FREE TEMPLATE · BUSINESS REQUIREMENT DOCUMENT

Zoho One

Business Requirement Document

Business requirement document template for a Zoho One company-wide rollout

12 sections · 83 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)
- Teams And Apps (6)
- Domain, Directory And Sign-In (7)
- Cross-Team Processes (6)
- 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
TA 4. Teams And Apps
DS 5. Domain, Directory And Sign-In
XF 6. Cross-Team Processes
WF 7. Workflows, Approvals And Notifications
RD 8. Reports And Dashboards
IN 9. Integrations
DM 10. Data Migration
MB 11. Mobile And AI
GL 12. 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 One 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 One 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 One 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 One 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 One 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. Teams And Apps

TA · 6 questions

Which teams use which apps, and in what order.

TA-01 List each team with head count and the apps or jobs it needs.

☐ Must ☐ Nice ☐ Not needed

TA-02 Licence plan

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

TA-03 Which team should go live first, and why?

☐ Must ☐ Nice ☐ Not needed

TA-04 Proposed rollout order for the remaining teams.

☐ Must ☐ Nice ☐ Not needed

TA-05 Which apps need implementation work (CRM, Books, People, Desk, Projects)?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

TA-06 Which apps can staff simply start using (Mail, Cliq, WorkDrive, Writer, Meeting)?

☐ Must ☐ Nice ☐ Not needed

5. Domain, Directory And Sign-In

DS · 7 questions

The admin foundation for every app.

DS-01 Email today

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DS-02 Move email to Zoho Mail?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DS-03 User directory

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DS-04 Groups and departments to create in the Zoho One directory.

☐ Must ☐ Nice ☐ Not needed

DS-05 Device management (MDM) for company laptops and phones?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DS-06 Allowed IP addresses or sign-in hours?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DS-07 Third-party apps staff should open from Zoho One (SSO or web tabs).

☐ Must ☐ Nice ☐ Not needed

6. Cross-Team Processes

XF · 6 questions

Where Zoho One pays off: data flowing between teams.

XF-01 List processes that cross teams (for example a won deal creates an invoice, a project and an onboarding task).

☐ Must ☐ Nice ☐ Not needed

XF-02 Which data must be shared between apps (customers, products, employees, projects)?

☐ Must ☐ Nice ☐ Not needed

XF-03 Which approvals involve more than one team?

☐ Must ☐ Nice ☐ Not needed

XF-04 Management dashboards that combine sales, finance, HR and support.

☐ Must ☐ Nice ☐ Not needed

XF-05 Custom apps needed for gaps (Zoho Creator)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

XF-06 For each main app, list the key requirements here, or complete that product's own Linz BRD template.

☐ Must ☐ Nice ☐ Not needed

7. Workflows, Approvals And Notifications

WF · 7 questions

Rules that run on their own inside Zoho One.

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

8. 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

9. Integrations

IN · 4 questions

Other systems Zoho One must talk to.

IN-01 Systems that must stay alongside Zoho One (ERP, industry software, banking).

☐ Must ☐ Nice ☐ Not needed

IN-02 Telephony, WhatsApp and payment providers.

☐ 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

10. Data Migration

DM · 7 questions

Moving your existing data into Zoho One.

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 (customers, contacts, deals, invoices, employees, tickets, projects)?

☐ 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

11. 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

12. 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 One after go-live?

☐ Must ☐ Nice ☐ Not needed

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 One implementation?

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