



Sample CRM Requirements Specification

8 August 2025

1.0



Document Information

Version Control

Date	Author	Version	Notes
10 August 2025	Nickbeau	1.0	Initial Document Creation

Table of Contents

- Document Information 2
 - Version Control..... 2
- Overview 4
- Core Features 5
 - Lead and Opportunity Management 5
 - Contact and Account Management 5
 - Sales Pipeline Tracking..... 5
 - Quote and Order Management..... 5
 - Customer Service and Support Ticketing 6
 - Reporting and Analytics..... 6
 - Task and Activity Tracking 6
- Integration Requirements..... 8
 - ERP Integration (Inventory & Production)..... 8
 - Accounting Software Integration 8
 - Marketing Tools Integration 8
- Technical Requirements 10
 - Cloud-Based Deployment with Mobile Access 10
 - Role-Based Access Control (RBAC) 10
 - Scalable Architecture..... 10
 - Data Import and Export Capabilities 11
 - API Availability for Third-Party Integration..... 11
- Usability Requirements..... 12
 - Intuitive UI/UX for Non-Technical Users 12
 - Customisable Dashboards and Fields 12

Workflow Automation.....	12
Compliance and Security.....	14
Data Privacy Compliance (GDPR and Australian Regulations).....	14
Audit Logs and User Activity Tracking.....	14
Data Encryption (In Transit and At Rest)	15

Overview

This document defines the requirements for a Customer Relationship Management (CRM) system tailored to a medium-sized manufacturing organisation. The CRM will serve as a central platform to support customer-facing processes across sales, customer service, and production planning departments. It is intended to be industry-generic (not tied to a specific manufacturing niche) so that it can address common needs in manufacturing such as managing leads, sales pipelines, customer accounts, orders, and after-sales support. Implementing such a CRM will help the company enhance sales and service operations, coordinate order management with production, and build stronger relationships with customers and partners.

The specification details the core functionality required, integration points with other enterprise systems, technical and usability requirements, and compliance and security standards. The CRM system must accommodate the firm's growth, provide a user-friendly interface for non-technical staff, and comply with relevant data protection regulations in Australia and internationally. All requirements are outlined in a formal manner below for technical and managerial review.

Core Features

The CRM system shall include the following core features to support the manufacturing firm's customer relationship processes:

Lead and Opportunity Management

Capture and track leads from various sources (e.g. web enquiries, trade shows, referrals) and manage them through qualification into sales opportunities. The system shall allow sales staff to record lead details, qualify prospects, and convert leads to opportunities with associated potential revenue. Users can monitor each opportunity's status and progression, with tools for prioritising high-potential leads (e.g. lead scoring) and forecasting sales to improve conversion rates. This module ensures that no leads are lost and that sales teams can efficiently nurture prospects through the sales cycle.

Contact and Account Management

Maintain a unified repository of all customer and partner contacts and accounts. The CRM will store key information for each account (organisation name, addresses, industry, etc.) and related contacts (individual names, titles, contact details) along with a history of interactions. All communication history (emails, calls, meeting notes) should be easily logged and accessible in one place. This provides transparency and a 360-degree view of each customer relationship. The system should also support document storage (e.g. proposals, contracts, technical specifications) linked to accounts or opportunities. By having comprehensive account and contact profiles, sales and support teams can quickly retrieve context on any customer or partner.

Sales Pipeline Tracking

Provide tools to visualise and manage the sales pipeline across all stages of the sales process. The CRM should define configurable sales stages (e.g. Prospecting, Qualification, Quotation, Negotiation, Closed Won/Lost) and allow opportunities to be moved through these stages. Sales teams will have a transparent view of the entire pipeline, enabling them to track deals at each stage, monitor progress, identify bottlenecks, and allocate resources accordingly. Pipeline views (such as kanban boards or funnel charts) and real-time pipeline metrics should be available to sales managers for forecasting and performance monitoring. The system should also allow setting pipeline targets and provide alerts if deals are stagnating in a stage beyond a threshold, supporting proactive pipeline management.

Quote and Order Management

Enable the sales team to create professional quotations for customers and manage sales orders within the CRM. Users should be able to generate quotes including product details and pricing, submit them for approval if required, and then convert approved quotes into

orders. The system must track the status of quotes and orders (e.g. pending, approved, fulfilled) and integrate with production/ERP systems to reflect inventory availability and production schedules. By integrating order information and status tracking in one platform, the CRM ensures seamless communication between the sales team and production/fulfilment teams. This includes notifying production planners of new orders and providing sales with updates on order fulfilment progress. Order management features may also handle basic invoicing or order confirmation documents, or otherwise pass those to the integrated accounting system (see Integration Requirements).

