GUIDE

# How to Build a Budget-Proof CMI Platform Business Case

## (In 8 Days or Less)

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Stop trying to prove intelligence is valuable.
Start proving your current approach is expensive.

Most CMI platform evaluations end in "let's revisit next quarter."
This guide shows you how to break that pattern using the only eviden-
ce your CFO actually trusts:

**<u>Your company's own internal data.</u>**

A practical framework from Valona Intelligence

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# About this Guide

You don't need all seven data sources to build a compelling case. Even 2-3 well-documented sources prove your intelligence gaps are expensive enough to prioritize.

Each day takes 20-60 minutes. By Day 8, you'll have specific dollar amounts, documented examples, and a complete business case using your organization's actual data.

Ready to prove what your intelligence gaps actually cost?

# Why Most CMI Business Cases Fail

Most competitive and market intelligence platform evaluations end the same way: "This looks interesting—let's revisit next quarter." And then they never do.

Here's what actually happened: You couldn't prove the problem is expensive enough to prioritize right now.

## The No-Decision Problem

40-60% of B2B software purchases end in "no decision." (Harvard Business Review). Not because leadership said no. Because the champion couldn't build enough internal consensus to move forward.

- Your intelligence team knows you need better infrastructure—they spend 80% of their time hunting for data instead of analyzing it.
- Your strategy team knows it—intelligence arrives after decisions are already made.
- Your sales team knows it—they're scrambling for competitive intel hours before major deals.

But your CFO doesn't know any of this. They can tell you what every SaaS subscription costs, but have no idea what you're spending on scattered intelligence activities.

Knowing something matters and proving it's worth budget are two completely different conversations.

## What Actually Gets Approved

Most business cases try to prove intelligence is strategically valuable. They cite industry research. They reference case studies. They build ROI models based on hypothetical improvements.

Here's the problem: Your CFO already agrees intelligence matters. What they don't know is how much your current approach costs right now.

Business cases that get approved don't argue for value creation. They document cost avoidance.

**They show:**

- Hidden labor costs → 20 people spending 10 hours/week on manual research = $300K-500K annually
- Revenue impact → Lost deals where sales got caught off-guard by competitor moves = $X in attributable losses
- Strategic delays → Market entry stalled 6 weeks gathering intelligence = delayed revenue, missed windows
- Tool sprawl → Multiple overlapping subscriptions because there's no central system = $X in redundant spending

Notice what these have in common: They're not hypothetical. They're already happening.

You're already paying these costs—you're just not measuring them.

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# The Two Questions You're Actually Answering

## Question 1

### "Is this strategically valuable?"

Easy. Everyone agrees. Intelligence helps you compete better, move faster, reduce risk. This is also where most business cases stop—which is why they stall.

## Question 2

### "Is fixing this expensive enough to prioritize right now?"

This is the hard one. This is where evaluations die.

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Your CFO is weighing your request against fifteen other initiatives:

- Sales wants headcount
- Product wants better tools
- IT wants infrastructure upgrades
- Marketing wants event budget

Every champion believes their initiative should win.

Your job isn't to prove intelligence is valuable. Your job is to prove your current approach has quantifiable costs that make fixing it more urgent than everything else.

When you say: "Companies with better intelligence grow 23% faster" Your CFO hears: "Interesting, but not specific to us."

When you say: "We're spending $400K annually on scattered research, losing deals to preventable blind spots, and delaying strategic decisions by 3 weeks on average" Your CFO hears: "We're hemorrhaging money right now."

The question shifts from "Should we invest?" to "Can we afford NOT to?"

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# How This Guide Works

Over the next 8 days, you'll collect internal data across 7 sources. Each quantifies a different type of intelligence gap:

Day 1: CRM & lost deals → Competitive blind spots with revenue impact
Day 2: Employee confidence → Intelligence gaps affecting decisions
Day 3: Time costs → Hidden research tax across your org
Day 4: Request volumes → Demand vs. capacity mismatch
Day 5: Sales confidence → Intelligence access vs. win rates
Day 6: Tool performance → Proof current systems aren't working
Day 7: Decision delays → Strategic costs of slow intelligence
Day 8: Assembly → Turn it all into a bulletproof business case

You don't need all seven. Even 2-3 sources build a compelling case.

