

Poor Example

CRM SYSTEM REQUIREMENTS

Company XYZ - Requirements Specification

EXECUTIVE SUMMARY

We need a new CRM system with all the latest features and capabilities to replace our outdated system.

FUNCTIONAL REQUIREMENTS

MUST HAVE FEATURES

- ☐ 360-degree customer view
- ☐ AI-powered insights
- ☐ Advanced analytics dashboard
- ☐ Mobile accessibility
- ☐ Cloud-based architecture
- ☐ Real-time synchronization
- ☐ Automated workflows
- ☐ Lead scoring capabilities
- ☐ Email marketing integration
- ☐ Social media monitoring
- ☐ Predictive analytics
- ☐ Machine learning algorithms
- ☐ Omnichannel support
- ☐ Advanced reporting suite
- ☐ Customizable fields (unlimited)
- ☐ API connectivity
- ☐ Third-party integrations
- ☐ Document management
- ☐ Task automation
- ☐ Calendar synchronization
- ☐ Bulk data import/export
- ☐ User permission controls
- ☒ Audit trail functionality
- ☐ Backup and recovery
- ☐ Multi-language support
- ☐ Multi-currency support
- ☐ Geolocation tracking
- ☐ Voice recording integration
- ☐ Video conferencing integration
- ☐ Knowledge base integration
- ☐ Survey tools
- ☐ Quote generation
- ☐ Proposal management
- ☐ Contract management
- ☐ Invoice generation
- ☐ Payment processing
- ☐ Inventory management
- ☐ Order management

- ☐ Shipping integration
- ☐ Customer portal
- ☐ Vendor portal
- ☐ Partner portal
- ☐ White-label capabilities
- ☐ Custom branding
- ☐ Advanced security features
- ☐ Single sign-on (SSO)
- ☐ Two-factor authentication

- ☐ GDPR compliance
- ☐ HIPAA compliance
- ☐ SOX compliance
- ☐ ISO certification
- ☐ 24/7 customer support
- ☐ Training materials
- ☐ Implementation services
- ☐ Data migration services

NICE TO HAVE FEATURES

- Chatbot functionality
- Advanced AI features

TECHNICAL SPECIFICATIONS

SYSTEM REQUIREMENTS

- Must be web-based
- Must work on all devices
- Must be fast
- Must be secure
- Must be scalable
- Must be reliable
- Must be user-friendly
- Must have a modern interface
- Must support all browsers
- Must work offline
- Must have unlimited storage
- Must have 99.99% uptime
- Must have enterprise-grade security
- Must support unlimited users
- Must support unlimited customization

INTEGRATION REQUIREMENTS

- Must integrate with everything
- Must have pre-built connectors

- Must support custom integrations
 - Must work with our existing systems (TBD)
 - Must not require IT involvement
 - Must be plug-and-play ready
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VENDOR REQUIREMENTS

COMPANY CRITERIA

- Must be an established vendor (over 20 years)
- Must have local presence
- Must provide 24/7/365 support
- Must offer free training
- Must be cost-effective

PROPOSAL REQUIREMENTS

Vendors must provide:

- Detailed feature comparison matrix
 - Complete technical architecture diagram
 - Implementation timeline
 - Training schedule for all staff
 - Data migration plan for all systems
 - Customization roadmap
 - Integration specifications
 - Security audit results
 - Performance benchmarks
 - Cost breakdown (no hidden fees)
 - 5-year TCO analysis
 - ROI projections
 - Reference list (minimum 4 clients)
 - Demo environment access
 - Proof of concept proposal
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EVALUATION CRITERIA

SCORING MATRIX

- Features (50%)
- Price (30%)
- Vendor reputation (10%)
- Implementation speed (10%)

SELECTION PROCESS

1. All vendors must demonstrate every feature listed
 2. Vendors must provide fixed-price quotes
 3. Implementation must begin within 30 days
 4. The system must be fully operational within 6 months
 5. Data migration must be completed with zero downtime
 6. All integrations must work on day one
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BUDGET AND TIMELINE

BUDGET

- Looking for the best value solution
- Need competitive pricing
- Must fit within allocated budget (amount TBD)
- No additional costs after implementation

TIMELINE

- RFP responses due: N weeks
 - Vendor demos: N weeks
 - Decision: N weeks
 - Implementation start: N weeks
 - Go-live: N weeks
 - Full adoption: N weeks
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SUCCESS METRICS

- The system is implemented on time and on budget
- All features work as demonstrated
- Users are satisfied with the new system
- Productivity increases immediately
- Sales increase by x in the first quarter

- Customer satisfaction improves
 - ROI achieved within 6 months
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ADDITIONAL REQUIREMENTS

- The system must be future-proof
 - Must support emerging technologies
 - Must adapt to changing business needs
 - Must require minimal maintenance
 - Must be intuitive for all users
 - Must eliminate all current pain points
 - Must be the last CRM we ever need to buy
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This document represents our complete requirements. Vendors unable to meet all specifications need not apply.

DO NOT USE