Customer Service and Support Ticketing

Provide a module for customer support and after-sales service management. Customers or employees should be able to log support tickets or cases (for issues like product defects, service requests, or complaints), which are tracked through to resolution. The CRM must allow support agents to assign cases, set priorities, record communications with the customer, and escalate issues when necessary. Features like SLA tracking (to ensure timely responses) and email notifications to customers about case updates are expected. The system should support related processes such as managing product returns (RMAs) or warranty claims, including capturing necessary details and authorisations. Efficient case management will improve customer satisfaction by speeding up issue resolution. A self-service web portal for customers (to log tickets or check status) and a knowledge base for common issues would be desirable, though not mandatory.

Reporting and Analytics

Offer robust reporting tools and analytics dashboards to inform decision-making. Users should be able to generate reports on key metrics such as sales performance, pipeline status, lead conversion rates, customer service responsiveness, and order volumes. The CRM must include customisable dashboards where managers can view real-time KPIs for sales, support, and other departments. These analytics should enable trend analysis and sales forecasting, helping management identify growth opportunities and anticipate demand. For example, sales forecast reports by product line can be used to **optimise** production planning and inventory management to prevent overproduction or stockouts. Real-time analytics and reporting features support data-driven decisions and highlight areas for improvement. The system should also allow scheduling of routine reports (e.g. a weekly sales dashboard email) and provide export of reports to common formats.

Task and Activity Tracking

Provide tools for scheduling and tracking activities to ensure follow-through on all customer and prospect interactions. Users (sales reps, support agents, etc.) should be able to create tasks and reminders (calls, meetings, follow-up emails) and associate them with specific contacts, opportunities, or accounts. The system shall support

assigning tasks to team members and setting due dates, with notifications or alerts for upcoming deadlines. Integration with calendar systems (e.g. Outlook or Google Calendar) is desirable so that meetings and calls are synchronised and visible on users' calendars. By tracking tasks and activities in the CRM, nothing falls through the cracks – for instance, sales representatives can be reminded to follow up on quotes, and support teams can log and complete customer calls or maintenance visits. The CRM may also include workflow automation to create tasks or alerts based on triggers (for example, automatically schedule a follow-up call when a new lead is added). These features help improve productivity and ensure consistent customer engagement.

Integration Requirements

To **maximise** efficiency and data consistency across departments, the CRM system must integrate with other key software used by the firm. Important integration requirements include:

ERP Integration (Inventory & Production)

The CRM shall integrate with the company's Enterprise Resource Planning (ERP) system to synchronise data related to inventory, production, and orders. This integration ensures that customer-facing teams have visibility into stock levels, production schedules, and order fulfilment status, while production planners can see upcoming demand from the CRM's sales pipeline. For example, when a sales order is entered in the CRM, the ERP should be automatically updated to reflect the order for production planning, and any changes in inventory or production status in the ERP should be reflected back in the CRM. This harmonisation of CRM with manufacturing processes (coordinating order management and production management) is crucial for aligning sales commitments with operational capacity. The integration may be achieved via standard connectors or APIs, and should support real-time or scheduled data syncing to keep information up to date.

Accounting Software Integration

The CRM must connect with the accounting/bookkeeping system (e.g. Xero, MYOB, QuickBooks) to share customer and transaction data. Key integration points include the ability to generate invoices or bills from CRM orders and push them to the accounting system, as well as to pull financial information (like invoice status, payment records, account balance) into the CRM for a complete customer view. This avoids double data entry and ensures sales, finance, and support teams are all working with consistent information. For instance, when a quote is marked as "Closed-Won" in the CRM, it should be possible to automatically convert it into an invoice in the accounting software. Similarly, if a payment is recorded in the accounting system, the CRM should mark the corresponding invoice as paid. Such integration allows the CRM to fill in purchase orders, invoices, and contracts with customer data from the CRM, track invoice payment statuses, and even create financial reports based on sales orders, supporting an efficient quote-to-cash process.

Marketing Tools Integration

The CRM should integrate with marketing automation and email marketing platforms (e.g. campaign management tools like MailChimp, marketing automation like Marketo or HubSpot) to ensure leads and customer interactions are unified. This includes syncing contact lists and lead data between the CRM and marketing tools so that marketing campaigns use up-to-date CRM information and new leads from marketing campaigns

(web forms, landing pages, etc.) flow directly into the CRM. Integration with marketing software enables targeted, personalised marketing by using the rich customer data in the CRM (e.g. purchase history, preferences, segment membership) to trigger automated campaigns. The CRM should track marketing campaign interactions (such as email opens, click-throughs, form submissions) at the contact or lead record level, allowing sales and marketing teams to coordinate efforts and see the full engagement history. Overall, this integration ensures that the marketing department and the CRM share a single source of truth on prospects and customers, improving lead nurturing and campaign ROI.