Each day takes 20-60 minutes. By the end, you'll have specific dollar amounts, documented examples, and a complete business case using your organization's actual data.

Ready to prove what your intelligence gaps actually cost?

**Great. Let's get started!**

# Day 1: CRM & Lost Deals

- **What you're proving:** Competitive blind spots cost you revenue
- **Time investment:** 30-45 minutes
- **Data accessibility:** 4/5

## Why This Matters

Your closed-lost deals contain specific examples of intelligence gaps with price tags attached. When you lose because "we didn't know they offered that" or "caught off-guard by their pricing change," that's quantifiable missing intelligence.

## What to Collect

Search CRM notes and loss reasons for:
- Competitor names and "lost to [competitor]" mentions
- Phrases like "didn't know," "caught off-guard," "couldn't answer," "need to look into"
- Questions your team couldn't answer during sales process
- Customer requirements you didn't know were standard
- Competitive moves that surprised you mid-deal

**Where to find it:**
- Closed-lost deals (past 90 days)
- Support tickets with competitive mentions
- Sales call transcripts (Gong, Chorus, etc.)
- Account review notes

Don't have CRM access? Ask sales ops or revenue ops to pull competitive loss data.

## Collection Template

| Date | Deal Value | Information Gap | What Happened | Impact |
|------|-----------|-----------------|---------------|--------|
| Q3 | $250K | Didn't know Competitor X dropped prices 30% | Lost deal, price objection | $250K revenue |
| Sept | $180K | Couldn't answer questions about their API capabilities | Deal stalled, lost to competition | $180K revenue |
| Oct | $90K | Unaware competitor launched feature we were asked about | Lost credibility, deal went cold | $90K revenue |

**Download fillable worksheet**

## You Have Enough When...

You've documented 5-10 examples where missing intelligence affected outcomes.

Look for patterns:
1. Same competitor showing up repeatedly
2. Similar information gaps across deals
3. Specific features or capabilities you didn't know about
4. Pricing/positioning changes you missed

## Common Obstacles

"Our loss reasons are too generic"
→ Go deeper. Read the actual notes. Sales reps often write specific details that don't make it into dropdown menus.

"Sales won't share this data"
→ Frame it as "helping us win more competitive deals." You're identifying gaps to fix, not assigning blame.

"I can't find dollar amounts"
→ That's okay. Document the gap itself. "Lost 3 deals in Q4 because we didn't know about Competitor A's new pricing model" is still compelling.

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**What Good Looks Like**

**Strong example:**
"Lost $250K deal in Q3. Sales team didn't know Competitor X had dropped enterprise pricing by 30% two months earlier. Prospect said we were 'way too expensive' and went with X. Sales rep wrote: 'Wish we'd known about their price change—would've positioned differently.'"

**Why it works:** Specific date, dollar amount, clear gap, direct quote showing impact.

# Day 2: Employee Confidence Data

- **What you're proving:** Intelligence gaps affect performance across your organization
  **Time investment:** 20-30 minutes
- **Data accessibility:** 4/5

## Why This Matters

When employees express doubt about strategic direction, leadership assumes it's a communication problem. Often it's an intelligence problem—people lack competitive and market context to understand why decisions are being made.

Low confidence in customer-facing and strategic roles is especially costly. That's where market awareness directly impacts performance.

## What to Collect

Survey responses showing:
- Confidence in strategic direction and company priorities
- Understanding of competitive positioning
- Access to information needed for daily work
- Patterns in which teams/roles score lowest

## Three paths to get this data:

Path A: Review existing employee engagement surveys
→ Ask HR for reports with relevant questions

Path B: Add 2-3 questions to upcoming surveys
→ Work with HR to include in next pulse survey

Path C: Run your own quick survey (fastest option)
→ Use Google Forms, Teams poll, or any simple tool

# Why Most CMI Business Cases Fail

**Quick Survey Template**

Send to: Sales, Product, Strategy, Customer Success, Marketing (aim for 10-15 responses minimum)

**Question 1:**
How confident do you feel in your understanding of our competitive positioning?
[1-5 scale: Not confident → Very confident]

**Question 2:**
How often do you need competitive or market intelligence but can't find it quickly?
[Never / Rarely / Sometimes / Often / Very Often]

**Question 3 (optional):**
What type of competitive or market information do you wish you had easier access to?
[Open text]

**Download survey template →**

**You Have Enough When…**

You have responses showing patterns in confidence gaps, especially in:
- Customer-facing roles (Sales, CS, Account Management)
- Strategic roles (Product, Strategy, Leadership)
- Teams that should be intelligence-informed but aren't

**Common Obstacles**

"HR won't add questions to surveys"
→ Run your own. Even 10-15 responses show patterns.

