**Requirement Analysis (Functional, Operational, Technical) / Flow Charts**

In this activity you are expected to prepare the functional requirement analysis document by referring from the template.

Functional features:

functional and technical requirements for CRM software

As the name suggests, functional requirements for a CRM are tools any company or sole proprietor may require from this software. They're intended to overcome the challenges you’re facing, increase quantitative and qualitative indicators, and facilitate the management of your business.

For example, let's say your sales closure rate falls short of expectations and your customer satisfaction level leaves much to be desired. In this situation, you need to understand what exactly is preventing you from reaching your target in sales and what tools you lack to improve your interaction with clients. The following is a list of what you may need from a CRM from the functional point of view.

For example, insurance CRM features can include lead and opportunity management, policy and claims management, client communication, analytics and reporting, and integrations with other systems.

Business reporting & analytics

Knowing what direction your business is moving and your current progress toward that goal has always been important. Without this information, it's impossible to understand whether you’re standing still or moving forward. That's why report building has become one of the core features of CRM software.