

SoftwareGlimpse CRM Requirements Template

Updated: 15 Aug 2026

Project / CRM: _____
Owner / Team: _____
Date: _____

Define what your CRM must do before you shortlist.

HOW TO USE THIS RESOURCE

- 1 Capture context
- 2 Write the stage model
- 3 List capability rows
- 4 Add constraints & data
- 5 Write acceptance checks
- 6 Freeze & hand off

Key: ☐ Pass ☐ Partial ☐ Fail ☐ Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT
1. BUYING CONTEXT & SCOPE					
1.1	Team, motion, and objects in scope	Every later row depends on how you sell and which CRM objects are day one.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Where contacts and deals live today	Migration effort and import risk come from your current systems, not the new one.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Top three operational pains	Keeps requirements tied to problems instead of feature envy.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Explicit out of scope for phase one	Prevents demo scope creep into marketing automation or custom objects.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. PIPELINE, STAGES & OWNERSHIP					
2.1	Pipeline stage model written down	Stages are the spine of every later demo test and scorecard row.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Owner and dated next step on open deals	Unowned deals and missing next steps are the most common CRM failure.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Required deal fields kept short	Long required-field lists get bypassed and wreck reporting.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Multiple pipelines or motions	Independent stage sets change which editions and products qualify.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Won-deal and renewal handoff	Post-sale scope is where phase-one budgets quietly double.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. CONTACTS, ACTIVITIES & EMAIL/CALENDAR					
3.1	Contact and account data you will maintain	A taxonomy nobody maintains produces reports nobody trusts.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Activity logging expectations	Activity on the record is what makes the CRM the system of record.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.3	Email and calendar requirement stated precisely	"Email integration" means very different things per product and edition.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.4	Mobile and inbound routing needs	Field updates and lead assignment are common hidden must-haves.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
4. REPORTING, SEATS & ADMIN CAPACITY					

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
4.1	Weekly review views you need	If the weekly board needs an export, the CRM is not doing its job.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	Forecast or commit reporting need	Forecast features are often edition-locked and change the price band.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Seat and edition constraints	A must-have on an edition you will not buy is a fail, not a detail.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	Admin capacity constraint	Someone must own users, fields, stages, and hygiene every single week.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. CONSTRAINTS, INTEGRATIONS & DATA						
5.1	Integrations that must work on day one	Day-one integrations eliminate options faster than missing features.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Import sources and known data mess	Import realism decides whether go-live slips by a week or a quarter.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Export and exit requirement	You should be able to leave with contacts, deals, and activity history.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Security baseline you truly require	Over-asking stalls the buy; under-asking blocks rollout at the last minute.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Budget posture without invented totals	Cost clarity is a requirement; a made-up total cost of ownership is not.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6. PRIORITY, ACCEPTANCE & FREEZE						
6.1	Every row tagged must / should / nice	Untagged rows become silent must-haves during demos.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.2	Must-have count capped	If everything is a must, no vendor can pass and no tradeoff is visible.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.3	Acceptance check written for every must-have	A must-have with no check cannot be tested in a demo or scored later.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.4	Parking lot created for deferred wishes	Good ideas need somewhere to live that is not the must-have column.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.5	Sign-off and change log started	A frozen, dated sheet is what keeps later evaluations comparable.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Completion guidance

Pass = done with evidence. Partial = in progress.
Fail = blocked. Not tested = deferred on purpose.

Evidence matters

Note owners, dates, and proof in Evidence /
Notes so handoffs stay clear.

Work top to bottom

Finish must-have (*) rows before nice-to-haves.
Do not invent a Pass without proof.