HARBOR TOOLS · BUDGET REQUEST

Funding for a sales CRM

A $28,000 first-year investment to replace 30 reps' spreadsheets, and to stop losing deals in the handoff.



30 REPS · 0 SHARED RECORDS

FOR	DECISION	DATE
Managers' meeting	Approve $28,000	17 November 2026

WHAT WE WILL COVER

Five things, then one decision.

01

The cost of spreadsheets

6 hours of reporting a week, and $160K of deals dropped in handoffs last year.

02

What we are asking for

$28,000 in year one, $19,800 a year after that.

03

Three vendors, one choice

Vendor A on price, integration and rollout speed.

04

The return, and when

About $90K of benefit against $28K of cost — payback inside year one.

05

December to March

Contract, setup, training, full use — four months.

06

The decision

Approve the first-year budget of $28,000.

THE PROBLEM TODAY

Thirty reps keep their pipeline in thirty different places.

Deals live in personal spreadsheets and paper notebooks. Nothing is shared, so every report has to be rebuilt by hand and every handoff is a guess.

SALES REPS

30

Each tracking deals in a spreadsheet or a notebook. No single pipeline exists.

EVERY WEEK

6 hrs

Sales operations spends six hours compiling reports by hand — 312 hours a year.

LAST YEAR

$160K

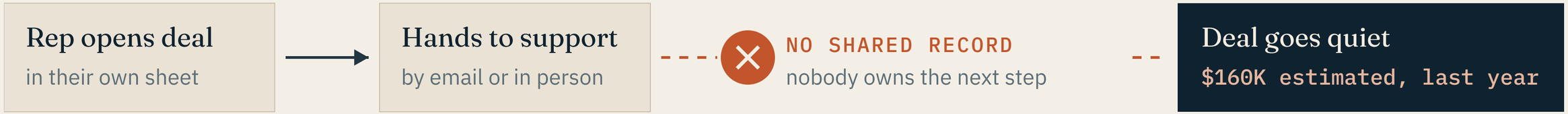
Estimated value of deals lost to dropped handoffs between reps and support.

> None of these three numbers is a tooling preference. They are a reporting cost, a revenue leak, and a risk that grows with every rep we hire.

WHERE THE $160K GOES

A deal is lost at the point where it changes hands.

TODAY · SPREADSHEETS



WITH A CRM



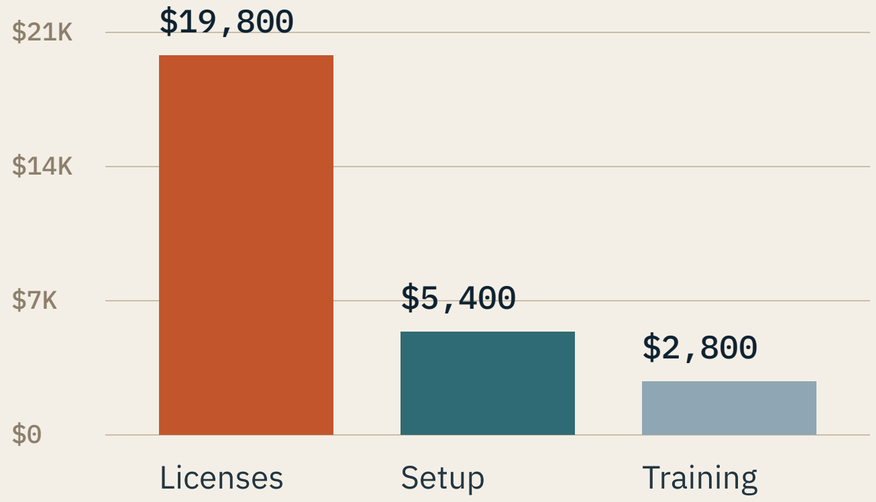
The CRM does not sell for us. It removes the gap in the middle row — the moment when a deal belongs to nobody — and that is where we expect to recover half of last year's loss.

THE REQUEST

We are asking for $28,000 in year one, and $19,800 a year after that.

FIRST-YEAR LINE ITEM	BASIS	COST
Licenses	$55 / user / month × 30 × 12	$19,800
Setup help	One-off, configuration and data migration	$5,400
Training	One-off, all 30 reps	$2,800
Total, year one		**$28,000**
Year two onward	Licenses only	$19,800 / yr

WHERE THE $28,000 SITS



$8,200 of the $28,000 is one-off. The recurring commitment is the license line alone.

THREE OPTIONS COMPARED

Vendor A is the only option that is both cheap enough and connected to our accounting software.

OPTION	PRICE PER USER / MONTH	ACCOUNTING INTEGRATION	ROLLOUT	VERDICT
Vendor A	$55	Works with our accounting software	2 months	RECOMMENDED
Vendor B	$80	More features than we need	4 months	45% dearer, twice the rollout
Vendor C	$35	No integration	rollout	Cheapest, but keeps the manual work

WHY NOT B

At $80 a user the license line would be $28,800 a year on its own — more than our entire first-year ask — and reps would wait four months instead of two.