"People might not answer honestly"
→ Make it anonymous. Frame as "helping improve access to information you need."

"I only got 8 responses"
→ That's fine if they show clear patterns. Quality > quantity.

**What Good Looks Like**

**Strong finding:**
"Survey of 12 product managers: Average confidence in competitive positioning = 2.3/5. 83% report needing competitive intel 'often' or 'very often' but can't find it quickly. Common requests: competitor roadmaps, feature comparisons, pricing changes."

**Why it works:** Shows both the gap (low confidence) and the demand (frequent need). Specific to a role where this impacts decisions.

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# Day 3: Time Cost Calculations

- **What you're proving:** Manual research is expensive hidden labor
- **Time investment:** 45 minutes
- **Data accessibility:** 3/5

## Why This Matters

When teams spend hours hunting for competitive intelligence instead of analyzing it, that's not just inefficient—it's expensive. Today you're translating research time into actual dollars.

## What to Collect

**Time spent on manual intelligence gathering:**

- Hours per week spent searching for competitor info, market data, industry insights
- Who's doing this work (sales, product, strategy, account management)
- What they're researching (competitor pricing, features, market trends)
- Time that could be spent on higher-value work

## How to Get This Data

Option A (Faster): Interview 3-5 people in key roles

Ask them:
- How much time do you spend per week on competitive or market research?
- What's a recent example? How long did it take?
- How often does this happen?

Option B (More Accurate): Quick survey to key teams

Ask them to estimate weekly research time and give recent examples.

## Collection Template

| Role/Team | Hours/Week on Research | Recent Example | Time Spent | What They'd Rather Be Doing |
|---|---|---|---|---|
| **Product Manager** | 4 hrs | Competitive feature analysis for roadmap planning | 3 hours | Building strategy, not hunting for data |
| **Sales per rep** | 3 hrs | Finding competitor pricing before big deal | 4 hours | Selling, not researching |
| **Strategy Analyst** | 8 hrs | Market sizing for new initiative | 12 hours | Analysis, not data collection |

**Download worksheet**

### Calculate the Impact

**Simple formula:**
[# of people] × [hours/week] × [hourly rate] × 52 weeks = Annual cost

**Example:**
- 5 people spending 3 hours/week on research
- 15 hours/week total
- $75/hour (conservative for professional roles)
- 15 × $75 = $1,125/week
- $1,125 × 52 = $58,500/year

That's just 5 people. Now scale across your organization.

**Conservative hourly rates:**
- Junior roles: $50-60/hr
- Mid-level: $75-100/hr
- Senior: $100-150/hr
- Leadership: $150-250/hr

Use loaded rates (salary + benefits + overhead), not just base salary.

### You Have Enough When...

You've documented time costs from 3-5 people across different functions and can calculate an annual dollar amount. Even a conservative estimate across a small sample extrapolates to eye-opening numbers.

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## Common Obstacles

"People don't track their research time"
→ Ask for estimates and recent examples. "Last time you had to research a competitor, how long did it take?"

"The time varies a lot"
→ Get a range and use the conservative end. "I spend anywhere from 2-8 hours per week" → Use 3 hours for your calculation.

"I only talked to 3 people"
→ Perfect. Calculate their cost, then note "This represents just 3 individuals—similar patterns exist across [X other roles/teams]."

## What Good Looks Like

**Strong finding:**
"Interviewed 4 product managers: Each spends 4-6 hours/week on competitive research (avg 5 hrs). At $90/hr loaded rate: 5 hrs × $90 × 4 people = $1,800/ week = $93,600/year. Just in Product. Sales, Strategy, and Marketing show similar patterns."

**Why it works:** Specific roles, real time estimates, calculated cost, notes that this is a partial view.

# Day 4: Research Request Volumes

- **What you're proving:** Demand massively outpaces capacity
- **Time investment:** 30 minutes
- **Data accessibility:** 4/5

## Why This Matters

If your intelligence team is buried in requests with a growing backlog, that's not just a resourcing problem—it's proof your current system can't scale to actual demand.

