

Marketing and CRM decision worksheet

Use one workflow and the same comparison period for each option. Fill this in locally in your own document. Record unknowns and how you will check them.

The work

Workflow and useful result:

Tools or modules involved:

Current failure and evidence:

Useful change for the rep or other person doing the work:

Essential requirement, shared acceptance test and acceptable manual steps:

Decision owner, workflow owner and review date:

Comparison period and currency:

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The options

Keep and simplify

Required change and evidence it meets the requirement:

One-time cost and internal hours:

Recurring cost and care over our chosen period:

Main risk or unknown, and how we will check it:

Who will maintain it:

Repair

Required change and evidence it meets the requirement:

One-time cost and internal hours:

Recurring cost and care over our chosen period:

Main risk or unknown, and how we will check it:

Who will maintain it:

Extend or connect

Required change and evidence it meets the requirement:

One-time cost and internal hours:

Recurring cost and care over our chosen period:

Main risk or unknown, and how we will check it:

Who will maintain it:

Replace the constrained part

Required change and evidence it meets the requirement:

One-time cost and internal hours:

Recurring cost and care over our chosen period:

Main risk or unknown, and how we will check it:

Who will maintain it:

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The decision

Preferred option and evidence for it:

Smallest trial and the result it must demonstrate:

Who will test it, including a daily user:

Conditions for proceeding, pausing or returning to the previous workflow:

If keeping or waiting, the accepted limit and review trigger:

You can rule an option out when it fails an essential requirement. Record why. There is no need to turn every option into a full project proposal.

Guide: <https://www.exactwork.ca/guides/repair-or-replace-marketing-crm>

This worksheet does not collect or submit your answers.