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CRM REQUIREMENTS

COMPANY	USERS	BUDGET PER USER / MONTH	DECISION BY	CURRENT SYSTEM

Tick the features you need and write M (must-have) or N (nice-to-have) on the line, with any detail.

CONTACTS AND PIPELINE

- ❑ Contacts linked to companies _____
- ❑ Custom fields _____
- ❑ Deal pipeline with stages _____
- ❑ Several pipelines _____
- ❑ Quotes and products _____
- ❑ Lead scoring _____

EMAIL AND CALENDAR

- ❑ Gmail / Outlook sync _____
- ❑ Email templates and tracking _____
- ❑ Meeting booking links _____
- ❑ Call logging / calling _____

MARKETING AND SERVICE

- ❑ Web forms to CRM _____
- ❑ Email campaigns _____
- ❑ Support tickets _____
- ❑ Customer portal _____

REPORTS AND AUTOMATION

- ❑ Sales dashboards _____
- ❑ Forecasting _____
- ❑ Task reminders and sequences _____
- ❑ Workflow automation _____

INTEGRATIONS

- ❑ Accounting (QuickBooks, Xero) _____
- ❑ Website / ecommerce _____
- ❑ Chat (Slack, Teams) _____
- ❑ API / Zapier _____

ADMIN, SECURITY, DATA

- ❑ User roles and permissions _____
- ❑ Single sign-on, MFA _____
- ❑ Data import from current system _____
- ❑ Full data export _____
- ❑ Mobile app _____
- ❑ Data hosted in US / EU _____