Overwhelming volumes and duplicate requests prove both the high value of intelligence AND the inefficiency of current processes.

## What to Collect

**Evidence of demand vs. capacity mismatch:**

- 
- Total requests received vs. completed
- Current backlog of unanswered questions
- Average response time (hours? days? weeks?)
- Duplicate requests for same intelligence across departments
- Types of requests (competitor profiles, market sizing, pricing analysis)
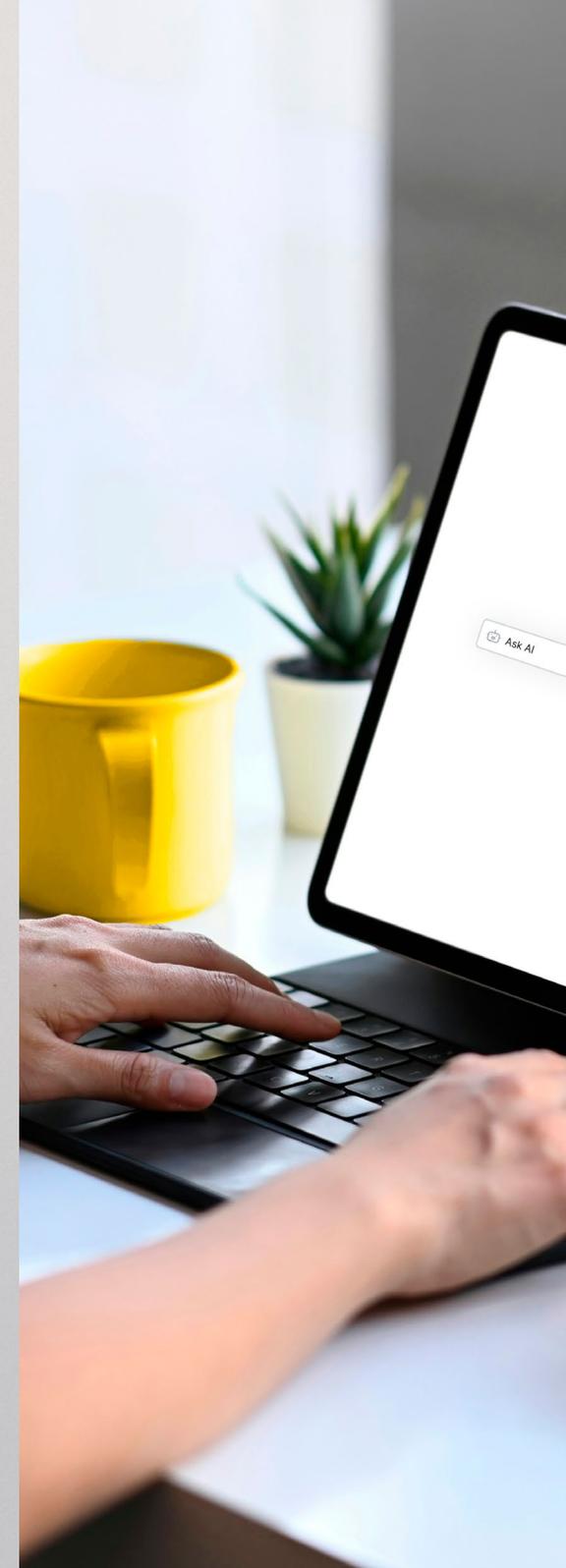- When things get overwhelming (peak periods)

## Where to Find It

**If you have tracking:**
Pull request data from your ticketing system (Forms, SharePoint, Jira, Asana, email folders)

**If you don't:**
Interview your intelligence lead or team (even if that's you)

## Interview Questions

- How many requests do you get per week?
- How many can you actually complete?
- What's currently in your backlog?
- What requests do you see repeatedly?
- When do things get overwhelming?
- What happens to requests you can't handle?

## You Have Enough When...

**You can show:**
- Requests exceed capacity by X%
- Backlog is growing (or staying persistently high)
- Same questions get asked repeatedly
- Response times measured in days/weeks, not hours

## Common Obstacles

"We don't formally track requests"
→ Start now. Even one week of logging shows patterns. Or reconstruct last month from email/Slack.

"Our team handles requests informally"
→ That's actually part of the problem. Estimate based on what you remember from recent weeks.

