CRM SOFTWARE COST ANALYSIS & BUDGETING

Expense Estimation & Total Cost of Ownership (TCO) Template

PROPOSED CRM VENDOR NAME _____

PREPARED BY _____

IMPLEMENTATION START DATE _____

DEPARTMENT / BUSINESS UNIT _____

NUMBER OF TARGET USERS _____

CONTRACT TERM (MONTHS) _____

1. One-Time Setup & Capital Expenditures (CapEx)

Expense Category	Description	Estimated Cost ($)	Actual Cost ($)	Variance ($)
Software Licensing (Upfront / Perpetual)				
System Customization & Configuration				
Data Migration & Cleaning				
Integrations (ERP, Email, Marketing tools)				
User Training & Enablement				
Hardware / Infrastructure Upgrades				
Total One-Time Costs				

2. Recurring Operational Expenses (OpEx)

Expense Category	Billing Cycle (Monthly/Annual)	Unit Cost ($)	Annual Cost ($)	Notes
User Subscription / SaaS Licenses				
Vendor Customer Support (Premium/Dedicated)				
Software Maintenance & Version Updates				
Third-Party Add-on Subscriptions				

Expense Category	Billing Cycle (Monthly/Annual)	Unit Cost ($)	Annual Cost ($)	Notes
Data Storage Fees (Overages)				
Internal Administrator/IT Staff Overhead				
Total Annual Recurring Costs				

3. Three-Year Total Cost of Ownership (TCO) Projection

Cost Component	Year 1 ($)	Year 2 ($)	Year 3 ($)	Cumulative Total ($)
Upfront/One-Time Costs (from Sec. 1)				
Recurring Operational Costs (from Sec. 2)				
Growth Contingency Buffer (e.g., additional seats)				
Projected TCO				

Prepared By (Name / Signature)

Authorized Approval (Name / Signature)