SoftwareGlimpse

CRM REQUEST FOR PROPOSAL

Structured vendor response template for CRM selection

RFP WORKBOOK · Vendor-facing · Not a Pass/Fail checklist · Updated 15 Aug 2026 · Excel is the response workbook

Buyer / organisation: ____________________ RFP reference: ____________________

Project name: ____________________ Issue date: ____________________

Primary contact: ____________________ Contact email: ____________________

Vendor invited: ____________________

RFP AT A GLANCE (LEAVE BLANK — FILL FROM EXCEL)

MUST-HAVE ROWS	SHOULD-HAVE ROWS	VENDORS INVITED	RESPONSE DUE

PURPOSE

Issue one comparable package to every shortlisted CRM vendor. Require written answers in the response table (Excel is the primary response workbook). Score returned answers on your Vendor Scorecard — do not compare sales decks.

VENDOR RESPONSE DEADLINE

Questions deadline: ____________________ Response due date: ____________________

Demo window: ____________________

SELECTION WORKFLOW

Requirements !’ RFP !’ Responses !’ Demo !’ Scorecard !’ Decision

Excel is the primary response workbook. Complete buyer context and freeze requirements before issuing. Leave glance counters and commercial tables blank until your project data is known — do not invent seat counts, TCO, or a current CRM.

01 Instructions to vendors

Follow these rules so every vendor response can be compared side by side.

HOW TO RESPOND

1. Use the Excel response workbook

Complete every required sheet. Decks are appendix only — they do not replace the table.

2. Answer every requirement row

Provide a short vendor response, a Delivery method, the edition / add-on, and evidence (docs, trial path, or named module).

3. One delivery method per row

Pick Native, Configuration, Custom, Partner, Roadmap, or Not supported. Roadmap on a MUST HAVE is treated as a gap.

4. Cite verifiable evidence

Name the edition and how a non-admin verifies the capability in a trial or sandbox.

5. Shared clarifications

Material clarifications are shared with every invited vendor. Ask by the published questions deadline.

6. Identical package

All vendors receive the same brief, dates, and response format. Do not rely on private side conversations.

DELIVERY METHOD LEGEND

Native	Configuration	Custom	Partner	Roadmap	Not supported

Allowed values align with the Excel workbook: Native · Configuration · Custom · Partner / Third party · Roadmap · Not supported. Use N/A only when the row is out of scope for your product.

This is a vendor response template — not a Pass/Fail checklist. Buyers evaluate completeness and gaps after submission; vendors should not self-score Pass / Partial / Fail.

02 Company & project context

Buyer completes before issue. Leave fields blank in this PDF until known — do not invent company facts.

ORGANISATION OVERVIEW

What you sell, go-to-market motion, and the CRM job (owned pipeline, logged activity, usable forecast…):

CURRENT STATE (OPTIONAL)

Current tools / CRM (if any), known pain points, and why you are buying now:

PROJECT DRIVERS

Business drivers, constraints, and success definition for phase one:

KEY CONTACTS

ROLE	NAME	EMAIL	NOTES
Executive sponsor			
Ops / CRM owner			
IT / Security			
Procurement			

CONFIDENTIALITY — This RFP and any vendor response may contain confidential commercial and operational information. Recipients must not share outside parties required to prepare a response. Buyers: remove any internal-only pages (final page) before sending to vendors.

03 Business objectives & scope

BUSINESS OBJECTIVES

SAMPLE rows below — replace with your signed objectives before issue

ID	OBJECTIVE	SUCCESS MEASURE	PRIORITY
OBJ-01	SAMPLE — Single source of truth for accounts, contacts, and open deals	SAMPLE — ______% of sellers updating weekly	MUST
OBJ-02	SAMPLE — Management forecast from CRM without spreadsheet rebuild	SAMPLE — Forecast board used in ______ review	MUST
OBJ-03			
OBJ-04			

IN SCOPE (PHASE ONE)

Objects, teams, regions, and capabilities in day-one scope:

OUT OF SCOPE / LATER

Explicit exclusions and phase-two candidates:

DELIVERY PHASES

PHASE	FOCUS	TARGET WINDOW	NOTES
Discover	Requirements freeze + RFP issue		
Select	Responses !' demo !' scorecard		
Implement	Configure, migrate, train, go-live		
Adopt	Hypercare + optimisation		

04 Users & operating model

Seat bands drive comparable quotes. Leave counts blank until known — SAMPLE structure only.

USER GROUPS

SAMPLE

USER GROUP	PRIMARY JOBS	SEAT BAND	ACCESS LEVEL	NOTES
SAMPLE — Sellers	Own pipeline, log activity, advance deals		Full CRM	
SAMPLE — Managers	Forecast, coach, approve discounts		Team + reports	
SAMPLE — Ops / Admin	Configure fields, users, integrations		Admin	
SAMPLE — View-only	Read pipeline / account context		Read-only	

REGIONS & LANGUAGES

Regions in scope, languages required, and any local compliance notes:

GROWTH ASSUMPTIONS (BLANK)

HORIZON	USERS (BAND)	RECORDS / VOLUME	NOTES

Do not invent seat counts or growth percentages in this PDF. Vendors price to the bands you publish in Excel.