÷I don't have a team—I'm the only one"
→ Perfect. Document what YOU can't keep up with. "I receive 8-10 requests/week, can complete 3-4, rest get delayed or people give up."

## Collection Template

| Metric | Current State |
|---|---|
| Requests received/week | 15-20 |
| Requests completed/week | 6-8 |
| Current backlog | 32 requests |
| Average response time | 8-12 days |
| Most common duplicates | Competitor X pricing (asked 5x in Q4), Market size for Europe (asked 3x) |
| Peak periods | End of quarter, pre-board meetings, sales kickoffs |

**Download worksheet**

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## What Good Looks Like

**Strong finding:**
"Intelligence team of 2 receives 18-25 requests weekly, completes 8-12. Current backlog: 38 requests, some 6+ weeks old. Response time averages 10 days. Top duplicate: 'What's Competitor A's pricing?' asked 7 times across Sales, Product, and Partnerships in Q4 alone."

**Why it works:** Shows volume gap, proves system is overwhelmed, demonstrates inefficiency (duplicates), implies hidden costs (people waiting or doing research themselves).

# Day 5: Sales Confidence Metrics

- **What you're proving:** Intelligence gaps correlate with win rates
- **Time investment:** 20-30 minutes
- **Data accessibility:** 3/5

## Why This Matters

When sales teams lack competitive intelligence, it shows up in longer cycles, lower win rates, and smaller deals. Confidence scores make that connection concrete.

Even basic confidence data helps build your case.

## What to Collect

**Sales team readiness for competitive situations:**
- Confidence competing against specific competitors (not generic "how confident are you?")
- Comfort handling competitive objections
- Access to competitive intelligence when they need it
- Recent situations where they felt caught off-guard
- Requests for additional competitive support

## Where to Find It

**Existing data sources:**
- Sales team surveys or assessments
- Win/loss analysis reports
- Quarterly business reviews
- Sales enablement feedback

**Create new data:** Send a quick 3-question survey to your sales team
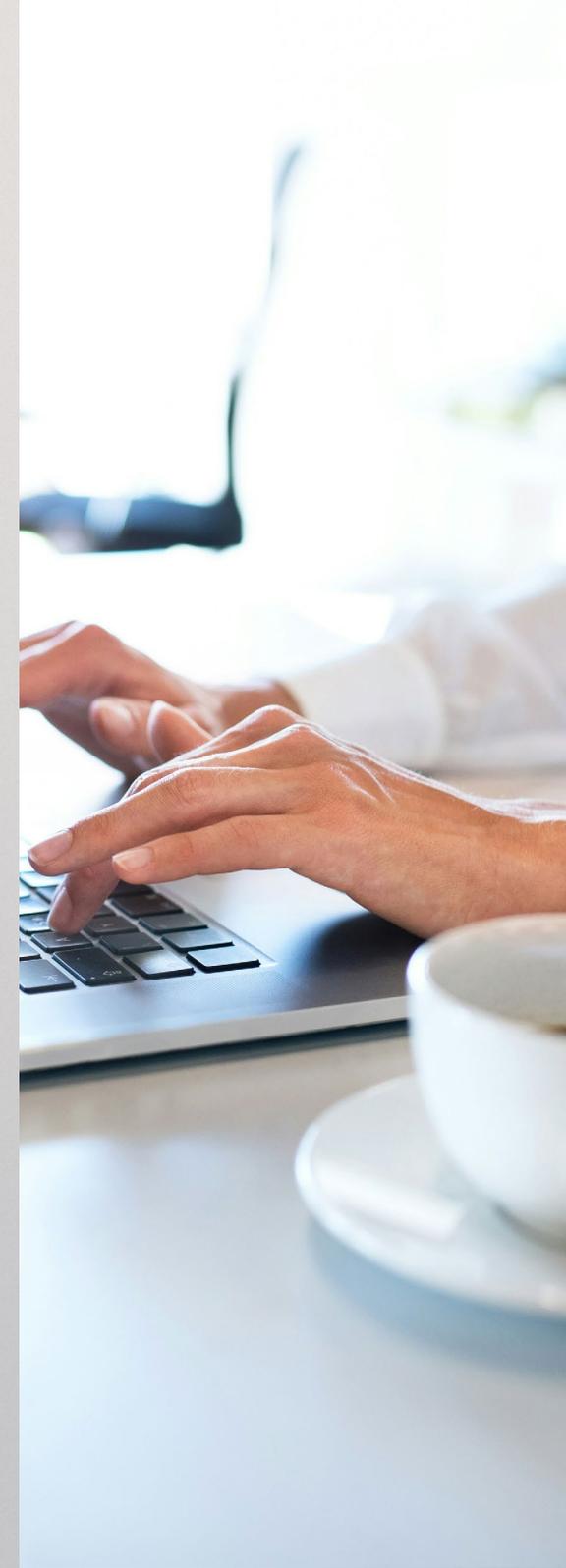
## Quick Sales Survey

