**CRM Brief Template**

**Introduction**

[Introduction to your organisation in brief which discusses your history and important journey milestones during operation.]

**Organisation vision / mission**

[What is your current top-level vision or mission for your organisation?]

**Organisation goals**

[In accordance with your vision / mission what organisational goals have you set yourself to achieve?]

# **Project Objective**

[What objectives are you trying you achieve in the procurement of this new system?]

# **Core requirements**

# Under the following headings what core headline requirements you need from your new system?

**Contact Relationship Management**

**Donations**

**Memberships**

**Event Ticket Sales**

**Marketing**

**Reporting & Analysis**

**Venue / Room Management**

**Functionality Specification**

Use this section to detail the exact criteria you require for each of the above headings marking which features are essential or desirable.

**The columns highlighted in green should be completed by the system supplier in response to your organisational requirements.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Requirement****(E – Essential,****D – Desired)** | **Functionality in place?****(Y – Yes****N – No)** | **Comment if marked No. Include details of integrated 3rd party platforms to service requirement** |
| Example criteria | E |  |  |

**Questions**

Use this section to pose any scenario-based questions to the applicant. These could be based on current challenges you currently have and how the applicant’s platform could potentially solve this.

**Pricing structure**

**The columns highlighted in green will allow the system supplier to detail any upfront or ongoing costs that will be incurred to you for the following services. Allow for additional rows to be added as required.**

|  |  |  |  |
| --- | --- | --- | --- |
|   | **Value of one-off cost** | **Value of annual recurring costs**  | **Comments** |
| Installation |   |  |   |
| Initial set up training  |   |  |   |
| Cost of ongoing service  |   |  |   |
| Bespoke reporting services |   |  |   |
| Email marketing platform |   |  |   |
| Payment Processing |   |  |   |
| System upgrades and releases |   |  |   |
| Ongoing training & support |   |  |   |
| TOTAL COST |   |  |  N/A |

**Timescale**

Detail any specific project timelines you are working towards.

**Project contacts**

[Detail who the main project contacts within your organisation are and who they should contact if they have further questions.]