FREE TEMPLATE · BUSINESS REQUIREMENT DOCUMENT

# Zoho Backstage

## Business Requirement Document

Business requirement document template for a Zoho Backstage event platform setup

13 sections · 84 questions · fillable PDF

## Document Control

| | |
|---|---|
| Client company | Project name |
| Prepared by | Role and email |
| Date | Version |
| Implementation partner | Target go-live date |

## Stakeholders

| Name | Department and role | Email | Decision maker |
|---|---|---|---|
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |

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# How To Use This BRD

1. Answer each question in the box under it. Where there is a dropdown, pick an answer or type your own, then add detail in the box beside it. Attach examples, forms or sheets where a question asks for them.
2. Tick the priority for each requirement: Must have for go-live, Nice to have for a later phase, or Not needed.
3. Leave a question blank if it does not apply or you are not sure. We go through open points together in the workshop.
4. Each question has a code (for example LD-03) so everyone can refer to the same requirement in emails and meetings.
5. When it is complete, the signed BRD becomes the agreed scope for the implementation.

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### Want help completing it?

Linz Technologies runs requirement workshops and implements Zoho for teams in the UAE, India and worldwide.
13+ years as a Zoho partner · 1,500+ Zoho implementations · sales@linztechnologies.com


## 1. Business Overview

BO · 8 questions

Why you are implementing Zoho Backstage and how you will judge success.

**BO-01** Describe your business in a few lines: what you do, for whom, and in which countries.

☐ Must ☐ Nice ☐ Not needed

**BO-02** What problems should Zoho Backstage solve? List the biggest pain points with your current process or system.

☐ Must ☐ Nice ☐ Not needed

**BO-03** What are the top three outcomes you expect in the first six months?

☐ Must ☐ Nice ☐ Not needed

**BO-04** Which KPIs will measure success?

☐ Must ☐ Nice ☐ Not needed

**BO-05** Which teams and locations are in scope for this phase?

☐ Must ☐ Nice ☐ Not needed

**BO-06** What is out of scope for this phase?

☐ Must ☐ Nice ☐ Not needed

**BO-07** Are there regulatory or compliance requirements to meet (GDPR, PDPL, DPDP Act, industry rules)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**BO-08** Is there a deadline or business event driving the go-live date?

☐ Must ☐ Nice ☐ Not needed

## 2. Organisation Setup

OS · 11 questions

Company-wide settings that the rest of Zoho Backstage depends on.

**OS-01** Legal company name, trading name and registered address as they should appear in the system.

☐ Must ☐ Nice ☐ Not needed

**OS-02** Which Zoho data centre should hold your data?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**OS-03** Which Zoho Backstage edition or plan is planned or already purchased, and how many licences?

☐ Must ☐ Nice ☐ Not needed

**OS-04** Base currency, and any other currencies you use.

☐ Must ☐ Nice ☐ Not needed

**OS-05** Time zone or time zones, date format and number format.

☐ Must ☐ Nice ☐ Not needed

**OS-06** Financial year start month

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**OS-07** Working days, business hours and holidays.

☐ Must ☐ Nice ☐ Not needed

**OS-08** Company logo and brand colours available for templates?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**OS-09** Is this one company, or several companies, brands or branches?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**OS-10** Which languages do users and customers need?

☐ Must ☐ Nice ☐ Not needed

**OS-11** Is your company domain verified with Zoho already?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 3. Users, Roles And Security

UR · 9 questions

Who uses Zoho Backstage and what each person can see and do.

**UR-01** List the users by department with their job titles, managers and email addresses (or attach a sheet).

☐ Must ☐ Nice ☐ Not needed

**UR-02** Describe the roles and the reporting hierarchy from top to bottom.

☐ Must ☐ Nice ☐ Not needed

**UR-03** Data visibility: who should see whose records?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**UR-04** Which actions must be restricted (delete, export, import, edit settings, view reports)?

☐ Must ☐ Nice ☐ Not needed

**UR-05** Are there sensitive fields only some roles may see or edit? List them.

☐ Must ☐ Nice ☐ Not needed

**UR-06** Two-factor sign-in required for all users?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**UR-07** Single sign-on

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**UR-08** Who are the administrators on your side, and who approves changes to the setup?

☐ Must ☐ Nice ☐ Not needed

**UR-09** Is an audit trail of changes required?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 4. Events

EV · 4 questions

What you run.

**EV-01** Event types

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**EV-02** Number of events per year and typical attendees per event.

☐ Must ☐ Nice ☐ Not needed

**EV-03** Event website needs (pages, languages, brand).

☐ Must ☐ Nice ☐ Not needed

**EV-04** Several events running at the same time?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 5. Registration And Ticketing

TK · 6 questions

Getting people registered.

**TK-01** Ticket types and prices (free, paid, early bird, VIP, group).

☐ Must ☐ Nice ☐ Not needed

**TK-02** Registration form fields.

☐ Must ☐ Nice ☐ Not needed

**TK-03** Payment gateway for paid tickets?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**TK-04** Approval-based registration?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**TK-05** Promo codes and discounts?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**TK-06** UAE events: DET or DTCM ticketing compliance needed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 6. On-Site And Virtual Experience

ON · 5 questions

On the day.