Question 1:
How confident do you feel when [Competitor A] shows up in a deal?
[1-5 scale: Not confident → Very confident]

Repeat for your top 3-4 competitors

Question 2:
How often do you have the competitive intelligence you need when entering a competitive deal?
[Never / Rarely / Sometimes / Often / Always]

Question 3:
Describe the last competitive situation that caught you off-guard.
[Open text]

**Download survey template →**

## You Have Enough When...

· You have confidence scores showing:
· Low readiness against key competitors (under 3/5)
· Patterns in what information they're missing
· Specific examples of competitive surprises
· Correlation to performance (if available)

## Common Obstacles

"Sales is too busy to fill out surveys"

→ Make it 3 questions, takes 2 minutes. Or just ask your sales leader directly.

"I only got responses from 6 reps"
→ That's fine. If 6 reps all score 2.5/5 confidence against your main competitor, that's a pattern.

"We don't track win rates by competitor"
→ You don't need that. Confidence scores alone show the gap.

## The One Question That Works

If you can't do a survey, ask your sales leader:

"What competitive situation caught us off-guard recently?"

That question alone often surfaces the most compelling examples for your business case.

## What Good Looks Like

**Strong finding:**
"Survey of 8 sales reps: Average confidence vs. Competitor X = 2.1/5. 75% report having needed intel 'rarely' or 'sometimes' in competitive deals. Recent example: Lost $180K deal because rep didn't know Competitor X had launched new API features prospect asked about. Quote from rep: 'I looked unprepared because I was.'"

**Why it works:** Quantified low confidence, shows frequency of gap, includes specific story with impact, direct quote showing real consequence.

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# Day 6: Tool Performance Data

- **What you're proving:** Current systems aren't working
- **Time investment:** 15 minutes (just sending an email)
- **Data accessibility:** 2/5

## Why This Matters

Your current research tools, databases, and knowledge systems generate performance data. IT tracks it. And it likely shows your tools aren't keeping up with how people actually need to work.

Even anecdotal evidence about system bottlenecks influences leadership.

## What to Collect

**Evidence that current tools aren't meeting demand:**
- Adoption rates and active users vs. license capacity
- System uptime/downtime patterns
- Support ticket volumes for access issues, functionality problems
- User satisfaction scores from IT surveys
- Search success rates or time-to-find information (if tracked)

**Applies to any intelligence-related tools:**
- Research databases
- Subscription news services
- Knowledge management systems
- SharePoint/document repositories
- Collaboration tools used for intel sharing

**Your Task: Send One Email**

**Draft and send this to your IT contact:**

Subject: Quick question about our research tool performance data

Hi [Name],

I'm building a business case for improving our competitive intelligence capabilities and would love your help.

Do you track any performance metrics for our research and knowledge management tools? Specifically:
· Adoption/usage rates
· Support ticket volumes for access or functionality issues
· System reliability (uptime/downtime)
· User satisfaction scores

Even anecdotal evidence about system bottlenecks or common user complaints would be helpful.

Would you have 15 minutes this week to discuss what data exists?

Thanks,
[Your name]

**Copy email template →**

## Where IT Usually Has This Data

- Service management platforms (ServiceNow, Jira Service Management)
- Vendor dashboards
- IT support ticket systems
- User feedback surveys

## You Have Enough When...

**You have data or anecdotes showing:**
- Low adoption (licenses going unused)
- High support volume (people can't access or use tools)
- Poor reliability (downtime, broken features)
- User dissatisfaction (complaints, workarounds)

## Common Obstacles

"IT says they don't track that"
→ Ask about support tickets. "How many tickets do we get for [tool name] issues per month?"

