

A Gartner G-Cloud 15 Service Definition for Cloud Consulting: Cloud Infrastructure — CRM Application Assessment

2026

Gartner G-Cloud 15 Service Definition

© 2026 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. This Gartner G-Cloud 15 Service Definition, including all supporting materials, is proprietary to Gartner, Inc. and/or its affiliates and is for the sole internal use of the intended recipients. Because this Gartner G-Cloud 15 Service Definition may contain information that is confidential, proprietary or otherwise legally protected, it may not be further copied, distributed or publicly displayed without the express written permission of Gartner, Inc. or its affiliates.

Gartner

Service Summary

Gartner will assess current CRM capabilities, benchmark them against best practice. Gartner will recommend how to achieve the desired state of CRM within the client organisation by comparing the existing CRM capabilities with a future-state vision informed by expert points of view of the current leading practices in CRM, providing options for implementation, and suggesting suitable providers/initiatives.

Service Description

Using Gartner's experts supported by best-in-class research, Gartner will conduct an independent evaluation of current CRM capabilities and supporting applications using business architecture methodologies, such as capability modelling and Gartner strategy frameworks, to identify improvement opportunities.

Gartner will also facilitate the development of a future-state CRM vision, leveraging expert research, industry best practices, case studies, and emerging technology trends. Gartner will compare the current state against the desired future state, highlighting capability gaps and opportunities to be addressed.

Options will be developed for the future based on Gartner application strategy frameworks, such as a full re-implementation or targeted incremental investment.

Using Gartner research and analysis, a list of potential options and candidate CRM suppliers or initiatives will be identified and appropriately scored with the organisation to determine the preferred strategy and approach.

Gartner will create a comprehensive roadmap for value realisation and deliver targeted recommendations to address common causes of programme underperformance, ensuring successful achievement of stated objectives.

Service Benefits

- Business outcome orientation ensures desired results are the primary focus
- Vendor-independent recommendations provide consideration of the most appropriate solutions
- Experienced practitioners leverage Gartner research frameworks for robust analysis
- Gartner research-backed vendor analysis accelerates delivery of actionable recommendations
- Options include net-new capability implementation/investment in existing solutions
- Recommendations help reduce implementation costs
- Accelerates delivery of actionable insights through proven analytical capabilities
- AI-powered analysis that augments Gartner's Insights and SME delivery experience

Service Features

- Data collection and stakeholder interviews to establish context and baseline the existing state
- Workshops and interviews to assess current CRM capabilities
- Capability analysis leveraging industry-leading frameworks to generate actionable insights
- Documentation of the current state of CRM capabilities and supporting technologies

- Development of a future-state vision informed by research and case-studies
- Identification of gaps between current and future state
- Scenarios development to achieve the target state, including options to replace, invest, or augment
- Collaborative scoring and prioritisation of scenarios and options
- Objective identification of vendors and initiatives aligned with target state capabilities
- Vendor-agnostic recommendations for engagement and solution selection
- Provision of a roadmap to realisation and procurement planning

Full List of Service Features

- Project planning — Gartner will identify required data, appropriate documentation and relevant stakeholders
- Interviews — Gartner will interview stakeholders and review documentation to provide an as-is view of the CRM capabilities' health
- Analysis — Using Gartner frameworks, analyse the data and provide current-state health assessment across business and technology
- Series of Workshops:
 - Presentation of current state analysis — issues and opportunities, and drive agreement on the core issues to be addressed
 - Facilitation of future state vision — using Gartner research, present both current best practices and innovative possibilities. Collaborate to refine and articulate the vision, translating it into the specific capabilities needed for success
 - Gartner will discuss and present options to achieve the future state strategic architecture, e.g., a single solution of multiple, based on the initial perspective on potential suppliers, their strengths, weaknesses, and success stories. Options that require investment in the existing solutions will be presented if feasible. A decision framework will be developed collaboratively, considering key success factors across technology architecture and business perspectives
 - Collaborative evaluation of strategic future options using a structured decision framework to identify and select the preferred solution
- Gap Analysis — Gartner will review the current state and target state and identify gaps between the current state and future state capabilities — considering options such as invest, replace, augment or do nothing
- Report — The target state and gaps between the current and target state will be described
- Presentation — Gartner will present a vendor-agnostic list of potential suppliers or strategic initiatives to fulfil the client vision, ranked in order of ability to meet client needs. Feedback will be sought on which supplier(s) or initiatives to consider for subsequent engagement
- Based on the feedback Gartner will refine the analysis for the key stakeholders and will include final recommendations and a roadmap to achieve the vision

Project Approach

- Phase 0: Kick-off, planning and stakeholder and documentation identification
- Phase 1: Stakeholder interviews and documentation review

- Phase 2: Analysis of current state CRM capabilities and presentation of current state issues and opportunities
- Phase 3: Development and delivery of future state vision workshop to inform and refine target state vision and required capabilities
- Phase 4: Gap analysis and target state report generation
- Phase 5: Workshops to present options to achieve target state, determine the scoring model, and collaboratively score
- Present the potential suppliers or initiatives to achieve the target state and an actionable roadmap to achieve the target state for the preferred option

Project Schedule

Gartner anticipates completion of this engagement within 8 — 10 weeks.