**ON-01** Badge printing and QR check-in?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**ON-02** Session-level check-in?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**ON-03** Virtual or hybrid streaming?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**ON-04** Agenda, tracks, speakers and halls.

☐ Must ☐ Nice ☐ Not needed

**ON-05** Event mobile app for attendees?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 7. Sponsors And Exhibitors

SP · 3 questions

Partners at your events.

**SP-01** Sponsor packages and exhibitor booths?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**SP-02** Exhibitor portal for their details and staff?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**SP-03** Lead capture for exhibitors?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 8. Workflows, Approvals And Notifications

WF · 7 questions

Rules that run on their own inside Zoho Backstage.

**WF-01** List the automatic actions you want (for example: when X happens, do Y and notify Z).

☐ Must ☐ Nice ☐ Not needed

**WF-02** Which processes need approval, at how many levels, and who approves?

☐ Must ☐ Nice ☐ Not needed

**WF-03** What happens if the approver is away or does not respond?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**WF-04** Which notifications are needed, to whom, and by which channel (email, Cliq, WhatsApp, mobile push)?

☐ Must ☐ Nice ☐ Not needed

**WF-05** Are scheduled reminders or escalations needed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**WF-06** List the email or message templates you need.

☐ Must ☐ Nice ☐ Not needed

**WF-07** Should approvers act from email or the mobile app?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 9. Reports And Dashboards

RD · 6 questions

What management, managers and users need to see.

**RD-01** List the reports you use today, or attach examples.

☐ Must ☐ Nice ☐ Not needed

**RD-02** Which dashboards does management need?

☐ Must ☐ Nice ☐ Not needed

**RD-03** Which dashboards do team managers need?

☐ Must ☐ Nice ☐ Not needed

**RD-04** Should reports be emailed automatically?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**RD-05** Do you need reports that combine data from several Zoho apps (Zoho Analytics)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**RD-06** Who may export reports and data?

☐ Must ☐ Nice ☐ Not needed

## 10. Integrations

IN · 6 questions

Other systems Zoho Backstage must talk to.

**IN-01** Zoho CRM (attendees and leads).

☐ Must ☐ Nice ☐ Not needed

**IN-02** Zoho Campaigns or other email marketing.

☐ Must ☐ Nice ☐ Not needed

**IN-03** Payment gateway.

☐ Must ☐ Nice ☐ Not needed

**IN-04** Accounting for sponsorship invoices.

☐ Must ☐ Nice ☐ Not needed

**IN-05** Are there in-house systems with APIs we should connect to? Describe what must flow and in which direction.

☐ Must ☐ Nice ☐ Not needed

**IN-06** Do you need a portal for customers, partners, vendors or employees?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

## 11. Data Migration

DM · 7 questions

Moving your existing data into Zoho Backstage.

**DM-01** Where is the data today?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**DM-02** Which records should be migrated, and roughly how many of each (past attendees, contacts, sponsors, exhibitors)?

☐ Must ☐ Nice ☐ Not needed

**DM-03** How much history should be migrated?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**DM-04** Should attachments and documents be migrated?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**DM-05** Who will clean the data before migration?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**DM-06** Is a test migration and sign-off needed before the final load?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**DM-07** Cut-off date after which the old system becomes read-only.

☐ Must ☐ Nice ☐ Not needed

## 12. Mobile And AI

MB · 5 questions

Working on the move, and AI help inside the system.

**MB-01** How many users will use the mobile app?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**MB-02** Is offline access needed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**MB-03** Do you want AI predictions, summaries or anomaly alerts (Zia)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**MB-04** Would you like an AI assistant (Zia, ChatGPT, Claude or Copilot) to answer questions from this data?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**MB-05** Are there tasks AI should never do automatically?

☐ Must ☐ Nice ☐ Not needed

## 13. Testing, Training, Go-Live And Support

GL · 7 questions

Making sure the team is ready and supported.

**GL-01** Who will test the setup (user acceptance testing), and how much time can they give?

☐ Must ☐ Nice ☐ Not needed

**GL-02** How should training be delivered?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**GL-03** How many administrators and how many end users need training?

☐ Must ☐ Nice ☐ Not needed

**GL-04** Do you need user guides in a specific language?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**GL-05** Preferred go-live approach

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**GL-06** Support needed after go-live

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

**GL-07** Who on your side will own Zoho Backstage after go-live?

☐ Must ☐ Nice ☐ Not needed

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## Sign-Off

By signing, both parties agree that this document describes the scope of the implementation.

### Client

Name

Designation

Signature

Date

### Implementation partner

Name

Designation

Signature

Date

**Planning a Zoho Backstage implementation?**

Send your completed BRD to sales@linztechnologies.com for a scoped quote, or visit linztechnologies.com

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