Technical Requirements

The CRM solution should conform to the following technical specifications to ensure it fits the company's IT landscape and future growth:

Cloud-Based Deployment with Mobile Access

The system should be deployed in a cloud environment (preferably a Software-as-a-Service platform) to minimise on-premises infrastructure needs and to allow access from any location. Users must be able to access the CRM via a web browser, and dedicated mobile access should be supported through responsive web design or native mobile apps for smartphones/tablets. Field sales and support personnel should have full functionality on the go, with real-time access to customer data and the ability to update records from mobile devices. The cloud deployment should also ensure high availability and regular backups managed by the provider, so that the system is reliable and data is protected against loss.

Role-Based Access Control (RBAC)

Implement robust role-based permissions so that users only access the data and functions appropriate to their job roles. Administrators should be able to define user roles (e.g. Sales Representative, Sales Manager, Customer Support Agent, Production Planner, System Administrator) and grant each role specific permissions (such as view, edit, or delete rights on certain records or modules). This ensures sensitive information (for example, financial data or strategic customer details) is only accessible to authorised personnel. By assigning CRM access based on roles, the system can enforce least-privilege access and improve data security – team members access only what they need. The CRM should also allow role-based UI customisation (so, for instance, a support agent sees the support module but not sales opportunities if that's not relevant to their role).

Scalable Architecture

The CRM must be capable of scaling to accommodate business growth in terms of both users and data volume. The architecture should support a mid-sized firm's expansion to a larger user base without performance degradation. For instance, as the number of contacts, leads, and transactions grows into tens or hundreds of thousands, the system should continue to perform reliably with minimal latency. A modern multi-tier or cloud-native architecture that can scale horizontally (adding more computing resources or nodes) or vertically (increasing resources on existing servers) is preferred. This scalability ensures the CRM remains effective as the company grows or during peak usage periods (e.g. large marketing campaigns or seasonal sales spikes), protecting the user experience and response times.

Data Import and Export Capabilities

Provide user-friendly tools to import existing data into the CRM and to export data out of the CRM. Upon initial implementation, the company should be able to import legacy data (such as customer lists, open leads/opportunities, and historical sales data) via CSV or Excel files, with an import wizard to map source fields to CRM fields and validate the data. The CRM should handle common data import needs (de-duplicating records, error reporting for failed rows) to simplify migration from spreadsheets or another system. Likewise, it should be easy to export data (all records or filtered subsets) into common formats (CSV, XLSX) so that the company can create local backups, feed data to external analysis tools, or migrate to a different system in the future. Open data import/export capabilities prevent vendor lock-in and facilitate integration with external reporting tools or data warehouses.

API Availability for Third-Party Integration

The CRM must offer a well-documented application programming interface (API) to enable custom integrations and extensions. The API should allow programmatic access to core CRM functions and data (e.g. create or update records, query contacts or orders, trigger workflows) in a secure manner. A RESTful API with JSON support is expected (along with webhooks for event notifications), though support for other standards (SOAP or GraphQL) can be a plus. The API needs to be secured via authentication (such as OAuth 2.0 or API keys) to ensure only authorised systems access the data. With an available API, the firm can integrate the CRM with any additional third-party or in-house systems beyond the pre-built integrations, supporting future needs (for example, integrating with a custom manufacturing execution system or a customer web portal). Developer support and comprehensive API documentation should be provided by the vendor to assist in building and maintaining these integrations.

Usability Requirements

To ensure high user adoption across various departments, the CRM should be designed with usability in mind, emphasising an intuitive experience and flexibility for different workflows:

Intuitive UI/UX for Non-Technical Users

The system's user interface must be clean, modern, and easy to navigate so that staff with minimal technical training can use it effectively. Common tasks (like adding a new contact, updating an opportunity, or logging a call) should require only a few straightforward steps. The layout should be logically organised with clearly labelled menus and icons, and there should be consistency in design across all modules (sales, support, etc.). Helpful features would include quick search functionality, inline editing (to update records without navigating away), and perhaps drag-and-drop elements (for example, to move deals between pipeline stages). The goal is to **minimise** the learning curve – a sales representative or support agent should feel comfortable using the CRM after brief training. Overall, a user-friendly CRM interface improves adoption and data quality because users are more likely to consistently enter and retrieve information when the system is easy to use.

