

### How much should you spend on a membership CRM?

Digital transformation projects, such as replacing your membership CRM system, can be expensive and disruptive. However moving to modern technology is essential if your organisation is to grow and meet the ever-changing demands and expectations of members.

Setting a realistic budget that is going to ensure you achieve your project goals is essential. Without a suitable budget, you may find you implement a smaller system that you outgrow very quickly and find yourselves back in the market sooner than expected, experiencing more cost and disruption.

Here are 7 key questions to ask yourself before deciding on your budget.

#### 1. What is the scope of the project?

Have you considered what current systems and software you are replacing, and do you need the CRM to integrate with your website and facilitate services via a member portal?

With oomi, we will work with you to ensure you understand the full scope of the project and the related costs. There will be no surprises.

#### 2. Have you considered additional project costs?

When budgeting for a CRM you need to consider more than just the licence cost. There are other essential tasks to cost, such as data cleansing, migration, integrations with other systems, testing and training.

We will provide a comprehensive costed project plan and continuous improvement programme.

#### 3. What is the intended life-span of the system?

Have you considered costs of upgrading, expanding, adding functionality, and other developments, to cater for your organisations changing needs over this life-span?

We have an established product road map, and all product improvements are rolled out across our user base, and are influenced by our membership customers via our active bi-annual User Group.

#### 4. Have you got realistic expectations of what you should spend on technology?

Research into the membership sector sources suggests that organisations spend between 5-7% of their annual turnover on technology (*optimalnetworks, 2024; Memberwise 2023*)

**oomi** clients typical spend between 3% and 6% of their annual revenue on their digital transformation project.

### How much should you spend on a membership CRM?

#### 5. Have you established a business case for the investment?

A costed business case is a must-have, and it should include an expectation of the return on investment (ROI) you want from the project. This will help you set a realistic budget based on what you want to achieve and get buy-in from stakeholders.

We can work with you to establish a sound business case, based on our experience in the sector.

#### 6. Have you set project objectives and key performance indicators (KPIs)?

Have you identified the key processes you want to manage and improve with the new system and how you are going to measure the success of the project? This will help you define the scope, business case, and ultimately the budget for the project.

We share best practices from the sector and advise where your focus should be to maximise ROI.

#### 7. Have you considered the internal resources required to manage the project?

A CRM replacement project requires as much input from your organisation as it does from your selected supplier. Ensure you understand what is expected of you.

We will outline the commitments in resources required from your organisation to ensure the project is a success and meets deadlines and objectives.



**find  
out  
more**

You can get more information about selecting the right CRM, including webinars and customer stories, on our website **[www.oomi.co.uk](http://www.oomi.co.uk)**

If you would like to discuss your technology challenges related to membership management, we would love to hear from you.



complete membership management  
for you and your members

+44 (0) 1372 232 125

hello@oomi.co.uk

oomi.co.uk

Global House,  
1 Ashley Avenue,  
Epsom, Surrey  
KT18 5AD

©2025 Centrepont Computer Services Limited is the author and service provider of oomi and oomi products. All rights reserved. Company registration number: 2620738. Registered in England and Wales. VAT Number: GB165 8745 66.