**A picture containing drawing, food

Description automatically generated**

**Example Requirements for CRM system**

**Users (Priority: High, Medium, Low)**

**Data requirements**

1. First name
2. Surname
3. Age or DoB
4. Gender
5. Ethnicity
6. Social media: twitter handle, facebook
7. Email, mobile, landline
8. Address (verify encachment area)
9. Type of user (service user, staff, volunteer, funder, event organizer, 3rd party)

**Activities**

1. Record user details
2. Send and receive messages, emails, make phone calls
3. Provide advice, online, email, phone
4. Respond to queries

**Event Management (Priority: High, Medium, Low)**

**Data requirements**

1. Event details: venue (virtual or physical), date and time, facilities, budget, expected participants,
2. Staff and volunteers
3. Communication of event
4. Participants booked
5. Costs incurred
6. Feedback (from users, staff, volunteers, 3rd parties)

**Activities**

1. Plan and Organise event with…
2. Organise resources: venue,, volunteers, entertainment, food and drink, zoom setup
3. Schedule the event
4. Communicate event to users
5. Manage bookings, payments
6. Run the event
7. Obtain feedback from users
8. Run a lessons learnt exercise, review feedback and record improvements/changes/follow-on

**Fundraising (Priority: High, Medium, Low)**

**Data requirements**

1. Funding reqs (budget, timescale)
2. List of Funders, status, existing and new
3. Funding organization contact details
4. Funders requirements (linked document, pdf)
5. Use of funds

**Activities**

1. Record funding requirements
2. Search and select funders
3. Communication with funders
4. Record funders requirements
5. Provide funders performance feedback on use of funds

**Volunteering (Priority: High, Medium, Low)**

**Data requirements**

1. Volunteer details (in addition to data collected if already a user)
2. Type of volunteering
3. Availability
4. Start date
5. Volunteering performed/ongoing/performance

**Activities**

1. Record Volunteer details
2. Allocation of Volunteers
3. Review Volunteers performance