FREE TEMPLATE · BUSINESS REQUIREMENT DOCUMENT

Zoho People

Business Requirement Document

Business requirement document template for a Zoho People HRMS implementation

16 sections · 124 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
			☐
			☐
			☐
			☐

What Is Inside

- Business Overview (8)
- Organisation Setup (11)
- Users, Roles And Security (9)
- Organisation Structure (9)
- Leave Management (13)
- Attendance And Shifts (10)
- Onboarding And Offboarding (8)
- Documents And Compliance (4)
- Performance, Learning And Engagement (9)
- Self-Service And Payroll Handover (5)
- Workflows, Approvals And Notifications (7)
- Reports And Dashboards (6)
- Integrations (6)
- Data Migration (7)
- Mobile And AI (5)
- Testing, Training, Go-Live And Support (7)

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.

Contents

BO 1. Business Overview
OS 2. Organisation Setup
UR 3. Users, Roles And Security
OR 4. Organisation Structure
LV 5. Leave Management
AT 6. Attendance And Shifts
ON 7. Onboarding And Offboarding
DC 8. Documents And Compliance
PF 9. Performance, Learning And Engagement
SS 10. Self-Service And Payroll Handover
WF 11. Workflows, Approvals And Notifications
RD 12. Reports And Dashboards
IN 13. Integrations
DM 14. Data Migration
MB 15. Mobile And AI
GL 16. Testing, Training, Go-Live And Support

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 People 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 People 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 People 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 People 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 People 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. Organisation Structure

OR · 9 questions

Locations, departments and how people report.

OR-01 Number of employees today, and expected in two years.

☐ Must ☐ Nice ☐ Not needed

OR-02 List office and site locations (city, country, headcount).

☐ Must ☐ Nice ☐ Not needed

OR-03 List departments and sub-departments.

☐ Must ☐ Nice ☐ Not needed

OR-04 List designations or job titles.

☐ Must ☐ Nice ☐ Not needed

OR-05 Do you have an org chart showing who reports to whom?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OR-06 Employee types

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OR-07 Which employee fields must be captured (personal, job, bank, emergency contact, dependants, visa)?

☐ Must ☐ Nice ☐ Not needed

OR-08 Employee ID format

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OR-09 Who are the HR admins, and should location or department admins manage their own employees?

☐ Must ☐ Nice ☐ Not needed

5. Leave Management

LV · 13 questions

Leave types, rules and approvals.

LV-01 Is your leave policy written down?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-02 List the leave types (annual, sick, maternity, paternity, hajj, compassionate, unpaid) and days for each.

☐ Must ☐ Nice ☐ Not needed

LV-03 How is leave credited?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-04 Pro-rate leave for new joiners?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-05 Can leave be applied during probation?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-06 Carry forward unused leave?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-07 Leave encashment allowed?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-08 Do rules differ by location, grade or nationality?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-09 Rules for half days, hourly leave, sandwich rules and leave across weekends or holidays.

☐ Must ☐ Nice ☐ Not needed

LV-10 Approval levels for leave

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-11 How many holiday calendars are needed (by location or religion)?

☐ Must ☐ Nice ☐ Not needed

LV-12 Compensatory off for working on holidays?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

LV-13 Current leave balances to load at go-live: who will provide them?

☐ Must ☐ Nice ☐ Not needed

6. Attendance And Shifts

AT · 10 questions

How time is recorded and checked.

AT-01 How do employees check in?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

AT-02 Biometric device make, model and number of devices.

☐ Must ☐ Nice ☐ Not needed

AT-03 Geo-fencing for check-in?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

AT-04 Shifts

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

AT-05 List the shifts with start and end times and break rules.

☐ Must ☐ Nice ☐ Not needed

AT-06 Late arrival, early exit and grace period rules.

☐ Must ☐ Nice ☐ Not needed

AT-07 Overtime calculated in Zoho People?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

AT-08 Regularisation rules: how many requests a month and who approves?

☐ Must ☐ Nice ☐ Not needed

AT-09 Work from home or on-duty requests?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

AT-10 Should attendance feed payroll for loss of pay and overtime?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

7. Onboarding And Offboarding

ON · 8 questions

From offer letter to last day.

ON-01 Should hires come from Zoho Recruit automatically?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

ON-02 Documents collected from new joiners (passport, visa, Emirates ID, certificates, bank details).

☐ Must ☐ Nice ☐ Not needed

ON-03 Onboarding tasks for HR, IT, admin and the manager, with timelines.

☐ Must ☐ Nice ☐ Not needed

ON-04 Candidate portal before joining?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

ON-05 List HR letter templates needed (offer, appointment, experience, salary certificate, NOC).

☐ Must ☐ Nice ☐ Not needed

ON-06 E-signature for letters and policies?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

ON-07 Assets to issue and track (laptop, phone, ID card, vehicle)?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

ON-08 Exit process: resignation approval, notice period, handover, asset return, exit interview, final settlement.

☐ Must ☐ Nice ☐ Not needed

8. Documents And Compliance

DC · 4 questions

Records that expire or must be kept.

DC-01 Which documents have expiry dates to track (passport, residence visa, Emirates ID, labour card, insurance, licences)?

☐ Must ☐ Nice ☐ Not needed

DC-02 Alert how many days before expiry?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DC-03 Policies employees must read and acknowledge.

☐ Must ☐ Nice ☐ Not needed

DC-04 Arabic and English versions of employee-facing content?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

9. Performance, Learning And Engagement

PF · 9 questions

Reviews, goals, training and surveys.

PF-01 Review cycle

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-02 What is reviewed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-03 Rating scale and how the final rating is calculated.

☐ Must ☐ Nice ☐ Not needed

PF-04 360-degree or peer feedback?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-05 Should ratings feed salary revisions or bonuses?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-06 Learning management (courses, tests, certificates)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-07 Engagement surveys?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-08 Timesheets against projects or clients?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PF-09 HR help desk for employee queries?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

10. Self-Service And Payroll Handover

SS · 5 questions

What employees do themselves, and how HR data reaches payroll.

SS-01 Requests employees should raise themselves (leave, letters, expense claims, asset requests, travel, profile updates).

☐ Must ☐ Nice ☐ Not needed

SS-02 Where will payroll run?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SS-03 Pay period and pay day.

☐ Must ☐ Nice ☐ Not needed

SS-04 Which data must reach payroll every month (attendance, leave without pay, overtime, joiners, leavers, salary changes)?

☐ Must ☐ Nice ☐ Not needed

SS-05 UAE: should payroll produce WPS and SIF files and gratuity accruals?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

11. Workflows, Approvals And Notifications

WF · 7 questions

Rules that run on their own inside Zoho People.

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

12. 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

13. Integrations

IN · 6 questions

Other systems Zoho People must talk to.

IN-01 Recruitment system (Zoho Recruit or other).

☐ Must ☐ Nice ☐ Not needed

IN-02 Payroll system and how data should move each month.

☐ Must ☐ Nice ☐ Not needed

IN-03 Biometric or access control devices.

☐ Must ☐ Nice ☐ Not needed

IN-04 Microsoft 365 or Google Workspace user sync?

Select

Choose, or type your own

☐ 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

14. Data Migration

DM · 7 questions

Moving your existing data into Zoho People.

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 (employees, leave balances, documents, assets, past appraisals)?

☐ 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

15. 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

16. 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 People after go-live?

☐ Must ☐ Nice ☐ Not needed

LINZ TECHNOLOGIES linztechnologies.com

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 People implementation?

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

LINZ TECHNOLOGIES linztechnologies.com