FREE TEMPLATE · BUSINESS REQUIREMENT DOCUMENT

Zoho Mail

Business Requirement Document

Business requirement document template for a Zoho Mail and Workplace migration

13 sections · 85 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)
- Domains And Mailboxes (7)
- Migration From Your Current Email (5)
- Security And Compliance (5)
- Workplace Apps (4)
- Workflows, Approvals And Notifications (7)
- Reports And Dashboards (6)
- Integrations (4)
- 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
MX 4. Domains And Mailboxes
MG 5. Migration From Your Current Email
SC 6. Security And Compliance
WP 7. Workplace Apps
WF 8. Workflows, Approvals And Notifications
RD 9. Reports And Dashboards
IN 10. Integrations
DM 11. Data Migration
MB 12. Mobile And AI
GL 13. 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 Mail 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 Mail 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 Mail 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 Mail 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 Mail 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. Domains And Mailboxes

MX · 7 questions

Who needs email and on which domains.

MX-01 List every email domain to set up (primary and aliases).

☐ Must ☐ Nice ☐ Not needed

MX-02 Who manages your DNS?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MX-03 Number of mailboxes and the storage each needs.

☐ Must ☐ Nice ☐ Not needed

MX-04 Shared mailboxes or group addresses (sales@, info@, accounts@) and who reads them.

☐ Must ☐ Nice ☐ Not needed

MX-05 Email aliases per user.

☐ Must ☐ Nice ☐ Not needed

MX-06 Email signature managed centrally?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MX-07 Catch-all address for misspelt emails?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

5. Migration From Your Current Email

MG · 5 questions

Moving mail without losing anything.

MG-01 Current email provider

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MG-02 How much mail history to move?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MG-03 Also migrate contacts and calendars?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MG-04 Approximate total mailbox size.

☐ Must ☐ Nice ☐ Not needed

MG-05 Preferred cutover

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

6. Security And Compliance

SC · 5 questions

Keeping email safe and auditable.

SC-01 Set up SPF, DKIM and DMARC?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SC-02 Email retention and eDiscovery needed?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SC-03 Rules for forwarding outside the company, attachments and external sharing.

☐ Must ☐ Nice ☐ Not needed

SC-04 Restrict email access to company devices or IP addresses?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SC-05 Encryption or data loss prevention rules?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

7. Workplace Apps

WP · 4 questions

The rest of Zoho Workplace.

WP-01 Which apps will you use?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WP-02 Team folders and permissions needed in WorkDrive.

☐ Must ☐ Nice ☐ Not needed

WP-03 Move files from Google Drive, OneDrive or a file server?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WP-04 Use Outlook or mobile mail apps alongside the Zoho Mail app?

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 Mail.

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 · 4 questions

Other systems Zoho Mail must talk to.

IN-01 CRM or helpdesk that should log email.

☐ Must ☐ Nice ☐ Not needed

IN-02 Scanners, printers or applications that send email (SMTP relay).

☐ Must ☐ Nice ☐ Not needed

IN-03 Are there in-house systems with APIs we should connect to? Describe what must flow and in which direction.

☐ Must ☐ Nice ☐ Not needed

IN-04 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 Mail.

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 (mailboxes, contacts, calendars, files)?

☐ 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 Mail 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 Mail implementation?

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

LINZ TECHNOLOGIES linztechnologies.com