Business case data entry is at the Project Level (Green Bars), click on the bar ID, bottom left, click on Form button, scroll down to Business Case section and enter data in the fields as needed per your organization. If you wish to hide some of the fields to your users, configure entries in the Core Report spreadsheet tab per instructions in the Spreadsheet. You can paste directly into the fields as formatted data. Data is save when you leave a field. To view and print the Business Case, launch the Cards view on the PPM Page or the Portfolio Reports Menu.

Sample Business Case: CRM System Cloud Migration

The following example was generated by Grok.

Metadata

Attribute	Value	Attribute	Value	Attribute	Value
Status	New	Sponsor	Jim Cox	Primary Line of Business	IT Department
Workflow State	Awaiting Approval	PMI Phase	Initiating	Business Owner	Jim Cox
Stage	Prioritized	Business Advisor	Joe Blow	Sponsoring Department	Sales
Investment Portfolio	xxx	Type of Initiative	Project	Primary Contact	null
Contact Info	xxx				

Project Name/Title

CloudSync CRM Migration

Background Information

The organization currently relies on an on-premises CRM system (LegacyCRM v5.2) that is over a decade old. The system struggles with frequent downtime, slow performance, and limited scalability, impacting sales team productivity. Maintenance costs have risen by 15% annually, totaling $120,000 in 2024. A cloud-based CRM solution offers scalability, enhanced security, and integration with modern tools like mobile apps and AI analytics.

Stakeholders

Name	Role	Department	Contact Info
Jim Cox	Sponsor/Business Owner	Sales	jim.cox@company.com
Joe Blow	Business Advisor	IT	joe.blow@company.com
Sarah Lee	IT Project Manager	IT	sarah.lee@company.com
Sales Team	End Users	Sales	sales.team@company.com
Finance Department	Budget Approver	Finance	finance@company.com

Problem/Opportunity

The current on-premises CRM system cannot support the organization’s growth, with a 20% increase in customer data annually. It lacks real-time analytics, mobile access, and integration with marketing platforms, leading to missed sales opportunities estimated at $200,000 annually. Migrating to a cloud-based CRM (e.g., Salesforce or HubSpot) provides scalability, real-time insights, and improved user experience.

Consequence of Inaction

- **Financial Impact**: Continued maintenance costs of $120,000/year and lost revenue of $200,000/year due to inefficiencies.
- **Operational Impact**: Increased system downtime (currently 10 hours/month) disrupts sales workflows.
- **Competitive Risk**: Competitors using modern CRMs gain market share through faster customer response times.

Objectives and Scope

Objectives

- Migrate the CRM system to a cloud platform by Q4 2025.
- Reduce system downtime to under 1 hour/month.
- Enable mobile access and real-time analytics for the sales team.
- Achieve 20% improvement in sales team productivity within 6 months post-migration.

Scope

- **Inclusions**: Data migration, cloud CRM setup, user training, and integration with email and marketing tools.
- **Exclusions**: Hardware upgrades for on-premises servers, custom feature development beyond standard CRM capabilities.

Expected Benefits

- **Financial**: $150,000/year savings from reduced maintenance and $250,000/year in additional revenue from improved sales efficiency.
- **Operational**: 90% reduction in downtime and 20% faster data access.

- **Strategic**: Enhanced customer insights through AI analytics, supporting 25% faster decision-making.

Capabilities Needed

- Cloud infrastructure (e.g., AWS or Azure).
- CRM platform expertise (e.g., Salesforce-certified administrators).
- Data migration tools (e.g., Informatica or Talend).
- Training program for 50+ sales staff on cloud CRM usage.

Senior Level Commitment

- **Sponsor**: Jim Cox (VP of Sales) will champion the project, securing budget and aligning with strategic goals.
- **IT Director**: Maria Gomez will oversee technical implementation and resource allocation.

Constraints & Assumptions

Constraints

- Budget capped at $300,000 for migration and first-year licensing.
- Project completion required by Q4 2025 to align with sales cycle.

Assumptions

- Existing data can be migrated without significant cleansing (80% clean).
- Staff training will be completed within 2 months post-migration.

Cost Benefit Analysis

Item	Cost	Benefit	Value
Cloud CRM Licensing (Year 1)	$100,000	Maintenance Cost Savings	$150,000/year
Data Migration & Setup	$150,000	Increased Revenue	$250,000/year
Training Program	$50,000	Productivity Gains	$100,000/year
Total	**$300,000**	**Total (Year 1)**	**$500,000**

ROI: 66.7% in Year 1 ($500,000 benefits - $300,000 costs / $300,000).

Risk Assessment

Risk	Likelihood	Impact	Mitigation
Data migration errors	Medium	High	Conduct pre-migration testing and backups.
Staff resistance to new system	High	Medium	Implement change management and training.
Budget overrun	Low	High	Lock in vendor contracts early.