WHY NOT C

$35 looks like the saving, but with no link to accounting the hand-compiled reporting stays, and the 312 hours stay with it.

WHY A

The middle price, the integration we actually need, and reps are live in two months — inside this fiscal year.

EXPECTED YEARLY BENEFIT

We expect about $90,000 of benefit a year, from two sources we can name.

REPORTING WORK SAVED

312 hrs ≈ $10,000

Six hours a week of sales-operations reporting, returned to sales operations.

DROPPED DEALS RECOVERED

$80K half of $160K

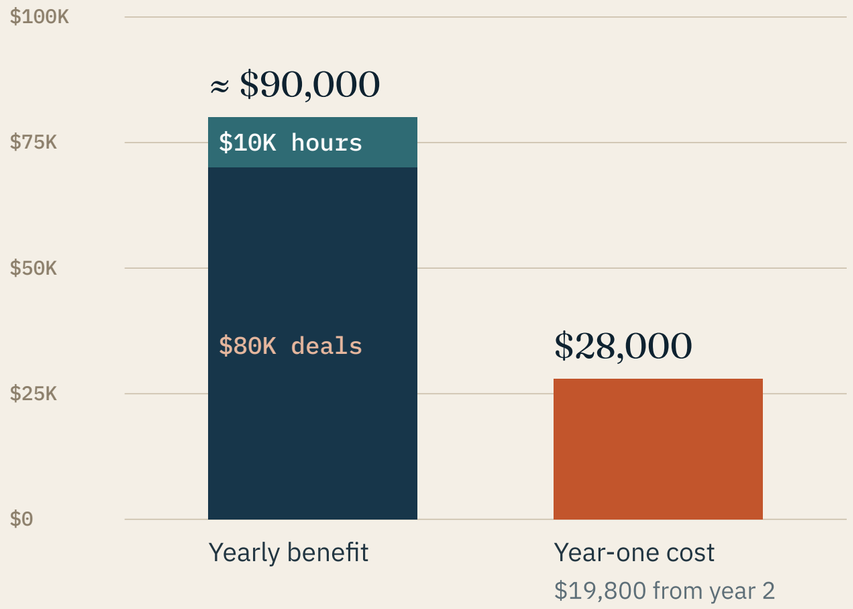
A deliberately conservative claim: we assume we recover half, not all, of last year's loss.

CAPACITY, NOT COUNTED IN THE $90K

60 → 75 proposals / month

Fifteen more proposals a month once reps stop rebuilding their own records.