Customisable Dashboards and Fields

Different roles and departments should be able to customise what they see and how data is captured in the CRM. The system should offer configurable dashboards that users (or administrators) can tailor with various widgets, reports, and lists relevant to their needs (e.g. a support dashboard showing open tickets and response times, or a sales dashboard showing pipeline status, recent leads, and tasks). Users should also be able to save personalised list views or filters (for instance, a sales rep might save a filtered view of their own open opportunities). In addition, the CRM must allow the addition of custom fields and possibly custom entities, so the firm can adapt the software to its specific information needs. For example, the company might add a custom field for "Product Line" on opportunities or a checkbox for "Requires Engineering Approval" on quotes. These custom fields should be usable in forms, included in reports, and have the option to be made mandatory or optional. The ability to customise ensures the CRM can flexibly support the manufacturing firm's unique processes and terminology without requiring software changes.

Workflow Automation

The CRM should provide workflow automation capabilities to streamline routine tasks and enforce business processes. Users or administrators ought to be able to define if-then rules or automation flows that trigger actions based on events or conditions in the CRM. For example, the system could automatically assign a new web lead to a specific

salesperson based on territory, or send an email notification to a manager if a high-value opportunity remains idle in a stage for too long. Other automation examples include scheduling follow-up reminders when an opportunity is created, updating a field (e.g. status) when a certain condition is met, or generating a support case from an incoming customer email. Such features reduce manual effort and ensure nothing is overlooked. The CRM should support notifications and alerts, task creation, email sends, field updates, and other automated follow-up actions as part of its workflow engine. Ideally, a graphical workflow designer or wizard would be available so that non-technical users can configure these automations with minimal IT assistance. By leveraging automation, the company can increase efficiency and consistency in how CRM processes are executed.

Compliance and Security

The CRM system must adhere to strict security standards and support the company's compliance with privacy regulations, especially given the handling of personal and commercial data. Key requirements include:

Data Privacy Compliance (GDPR and Australian Regulations)

The CRM must enable compliance with the EU General Data Protection Regulation (GDPR) and Australian data privacy laws (such as the Australian Privacy Act and Australian Privacy Principles) in its data handling and features. This means the system should allow the business to manage customer data in line with consent requirements and individuals' rights. For example, the CRM should be able to record and respect customer communication preferences (opt-ins/opt-outs for marketing) and should facilitate responding to data subject requests – such as providing a copy of a contact's data or deleting a customer's personal data upon request – within required timeframes. The vendor's hosting and data processing practices should meet international privacy standards, as regulations like GDPR and the Australian Privacy Act set global benchmarks for data protection. If the CRM data is stored in cloud data centres, the location of those servers should be disclosed and ideally be in jurisdictions with adequate data protection (e.g. within Australia or countries with equivalent privacy safeguards). In summary, **privacy by design** principles should be in place, ensuring personal data is collected and used only for legitimate purposes, retained only as long as necessary, and protected by features like consent tracking and configurable data retention/anonymisation policies.

Audit Logs and User Activity Tracking

The system shall maintain detailed audit logs to track user activities and critical events. At a minimum, all create, update, and delete actions on records should be logged with a timestamp, the responsible user, and details of the change. Ideally, the CRM also logs user login/logout events and significant actions like mass data exports or bulk emails sent. These audit trails are crucial for security oversight and compliance audits, allowing the company to review who accessed or modified data and when. Administrators should be able to generate audit reports or retrieve logs easily via an interface or API. The audit logging mechanism itself should be tamper-resistant (users cannot alter or disable their own activity records) to ensure integrity. By having a clear record of user actions, the firm can detect unauthorised access or changes and demonstrate accountability as required under regulations (for example, as evidence of proper data handling in the event of an investigation).

Data Encryption (In Transit and At Rest)

All sensitive data handled by the CRM must be protected through strong encryption, both during transmission and when stored. Data in transit (for example, data exchanged between the user's browser or mobile app and the CRM server) should be encrypted using protocols like TLS/SSL to prevent eavesdropping or man-in-the-middle attacks. Likewise, data at rest – the information stored in the CRM's databases, backups, and logs – should be encrypted using industry-standard algorithms (such as AES-256) so that it remains protected even if the underlying storage is compromised. Robust encryption and access control are essential measures demanded by modern privacy regulations and security best practices. The system should also enforce secure user authentication (e.g. strong password policies and support for two-factor authentication) and session management to prevent unauthorised access. Additionally, the CRM vendor should undergo regular security testing and provide timely updates/patches to address any vulnerabilities. By implementing encryption and strong security controls, the CRM will safeguard sensitive customer and business data in transit and at rest, helping the company meet its compliance obligations and protect against data breaches.