

CRM Requirements	PRIORITY 1 = Essential 2 = Important 3 = Optional	1 = Included 2 = Available at extra cost 3 = Requires additional product 4 = Custom development	Company-specific requirements/notes
GENERAL REQUIREMENTS			
Role-based personalization			
Customized workflows			
Multichannel support (specify)			
Customizable dashboards			
Customizable reports			
Customizable data fields			
Integration with ERP applications (specify)			
Mobile support (specify supported platforms)			
Other:			
SALES FORCE AUTOMATION			
Contact management			
Calendar integration			
Email/meeting reminders			
Route planning and assistance			
Lead assignment and routing			
Team collaboration			
Automated quote/proposal generation			
Customize sales stages/cycles			
Business partner management			
Territory management			
Sales forecasting			
Phone integration			
Other:			
MARKETING AUTOMATION			
Campaign management and analysis			
Email list management			
Social media integration (specify)			
Multichannel campaigns (specify)			
Event marketing			
Website lead capture			
Lead scoring			
Other:			
CUSTOMER SERVICE AND SUPPORT			
Case management			
Call center automation			
Integration with sales, inventory, payment data			
Self-service portal			
Online knowledge base creation			
Shared calendars			
Scenario automation			
Collaboration tools			
Required product integrations (specify)			
Other:			
SYSTEM REQUIREMENTS			
Role-based access			
Data encryption			
Two-factor authentication			
Cloud-based			
Access tracking			
Migration of existing data (details required)			
Other:			