ORGANIZATIONAL DYNAMICS

## 3. OPPORTUNITY ASSESSMENT

Detail opportunities available to realize a ROI.  Categories to discuss may include: Customer Interaction Complexity, Organizational Effectiveness, Persona-Based Offerings, Competitive Differentiation, Messaging and Positioning, Demand Generation, Sales Process, Customer Acquisition and Lead Generation, Customer Retention, and CRM Database Management.

## 4. RISK MITIGATION

| RISK CATEGORY | PROBABILITY | RISK | MITIGATION STRATEGY |
|---|---|---|---|
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
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# 5. PROJECT RECOMMENDATIONS

## 5.1 BENEFITS AND RISKS

## 5.2 ESTIMATED PROJECT COSTS

## 5.3 APPROVAL PROCESSES

## 5.4 REVIEW PROCESS AND SCHEDULING

## 5.5 RECOMMENDATIONS

| DOMAIN | OPPORTUNITY | TOOLS | DESCRIPTION |
|--------|-------------|-------|-------------|
|        |             |       |             |
|        |             |       |             |
|        |             |       |             |
|        |             |       |             |

# 6. FINANCIAL OVERVIEW

## 6.1 CRM SUITES

| CRM SUITES | TOTAL | YEAR 1 | YEAR 2 | YEAR 3 |
|---|---|---|---|---|
| HARDWARE | | | | |
| SOFTWARE LICENSING | | | | |
| THIRD PARTY SOFTWARE | | | | |
| APPLICATION LICENSING | | | | |
| DOCUMENTATION & TRAINING | | | | |
| MAINTENANCE | | | | |
| INSTALLATION | | | | |
| INTEGRATION | | | | |
| LEGACY DATA LOADING | | | | |
| PROJECT MANAGEMENT | | | | |
| APPLICATION STAFFING | | | | |
| MISCELLANEOUS | | | | |
| | | | | |
| TOTAL | | | | |

## 6.1 POINT SOLUTIONS

| POINT SOLUTIONS | TOTAL | YEAR 1 | YEAR 2 | YEAR 3 |
|---|---|---|---|---|
| HARDWARE | | | | |
| SOFTWARE LICENSING | | | | |
| THIRD PARTY SOFTWARE | | | | |
| APPLICATION LICENSING | | | | |
| DOCUMENTATION & TRAINING | | | | |
| MAINTENANCE | | | | |
| INSTALLATION | | | | |
| INTEGRATION | | | | |
| LEGACY DATA LOADING | | | | |
| PROJECT MANAGEMENT | | | | |
| APPLICATION STAFFING | | | | |
| MISCELLANEOUS | | | | |
| | | | | |
| TOTAL | | | | |

## 7. ROLES AND RESPONSIBILITIES

| ROLE | OWNER | ADDITIONAL CONTRIBUTORS |
|---|---|---|
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## 8. ATTACHMENTS

| ATTACHMENT NAME | LOCATION / LINK |
|---|---|
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# 9. APPROVAL

_____

*Project Approver Name and Title  (Printed)*

_____

*Project Approver Signature*                                                    *Date*

_____

*Project Sponsor / Lead Name and Title (Printed)*

_____

*Project Sponsor / Lead Signature*                                          *Date*

_____

*Project Manager Name  (Printed)*

_____

*Project Manager Signature*                                                  *Date*

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