Timeline and Milestones

Milestone	Date
Vendor Selection	Q2 2025
Data Migration Completion	Q3 2025
System Testing	Q3 2025
User Training	Q4 2025
Go-Live	Q4 2025

Resource Requirements

- **Personnel**: 1 Project Manager, 2 CRM Developers, 1 Data Analyst, 1 Trainer (6-month contracts).
- **Tools**: Cloud CRM subscription, migration software, training materials.
- **Budget**: $300,000 (including licensing, migration, and training).
- **Gaps**: Need to hire external CRM consultant for 3 months.

Workflow Status

- **Current Status**: Awaiting Approval (as of April 29, 2025).
- **Next Steps**: Present to Finance Committee in May 2025 for budget approval.

Written By

- **Author**: Sarah Lee, IT Project Manager
- **Role**: Project Lead
- **Date**: April 29, 2025

The following Business Case was generated by Claude AI

CRM Cloud Migration Business Case

Project ID: CLD-CRM-2025-Q2
Project Name: Enterprise CRM Cloud Migration
Department: Information Technology
Project Sponsor: Sarah Chen, Chief Information Officer
Project Manager: Michael Rodriguez
Date Created: April 29, 2025
Version: 1.0
Status: Draft - Pending Executive Approval
Priority: High
Estimated Budget: $675,000
Expected Duration: 8 months

Executive Summary

Global Dynamics Inc. currently relies on a legacy on-premises CRM system that is approaching end-of-life with vendor support ending in December 2025. This business case proposes migrating our CRM infrastructure to a cloud-based solution to enhance customer engagement capabilities, improve operational efficiency, and reduce long-term IT maintenance costs. The initiative aligns with our 2025 digital transformation strategy and is expected to generate an ROI of 127% over three years with a payback period of 17 months. Implementation would begin in Q3 2025 with full deployment by Q1 2026.

Background Information

Global Dynamics has been using the current on-premises SalesForce Enterprise v9.2 CRM system for over seven years, with significant customizations developed for our specific sales and customer service processes. System performance has degraded over time, and our current architecture lacks integration capabilities with modern cloud tools our teams increasingly rely on. IT maintenance costs have risen 18% annually for the past three years, while system availability has declined to 97.2% against our target of 99.5%.

Our 2025-2027 strategic plan emphasizes customer-centric digital transformation, requiring more robust analytics and omnichannel engagement capabilities that our current system cannot efficiently deliver. Recent competitive analysis reveals that 78% of our industry peers have already transitioned to cloud-based CRM infrastructure, potentially gaining market advantages through improved customer insights and engagement capabilities.

Stakeholders

- **Executive Leadership Team:** Requires improved business intelligence and ROI from customer relationship management
- **Sales Department (120 users):** Primary system users needing reliable mobile access and integrated communication tools
- **Customer Service Team (85 users):** Requires enhanced case management and customer journey tracking
- **IT Department:** Responsible for implementation, integration, and ongoing support
- **Finance Department:** Concerned with cost management and accurate revenue forecasting
- **Marketing Team (45 users):** Needs better campaign attribution and customer segmentation tools
- **Compliance & Legal:** Must ensure data governance and privacy regulations are maintained
- **External Customers:** Will experience improved service delivery and communication channels

Problem Opportunity & Options Analysis

The current on-premises CRM system presents several challenges:

- Limited mobile functionality hampering field sales effectiveness (productivity loss estimated at $325,000 annually)
- Siloed data preventing unified customer view across touchpoints
- Manual reporting processes requiring 25+ hours weekly of analyst time
- Limited scalability during peak seasons causing system slowdowns
- Rising maintenance costs (currently $420,000 annually)

Three options were evaluated:

1. **Maintain Current System with Upgrades**
    - Lowest initial investment ($125,000)
    - Does not address fundamental architecture limitations
    - Continues high maintenance costs and technical debt
    - Risk of unsupported system after December 2025
2. **Build Custom Hybrid Solution**
    - Preserves some existing customizations
    - Higher development complexity and risk
    - Medium initial cost ($900,000) but higher long-term maintenance
    - 14-month implementation timeline
3. **Full Cloud Migration (Recommended)**
    - Higher initial investment ($675,000)
    - Eliminates on-premises infrastructure costs
    - Provides immediate access to new capabilities and regular updates
    - 8-month implementation timeline with phased approach
    - Supports strategic goals for data-driven customer engagement

Consequence of Inaction

Failing to address our CRM infrastructure limitations will likely result in:

- Potential system failure after vendor support ends in December 2025
- Continued productivity loss estimated at $520,000 annually across departments
- Growing competitive disadvantage as competitors leverage advanced cloud CRM capabilities
- Inability to implement planned customer experience initiatives in our strategic roadmap
- Increasing technical debt and maintenance costs projected to rise 20% annually
- Growing security vulnerabilities as security patches become unavailable
- Employee dissatisfaction and potential retention issues among sales and service teams