"IT is too busy to help"
→ Frame it as partnership: "Trying to improve tool ROI and reduce support burden." You're on the same side.

"We don't have formal intelligence tools"
→ That's actually your data point. "No dedicated intelligence infrastructure—teams use generic tools not designed for this purpose."

## What Good Looks Like

**Strong finding:**
"IT data shows: Market research database has 50 licenses, only 18 active users (36% adoption). Generated 47 support tickets in Q4—most for login issues and 'can't find what I need.' IT reports users frequently ask 'Is there a better way to search this?' Average user satisfaction: 2.1/5."

**Why it works:** Shows underutilization (wasted money), high support burden (IT pain), poor user experience (people aren't finding what they need).

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# Day 7: Decision Timeline Analysis

- **What you're proving:** Intelligence gaps delay strategic decisions and carry real costs
- **Time investment:** 60 minute
- **Data accessibility:** 2/5

## Why This Matters

This is the hardest data source—but the most powerful.

Strategic decisions delayed by intelligence gathering or made with incomplete information carry real costs: lost deals, delayed market entry, higher project costs, missed regulatory windows.

When you tell your CFO "our market entry decision was delayed 6 weeks while we gathered competitive intelligence, costing us $X in delayed revenue"—that's what gets budget approved.

## What to Collect

Recent strategic decisions where intelligence gaps caused problems:

- Total timeline from trigger to final action
- Time spent gathering market or competitive intelligence
- Bottlenecks caused by missing information
- Cases where decisions were made with incomplete data
- Decisions rushed without proper competitive context
- Lag between market events and organizational awareness
- Quantified impact of delays (revenue lost, increased costs, missed opportunities)

## How to Do This

**Step 1: Pick 2-3 high-impact decisions from the past year**

Good candidates:
- Market entry or expansion decisions
- Major product launches or pivots
- Pricing strategy changes
- M&A evaluations
- Competitive response decisions
- Strategic partnerships

**Step 2: Interview the stakeholders involved**

**Ask them:**

- When did this decision process start and what triggered it?
- How long did it take to reach a decision?
- What intelligence did you need but didn't have readily available?
- How much time was spent hunting for or validating information?
- What was the cost or consequence—in delay, rework, or missed opportunity?
- How would better or faster intelligence access have changed the outcome?

## Collection Template

Decision: [Name of strategic initiative]

Timeline:
- Started: [Date]
- Decided: [Date]
- Total duration: [X weeks]

Intelligence Bottlenecks:
- Needed: [What information was required]
- Time spent gathering: [X weeks]
- Sources used: [Where they had to look]
- Delays caused: [How long it held things up]

Business Impact:
- Direct costs: [$ if calculable]
- Opportunity costs: [What was missed/delayed]
- Quality impact: [Decision made without complete info?]

Stakeholder Quote: "[How better intelligence would have helped]"

**Download worksheet →**

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## You Have Enough When...

You've documented 2-3 decisions showing:
- Clear intelligence bottlenecks
- Measurable delays or impacts
- Stakeholder frustration with the process
- Quantified costs (even estimated)

## Common Obstacles

"Can't get stakeholder time"
→ Start with one person who'll talk to you. One good story is enough.

"Hard to calculate exact costs"
→ Use ranges. "Delayed market entry by 6-8 weeks, estimated impact $200K-400K in delayed revenue."

"Decision-makers won't admit mistakes"
→ Frame as process improvement, not blame. "How could better intelligence infrastructure have helped?"

## What Good Looks Like

**Strong finding:**
"Market entry decision for EMEA region (Q2): Took 11 weeks from kickoff to decision. 4 weeks spent gathering competitive landscape data—manually researching 8 competitors across pricing, positioning, distribution. Strategy team interviewed: 'We made the call with incomplete data because we hit our deadline. Later learned Competitor X had just launched similar offering—would have changed our approach.' Delayed entry cost estimated $300K in Q3 revenue."

**Why it works:** Specific decision, clear timeline, quantified intelligence-gathering time, shows both delay AND quality impact, includes stakeholder perspective, attempts to calculate cost.