05 Functional requirements (1/2)

SAMPLE rows from the SoftwareGlimpse requirements module (CRM-REQ-001…). Replace with your signed must-haves before issue. Vendor response, Delivery method, Edition, and Evidence stay blank for the vendor.

SAMPLE — teaching rows only · Delivery: Native / Configuration / Custom / Partner / Roadmap / Not supported

ID	CATEGORY	REQUIREMENT	PRIORITY	VENDOR	DELIVERY	EDITION	EVIDENCE
CRM-REQ-001	Pipeline & forecasting	SAMPLE — Configure multiple sales processes / pipelines with independent stages and stage rules on the quoted edition.	MUST HAVE				
CRM-REQ-002	Sales automation	SAMPLE — Automate lead follow-up tasks and reminders without requiring admin intervention for every lead.	MUST HAVE				
CRM-REQ-003	Security & access	SAMPLE — Restrict record access by team / role so sellers only see authorised accounts and deals.	MUST HAVE				
CRM-REQ-004	Pipeline & forecasting	SAMPLE — Produce a management forecast from CRM pipeline data without rebuilding the board in a spreadsheet.	MUST HAVE				
CRM-REQ-005	Core CRM	SAMPLE — Track client interactions (calls, meetings, notes) on the contact and account timeline.	MUST HAVE				
CRM-REQ-006	Core CRM	SAMPLE — Create and manage custom fields on core objects without a vendor ticket for each change.	SHOULD HAVE				

05 Functional requirements (2/2)

Continuation of SAMPLE functional rows. Blank rows at bottom for your additions.

ID	CATEGORY	REQUIREMENT	PRIORITY	VENDOR	DELIVERY	EDITION	EVIDENCE
CRM-REQ-007	Commercial / multi-currency	SAMPLE — Support multiple deal currencies with a documented rollup / reporting approach.	COULD HAVE				
CRM-REQ-008	Communication	SAMPLE — Integrate with company email so activity can sync to the correct CRM records on the quoted edition.	MUST HAVE				
CRM-REQ-009	Security & access	SAMPLE — Support SSO for named user access on the quoted edition.	SHOULD HAVE				
CRM-REQ-010	Security & access	SAMPLE — Provide auditability of user activity / admin changes suitable for access reviews.	SHOULD HAVE				
REQ-CRM-011	Reporting & analytics	SAMPLE — Build and share operational dashboards without exporting to a spreadsheet for the weekly review.	MUST HAVE				
REQ-CRM-012	Data & exit	SAMPLE — Export contacts, deals, and activities in a documented format the buyer can re-import elsewhere.	MUST HAVE				

Blank rows for buyer-added requirements (not samples):

06 Technical & integrations

TECHNICAL REQUIREMENTS (SAMPLE)

ID	CATEGORY	REQUIREMENT	PRIORITY	VENDOR	DELIVERY	EDITION	EVIDENCE
REQ-TECH-001	Technical & integration	SAMPLE — Provide documented REST APIs (or equivalent) for reading and writing core CRM objects.	MUST HAVE				
REQ-TECH-002	Technical & integration	SAMPLE — Support webhooks or equivalent event notifications for key record changes.	SHOULD HAVE				

SYSTEM INTEGRATION MATRIX (BLANK SYSTEMS)

List systems you need connected. Leave vendor cells blank for response in Excel.

SYSTEM	PURPOSE	DIRECTION	MUST?	VENDOR APPROACH	EDITION / ADD-ON
	Email / calendar	Bi-di			
	Marketing automation				
	Billing / ERP				
	Support / ticketing				
	Data warehouse / BI				

Marketplace listings alone are not evidence. Ask vendors to name the connector, edition gate, and who maintains it.

07 Data migration & security

MIGRATION OBJECTS (BLANK)

OBJECT	IN SCOPE?	APPROX. VOLUME	HISTORY DEPTH	VENDOR APPROACH	LIMITATIONS
Contacts					
Accounts / companies					
Deals / opportunities					
Activities					
Custom objects					

MIGRATION REQUIREMENT (SAMPLE)

ID	CATEGORY	REQUIREMENT	PRIORITY	VENDOR	DELIVERY	EDITION	EVIDENCE
REQ-MIG-001	Data migration	SAMPLE — Describe migration tooling, validation approach, and limitations for historical activities/attachments.	MUST HAVE				

SECURITY & PRIVACY QUESTIONS (SAMPLE)

ID	CATEGORY	REQUIREMENT	PRIORITY	VENDOR	DELIVERY	EDITION	EVIDENCE
REQ-SEC-001	Security & privacy	SAMPLE — Support MFA for administrative and/or user access on the quoted edition.	MUST HAVE				
REQ-SEC-002	Security & privacy	SAMPLE — Document data residency options and subprocessors relevant to customer CRM data.	SHOULD HAVE				

Detailed diligence belongs on your Security Checklist. Here: ask only what blocks shortlist or contract. Leave vendor response cells blank for Excel.