Expected Benefits

The cloud CRM migration is expected to deliver:

- Reduction in IT infrastructure costs of $275,000 annually starting in year 2
- 15% increase in sales team productivity through improved mobile access and automation
- 30% reduction in reporting time through enhanced analytics capabilities
- Improved system availability from current 97.2% to 99.9%
- Enhanced customer satisfaction through unified communication channels and faster response times
- Scalability to support planned company growth of 20% over next two years
- Annual software license cost reduction of $120,000 through SaaS subscription model
- Improved data security and compliance with automatic security updates

Capabilities Needed & Implementation Approach

Required capabilities:

- Cloud CRM platform with strong mobile support and API ecosystem
- Data migration tools and expertise
- Integration capabilities with ERP and marketing automation tools
- Enhanced analytics and reporting functionality
- Training resources for all user groups

Implementation approach:

- Phase 1 (Months 1-2): Requirements validation and vendor selection
- Phase 2 (Months 3-4): System configuration and data migration planning
- Phase 3 (Months 5-6): Integration development and testing
- Phase 4 (Month 7): User acceptance testing and training
- Phase 5 (Month 8): Go-live and hypercare support
- Cross-functional implementation team with dedicated resources from IT, Sales, and Customer Service
- Change management program including executive sponsorship and department champions

Risk Assessment

Risk	Probability	Impact	Mitigation Strategy
Data migration errors	Medium	High	Comprehensive data audit, multiple test migrations, validation protocols
User adoption resistance	High	Medium	Early stakeholder engagement, phased training approach, identified champions in each department
Integration failures with legacy systems	Medium	High	Detailed integration mapping, API testing framework, contingency interfaces
Budget overruns	Medium	Medium	15% contingency buffer, fixed-price vendor contracts where possible, bi-weekly financial reviews
Timeline delays	Medium	Medium	Agile implementation methodology, critical path monitoring, resource redundancy for key roles
Business disruption during cutover	Low	High	Weekend deployment window, rollback plan, parallel systems during transition

Performance Measurement

Success of the CRM cloud migration will be measured through:

- System availability metrics (target: 99.9% uptime)
- User adoption rates across departments (target: 95% within 60 days)
- Average case resolution time (target: 20% improvement by 6 months post-implementation)
- Sales cycle length (target: 15% reduction by 9 months post-implementation)
- Customer satisfaction scores (target: 8% improvement within first year)
- Report generation time (target: reduction from current 25+ hours weekly to under 8 hours)
- Monthly tracking of actual vs. projected cost savings
- Quarterly executive dashboards showing ROI and KPI progress

Constraints & Assumptions

Constraints:

- Implementation must complete before current vendor support ends (December 2025)
- Total project budget cannot exceed $700,000 (including contingency)
- System must maintain all current compliance certifications (SOC2, GDPR, CCPA)
- Core business operations cannot be disrupted during business hours
- All customizations must be thoroughly documented for future maintenance

Assumptions:

- Vendor selection can be completed within 45 days
- IT resources will be available as scheduled without competing priorities
- Department SMEs will be allocated 25% time to the project during critical phases
- Current data quality is sufficient for migration without major cleansing efforts
- Network infrastructure can support increased cloud traffic without upgrades

Cost Benefit Analysis

Investment costs:

- Software licensing: $325,000 (year 1), $275,000 annually thereafter
- Implementation services: $220,000
- Data migration: $85,000
- Training and change management: $45,000
- Contingency (15%): $101,250
- **Total Year 1 Investment: $675,000**

Annual benefits (steady state):

- Infrastructure cost reduction: $275,000
- License cost savings: $120,000
- Productivity improvements: $325,000
- Reduced maintenance effort: $180,000
- **Total Annual Benefits: $900,000**

Financial analysis:

- Year 1 net benefit: $225,000
- 3-year ROI: 127%
- Payback period: 17 months
- NPV (3 years, 12% discount rate): $1.12M

Senior Level Commitment & Next Steps

Executive sponsorship has been secured from:

- Sarah Chen, CIO (Primary Sponsor)
- David Takahashi, VP of Sales
- Elena Rodriguez, Chief Customer Officer

Next steps:

1. Present business case to Executive Committee for approval by May 15, 2025
2. Form project steering committee with biweekly meeting cadence
3. Initiate procurement process for vendor selection by June 1, 2025
4. Allocate required IT resources and finalize project team by June 15, 2025
5. Begin requirements validation and system design by July 1, 2025

Decision requested: Executive approval to proceed with project initiation and $675,000 budget allocation from FY2025 IT transformation fund.