

CRM Use Case Template



Name of Use Case

Define a unique, meaningful name to ensure that everyone uses the same term to avoid confusion.

Business Problem

Use this space to define the issue you are trying to resolve. For example, the issue might be “salespeople don’t have access to feedback that clients share with customer service” or “sales reps are spending too much time typing individual emails to prospects.”

Employees Involved in the Use Case

List the roles involved.

Obstacle(s) to Solving the Problem

Use this space to define the source of the problem.

Business Goal

State what you want the CRM to be able to do. Example: Generate personalized emails to any lead, prospect or client directly from the CRM. Automatically track when and how the recipient responds. Automatically trigger the next event.