

YOUR CHECKLIST FOR A SUCCESSFUL BUSINESS CASE: CHARITY CRM SYSTEM

Pragmatiq helps you solve your Charity CRM needs with Microsoft Dynamics 365.

Follow our easy to use checklist to help craft your business case and make sure it is a success!



KEY CONSIDERATIONS AT THE START:

- » What are your current organisational challenges?
Explore current hurdles and challenges giving examples where applicable.
- » Is your current system failing you?
Figure out the current risks of continuing with your current systems.
- » What is the total cost of ownership for your Charity CRM?
Ensure quotes include everything from training and support to maintenance and security etc.



WHAT SHOULD YOU INCLUDE IN YOUR BUSINESS CASE?

Creating a business case can seem daunting, especially when determining how to start. In this section, we will outline what should be incorporated in your business case for a Charity CRM System to ensure a robust presentation.

1. Why does your organisation need a Charity CRM System?

2. How will the new system solve your existing challenges?

3. What are the organisational benefits of moving to Microsoft Dynamics 365?

4. How much budget do you require for this project?

5. What will the business gain from implementing the solution? i.e. ROI

6. How long will the project take? (Provide a timeline)

7. Who will be responsible for project areas like processes, policies, and regulations etc.?

8. What are the key risks and how will they be mitigated?

EMPOWER YOUR MISSION WITH DYNAMICS 365 CHARITY CRM

BUSINESS CASE CHECKLIST: CHARITY CRM




- Outline current challenges your charity is facing
- What risks does your existing system pose?
- Work out the total short and long term cost of solution
- Understand why you need a charity CRM system
- Map out the key details required in your CRM solution
- Outline the benefits of a CRM solution to your charity
- Calculate a budget for your chosen CRM solution
- Work out the potential ROI for your charity
- Create a rough timeline of the entire project
- Allocate responsibility of different areas of the project to corresponding stakeholders

Book a FREE Discovery Call

Start your Charity CRM journey with a free consultation call, in which our experts will explore your organisation and understand your unique needs and goals. We will then advise you on the best possible approach and plan the next steps.

SPEAK TO AN EXPERT

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