Define your CRM project

A practical, fillable planning template for business goals, CRM requirements and implementation decisions.

HOW TO USE THIS WORKBOOK

Complete the fields digitally or print and write. Select one priority per requirement: Must = essential at launch; Should = valuable if feasible; Later = a future phase; N/A = not applicable. Save a copy before sharing.

01 Company & project overview

Company name

Website

Industry

Employees / expected CRM users

Project owner / role

Target launch date

Current CRM and other core systems

Departments and decision-makers involved

02 Project direction

- [ ] New CRM implementation
- [ ] Migration from another CRM
- [ ] Improve an existing CRM

Top priority: what must this project change for your business?

Goals, workflow & success

Start with the business outcome, then describe the process your CRM needs to support.

03 Business goals

Goal 1: current problem and desired outcome

Success measure / target

Goal 2: current problem and desired outcome

Success measure / target

Goal 3: current problem and desired outcome

Success measure / target

04 Your lead-to-customer workflow

Lead sources and assignment rules

Qualification criteria

Sales stages and required approvals

After a win: handoff, onboarding and ownership

Key exceptions, bottlenecks or process constraints

Core CRM requirements

Prioritize requirements by business need. Use notes to capture a use case, constraint or requirement ID.

05 Contacts, leads & sales

Requirement	Must	Should	Later	N/A	Notes / reference
Contact and account management	☐	☐	☐	☐	
Custom fields and record layouts	☐	☐	☐	☐	
Contact segmentation and tagging	☐	☐	☐	☐	
Lead capture and assignment	☐	☐	☐	☐	
Lead qualification / scoring	☐	☐	☐	☐	
Opportunity and pipeline management	☐	☐	☐	☐	
Multiple sales pipelines	☐	☐	☐	☐	
Tasks and follow-up reminders	☐	☐	☐	☐	
Email and calendar connection	☐	☐	☐	☐	
Sales activity history	☐	☐	☐	☐	
Quotes, orders and approval workflows	☐	☐	☐	☐	
Mobile CRM access	☐	☐	☐	☐	

Describe your most important sales use case

Other core requirement / limitation

Automation & customer experience

Document the triggers, team handoffs and customer interactions that matter most.

06 Automation, marketing & support

Requirement	Must	Should	Later	N/A	Notes / reference
Workflow rules and notifications	☐	☐	☐	☐	
Lead routing and escalation	☐	☐	☐	☐	
Approval processes	☐	☐	☐	☐	
Campaign and lead-source tracking	☐	☐	☐	☐	
Email nurturing and segmentation	☐	☐	☐	☐	
Consent / communication preferences	☐	☐	☐	☐	
Support ticket management	☐	☐	☐	☐	
Knowledge base / self-service	☐	☐	☐	☐	
Live chat and customer feedback	☐	☐	☐	☐	

07 Describe an automation

When this happens... (trigger)

The CRM should... (action and conditions)

Notify / assign to... (owner and exception handling)

Integrations & migration

Record what needs to connect, what needs to move and who will validate the result.

08 Integration requirements

For each connection, include the system name, data exchanged, sync direction and frequency.

Integration 1: system / data / direction / frequency / priority

Integration 2: system / data / direction / frequency / priority

Integration 3: system / data / direction / frequency / priority

09 Data migration planning

Source systems and approximate record volumes

Record types, history and attachments to retain

Known duplicates, missing data or cleanup needs

Mapping / validation owner and cutover window

Migration acceptance criteria: how will you verify a successful move?

Delivery & Zoho planning

Confirm reporting, access and rollout needs before agreeing the implementation scope.

10 Reporting, security & solution discovery

Dashboards, KPIs and reporting audiences

Roles, permissions and restricted information

Security, retention, data-location or compliance needs

Existing Zoho apps / needs for consultant review

Discovery note: product fit, subscription editions, integration feasibility and regulatory requirements must be verified before scope approval.

11 Budget & rollout

Currency / software subscription budget

Implementation / configuration budget

Migration / integration / development budget

Training / ongoing support budget

Phase-one scope, testing owner and final approver

Training needs, launch dependencies and open questions

Turn requirements into a clear plan.

Share your completed checklist with ZillTech to discuss your workflows, priorities and next steps for a tailored Zoho solution.

Discuss your CRM requirements

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