CRM Cost Budget Worksheet

Miresh Adhikari · mireshadhikari.com · US dollars

Business: _____ Quote date: _____ Budget period: _____

1. External cash expenses

Item / calculation	Quote / source	First-year amount
Seats: users ____ × monthly rate $____ × paid months ____	_____	$_____
Recurring add-ons / connectors: monthly $____ × months ____	_____	$_____
One-time outside setup / migration fees	_____	$_____
Applicable taxes on purchases: use actual invoice / quote	_____	$_____
Other external charges (describe): _____	_____	$_____
Total first-year external cash expenses		$_____

2. Internal effort

Work	Total hours	Assumed hourly value	Time value
Process design / setup	____	$____	$____
Data cleaning / migration	____	$____	$____
Initial training (all participants)	____	$____	$____
Ongoing administration (full year)	____	$____	$____
Total internal time value			$____

Modeled first-year economic cost = external cash expenses + internal time value = $_____

Do not count the same resource twice. Normal salaried time valued here is not automatically extra payroll cash. Keep additional overtime / contractors in the appropriate cash lines.

3. Payment commitments

Due at signup $_____ Annual prepayment $_____ Regular monthly payments $_____

Renewal date / terms: _____ Required plan / seat minimum: _____

4. Compare equivalent work

Old recurring process: ____ hours/month × $____ × ____ months = $_____

Old external costs over the same period: $_____ Other relevant old costs: $_____

Comparable old total $_____ Proposed CRM economic total $_____ Difference $_____

Include equivalent tasks and periods on both sides. Count ongoing CRM administration once. Time capacity is not cash savings unless actual spending changes.

5. Decision and review

Expected workflow improvement: _____

Baseline / evidence to collect: _____

Owner: _____ Review date: _____ Adopt / Revise / Decline

Original management worksheet, October 29, 2026. Print and write on the sheet; this file does not save entries or submit data.