08 Implementation, training & support

PROPOSED TIMELINE (BLANK)

MILESTONE	TARGET DATE	OWNER	VENDOR DEPENDENCY
Kick-off			
Design / config freeze			
Pilot / UAT			
Training complete			
Go-live			
Hypercare end			

TRAINING PLAN ASKS

AUDIENCE	FORMAT	INCLUDED?	VENDOR RESPONSE	COST (IF ANY)
Admins				
Managers				
End users				
Train-the-trainer				

SUPPORT MODEL

TOPIC	BUYER QUESTION	VENDOR RESPONSE
Support hours / SLA	Business hours, channels, response targets?	
Named CSM / partner	Who owns escalation after go-live?	
Success / admin hours	Included hours vs billable?	
Community / docs	Self-serve resources available?	

09 Commercial & pricing

All amount cells blank. Vendors complete in Excel using your seat bands — do not invent list prices or TCO.

SOFTWARE LICENCES

LINE ITEM	EDITION	SEATS	UNIT PRICE	ANNUAL
Seller seats				
Manager seats				
View-only / light				
Admin / extra				

ADD-ONS & USAGE

ADD-ON	INCLUDED?	LIMIT	OVERAGE	ANNUAL
Automation / workflows				
Storage				
API / sync				
AI / credits				

IMPLEMENTATION & SERVICES

SERVICE	INCLUDED?	DAYS / HOURS	FEE	NOTES
Implementation package				
Data migration				
Training				
Custom development				

RECURRING SUPPORT / SUCCESS

ITEM	TIER	INCLUDED	ANNUAL FEE	NOTES
Standard support				
Premium support				
Success / CSM				

3-YEAR TCO SUMMARY (BLANK)

YEAR	SOFTWARE	ADD-ONS	SERVICES	SUPPORT	TOTAL
Year 1					
Year 2					
Year 3					
3-year total					

Currency: ________ Payment terms: ________ Quote validity: ________ No invented totals — roll up from Excel after quotes return.

10 Vendor profile, roadmap & risks

VENDOR PROFILE

Company overview, relevant CRM customer segment, implementation model (direct / partner), and named response owner:

PRODUCT ROADMAP (RELEVANT TO THIS RFP)

CAPABILITY	STATUS	TARGET WINDOW	IMPACT ON MUST-HAVES

ASSUMPTIONS

State assumptions about buyer environment, data quality, seats, and scope:

EXCEPTIONS

List requirement IDs you cannot meet as stated, and the proposed alternative:

RISKS & MITIGATIONS

RISK	LIKELIHOOD	IMPACT	MITIGATION

11 Vendor declaration & submission

RESPONSE SUMMARY (BLANK)

METRIC	COUNT / VALUE	NOTES
Must-have rows answered		
Must-haves marked Not supported		
Must-haves marked Roadmap		
Custom / Partner rows		
Exceptions listed		
Quoted edition(s)		

SUBMISSION CHECKLIST

- ☐ Excel response workbook completed
- ☐ Delivery method set on every row
- ☐ Commercial tables completed
- ☐ Evidence links / doc references included
- ☐ All must-have rows answered
- ☐ Edition / add-on named where gated
- ☐ Assumptions & exceptions attached
- ☐ Appendix decks labelled as appendix only

VENDOR DECLARATION

I confirm that the information in this response is accurate to the best of my knowledge, that Delivery method and edition claims reflect the quoted configuration, and that roadmap items are clearly labelled as Roadmap (not day-one capability).

Authorised signatory: ____________________ Title: ____________________

Company: ____________________ Date: ____________________

Signature: ____________________

Submit via the channel named on the cover by the response due date. Late or incomplete packages may be excluded from scoring without further notice.

INTERNAL — DO NOT SEND TO VENDOR

Buyer evaluation only. Remove this page before issuing the RFP package.

Buyer evaluation checklist

COMPLETENESS CHECK

- ☐ All required sections returned
- ☐ Must-have rows fully answered
- ☐ Delivery methods present
- ☐ Edition gates named
- ☐ Commercial tables usable
- ☐ Exceptions / assumptions clear

GAP REVIEW

Must-have gaps, Roadmap-as-day-one claims, missing evidence, commercial red flags:

NEXT STEP (TICK ONE)

☐ Reject ☐ Clarification ☐ Demo ☐ POC ☐ Scorecard

Rationale / owners / dates for the next step:

HANDOFF LINKS

Vendor Scorecard

Map written answers onto weighted criteria with evidence confidence.

Decision Matrix

Final TCO / risk / selection after scorecard and demos.

Related: /resources/crm-vendor-scorecard/ · /resources/crm-decision-matrix/ · Excel remains the response workbook for comparable answers.