# Day 8: Assembly

- **What you're doing:** Turning everything into a bulletproof business case
- **Time investment:** 2 hours
- You've done the hard part—now organize it

## Calculate Your Total Costs

| Cost Category | Annual Impact |
|---|---|
| Manual research time (Day 3) | $[Calculate: hours × rate × 52] |
| Lost/delayed revenue (Day 1) | $[Sum of competitive loss examples] |
| Decision delays (Day 7) | $[Estimated impact of delays] |
| Tool underutilization (Day 6) | $[Unused licenses + support costs] |
| TOTAL | $[SUM] |

This is what your status quo costs **right now**.

## The One-Page Business Case

**Problem Statement (3 sentences):** [Company] treats intelligence as ad-hoc activity, not systematic infrastructure. Our teams spend $[X] annually on manual research, we've documented $[Y] in competitive blind spots, and strategic decisions delay [Z weeks] while gathering intelligence. Current system can't scale to demand.

**Evidence (bullets):**
- Time cost: [X people] spend [Y hours/week] researching = $[Z] annually (Day 3)
- Lost revenue: [X deals] affected by competitive blind spots = $[Y] impact (Day 1)
- Capacity gap: [X requests/week] received, [Y] completed, [Z] backlog (Day 4)
- Confidence: Sales avg [X/5] confidence vs. top competitors (Day 5)
- Decision delays: [X] strategic initiatives delayed avg [Y weeks] (Day 7)
- Employee impact: [X%] of strategic roles lack market context (Day 2)
- Tool performance: [X%] adoption, [Y] support tickets (Day 6)

**What We're Proposing:** CMI platform investment to establish continuous monitoring, centralized infrastructure, and organization-wide intelligence access.

**Expected Outcomes:**
- Reclaim $[X] annually (60-80% reduction in manual research)
- Prevent competitive surprises through proactive monitoring
- Accelerate decisions by [X weeks]
- Improve sales confidence and win rates

**Investment:** $[Platform cost]
**Payback:** [X months]
**3-Year ROI:** [X%]

**Download complete business case template →**

## Tailor to Your Stakeholder

For CFO: Lead with total cost ($), payback timeline, ROI
For CRO: Lead with lost deals ($), sales confidence scores, win rate impact
For CIO: Lead with tool sprawl, support burden, adoption rates
For CSO: Lead with decision delays, quality of intelligence, strategic impact

## Pre-Presentation Checklist

**Before you present:**

- Run it past someone who'll give honest feedback
- Verify your calculations (especially $ amounts)
- Prepare for top 3 objections (see below)
- Have backup data ready if challenged
- Know what you're asking for (budget range, timeline)

## Top 3 Objections & Responses

"Can't we just hire another person?"
→ "We've calculated $[X] in scattered research costs. One person doesn't solve the infrastructure problem—they just become another bottleneck. A platform scales, a person doesn't."

"This seems expensive."
→ "We're currently spending $[X] on the status quo. This consolidates that spend and makes it more effective. We're not adding cost, we're optimizing what we already spend."

"Let's just try free/cheap tools first."
→ "We have data showing our current tools generate [X] support tickets and [Y%] adoption. The problem isn't lack of tools—it's lack of systematic infrastructure that people actually use."

# Get Unstuck

"I only collected 2 data sources"
→ That's enough. Two well-documented sources beat seven mediocre ones.

"My data is messy"
→ Use it anyway. Estimate conservatively. "At least $X" is better than no number.

"I can't get specific dollar amounts"
→ Describe the gap qualitatively, then note "cost not yet quantified but represents significant strategic risk."

"Leadership seems skeptical"
→ Ask what data would convince them. Then go get that specific data.

"This feels overwhelming"
→ Start with Day 1 (CRM losses). If that alone shows $200K+ in competitive blind spots, you might not need the rest.

# What Happens After Approval

Week 1-2: Vendor evaluation
- Use buyer's guide to identify platforms
- Schedule demos with top 3-5
- Check references

Week 3-4: Selection & negotiation
- Compare against requirements from your business case
- Negotiate contract
- Get legal/procurement involved

Month 2-3: Implementation
- Configure and integrate
- Migrate existing intelligence
- Train core team
- Pilot with key groups

Month 4+: Scale & optimize
- Organization-wide rollout
- Establish success metrics
- Measure against baseline
- Iterate based on feedback

You did it. You have a business case built on real data from your organization.

**Now go get that budget!**

**Download all templates**

**Schedule consultation**

**Read the buyer's guide**

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