BENEFIT STACKED AGAINST COST



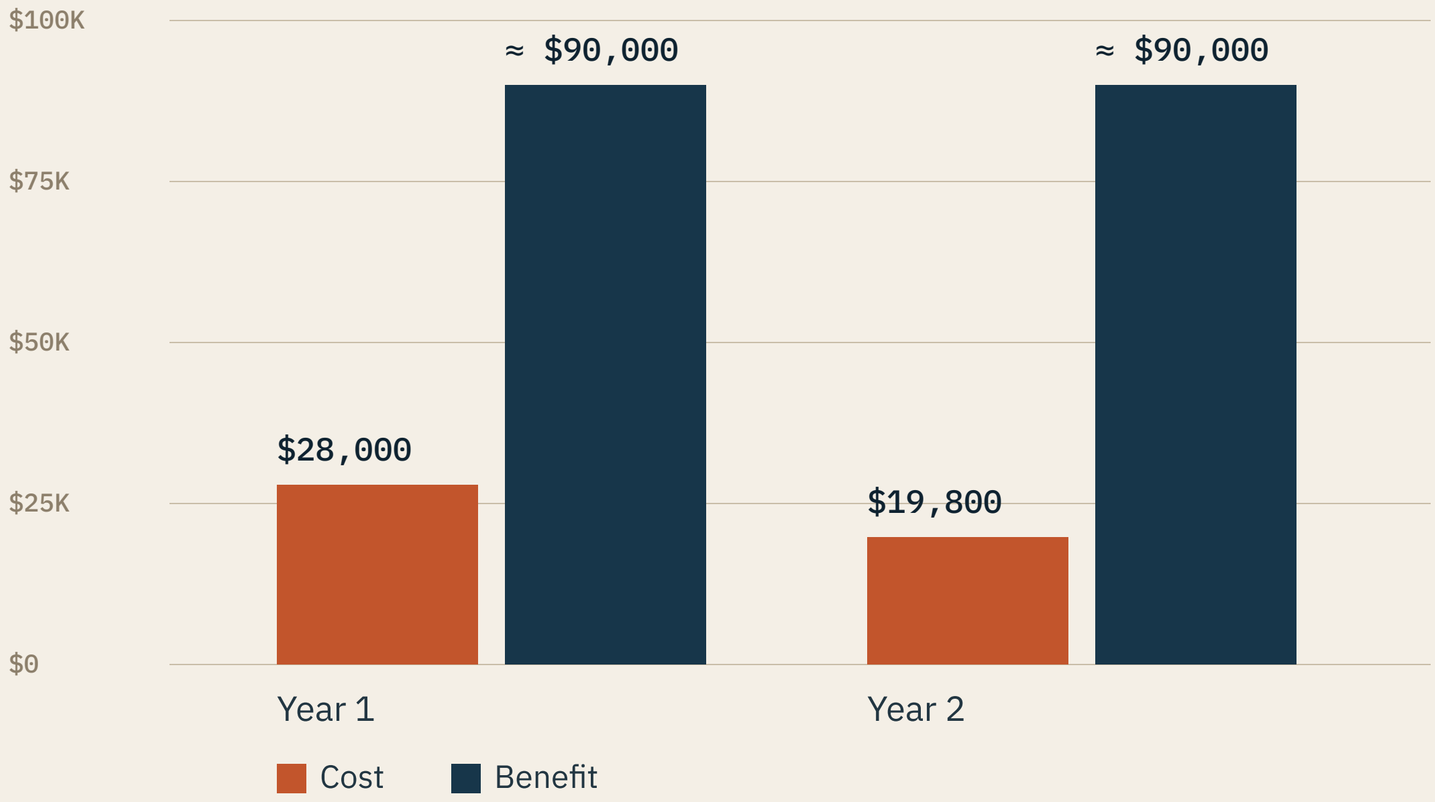
PAYBACK

The CRM pays for itself inside the first year.

BENEFIT PER DOLLAR SPENT, YEAR ONE

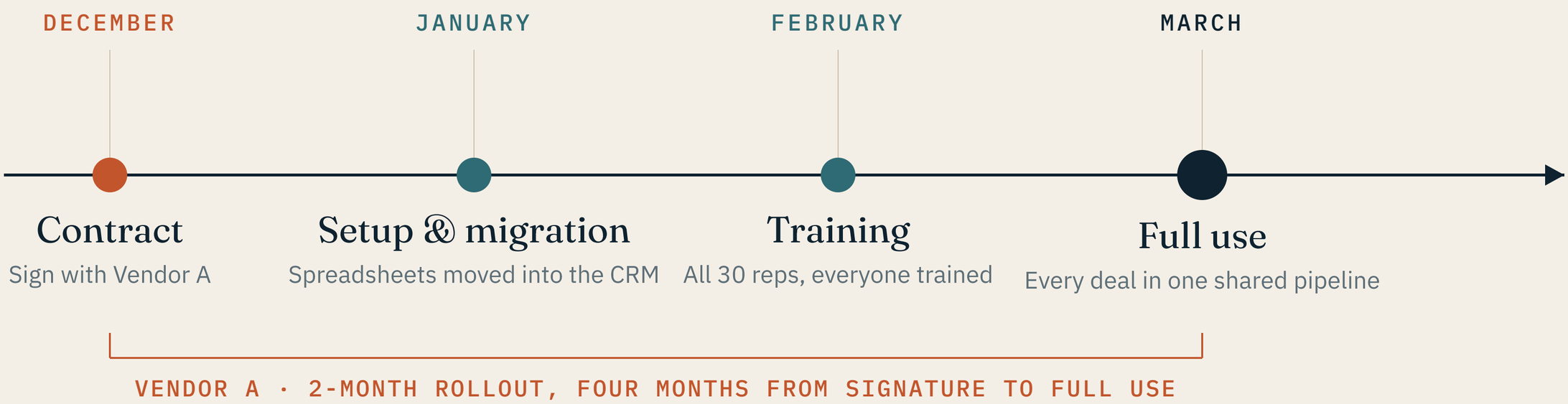
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About $90,000 of benefit against $28,000 of cost. From year two the cost falls to $19,800 while the benefit stays.



TIMELINE

Approve in December and the whole team is using it in March.



The order matters: migration before training, training before we switch reporting over. Choosing Vendor B instead would push full use out by the length of its longer rollout.

IN SUMMARY

Four claims, in the order I made them.

01	**Spreadsheets are costing us money, not just time.** 312 hours of reporting a year, and an estimated $160K of deals dropped in handoffs.	$160K
02	**Vendor A is the right option, for integration and speed.** $55 a user, works with our accounting software, live in two months.	$55 / user
03	**The benefit is about three times the cost, in year one.** $10K of reporting time plus $80K of recovered deals, against $28K spent.	≈ $90K
04	**Approving in December means full use in March.** Contract, setup and migration, training, then every deal in one pipeline.	Dec → Mar

The recurring commitment after year one is $19,800 — the license line, and nothing else.

THE DECISION WE NEED TODAY

Approve the first-year sales CRM budget of $28,000.

$28,000

One-time approval covering licenses, setup and training for all 30 reps. From year two the line is $19,800 a year.

WHAT WE DO ON APPROVAL

Sign with Vendor A in December, migrate in January, train everyone in February.

WHAT WE REPORT BACK

Reporting hours, handoff losses and monthly proposals — against today's 6 hours, $160K and 60.

IF WE DO NOTHING

Another year of hand-built reports, and another year of deals lost in the handoff.