

Requirements document template

website, online store, CRM

A free template to fill in to describe your project before asking for quotes. Designed for small and medium businesses: about ten pages are enough, and you do not need to be technical. Type your answers in the shaded boxes.

Company name

Project (e.g. showcase website redesign, creation of a PrestaShop store, customer-tracking CRM)

Contact person, email

Date and version of the document

How to use this template

1. **Fill in parts 1 to 10**, in order. Answer in your own words: it is the provider's job to translate your needs into technical solutions.
2. **Add the appendix that applies to you**: online store (A), redesign of an existing site (B), CRM or business software (C). Delete the others.
3. **Describe needs, not solutions**: "the customer must be able to request a quote in two clicks" rather than "a red button at the top right".
4. **Leave blank what you do not know** and write "to be defined": a good provider will ask you the question.
5. **Send the same document to each provider**: their quotes will finally be comparable.

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Appendices: A. Online store — B. Redesign of an existing site — C. CRM or business software — Checklist before sending.

1. The company and its context

The provider must understand your business before proposing anything.

Your business in a few lines (what you sell, since when, how many people)

Your customer area (city, region, whole country, international)

Your current site, if there is one (address, creation date, what works, what no longer does)

Why start this project now?

2. Project objectives

A measurable objective tells you, six months later, whether the project succeeded.

Objective	How to measure it	Target at 6 months
<i>Receive more quote requests</i>	<i>Forms received per month</i>	<i>10 per month</i>

3. Target audiences

Who comes to the site, and what must they be able to do there?

Type of visitor	What they come looking for	What they must be able to do
<i>Small-business owner, aged 40-60</i>	<i>A local provider, prices</i>	<i>See the prices, book an appointment</i>

Two or three competitors or sites you like, and why

4. Site structure

The list of pages and how they are organised. One line per page is enough.

Page	What it contains
Home	Introduction, 3 services, customer reviews, contact
Services > Renovation	Description, photos of jobs, indicative prices

Is a version in another language needed?

5. Features

This is the part that weighs most on the price. Rank each feature: essential at launch, useful later, or just an idea.

Feature	Detail	Priority
Contact form	Received by email, anti-spam	Essential
Online appointment booking	Linked to my Google calendar	Later

TIP — Wanting everything in the first version is the first cause of budget overruns. Launch with the essentials, add the rest once the site is online.

6. Content

Late texts and photos are the first cause of website delays.

Content	Who supplies it	Already exists?	By when
Page texts			
Photos, videos			
Logo, brand guidelines			
Translations			
Legal notices, terms of sale			

Who will update the site after launch, and how often?

7. Design

Do you have a logo, colours or fonts that must be used?

Three words that describe the image you want (e.g. understated, warm, high-end)

Do designs already exist (made by a graphic designer)?

8. Technical constraints

Answer "I don't know" if needed: it is the provider's job to advise you.

Domain name (already registered? in whose name? with which registrar?)

Hosting (current or wanted, in your name?)

Tools to connect (calendar, invoicing or till software, CRM, newsletter)

Personal data collected (forms, customer accounts: GDPR)

Accessibility (a legal obligation for some businesses and public services)

9. Search engine optimisation

How should your customers find you on Google and in AI assistants?

What your customers type to find you (e.g. “plumber Perpignan”, “organic tea shop”)

Do you have a Google Business Profile?

Pages of your current site that attract visitors (to keep or redirect, see appendix B)

10. Budget, schedule and scope

Without a budget range, a provider cannot propose the right solution: they guess.

Budget envisaged (range in € excl. VAT, creation and monthly cost)

Desired launch date, and why (trade show, season, product launch)

Who approves the stages on your side?

Included in the project	Outside the project (or later)
Creation of the 8 pages	Writing the texts

After launch: maintenance, updates, backups (who takes care of it?)

A. Appendix: online store

Catalogue (number of products, size/colour variants, import from a file?)

Payment (card, bank transfer, PayPal, instalments)

Delivery (carriers, zones, rates, in-store pickup)

Operations (stock, till or accounting software, e-invoicing)

Customer relations (customer accounts, promo codes, reviews, automatic emails)

Sales to businesses (prices excl. VAT, discounts per customer, payment at 30 days)

B. Appendix: redesign of an existing site

A badly prepared redesign can lose in a few weeks the search ranking built over several years.

Most visited pages (Google Search Console or site statistics)

URLs that will change or disappear (to redirect one by one)

Data to carry over (customers, orders, articles, products)

Current features actually used, and those to drop

C. Appendix: CRM or business software

Here, we describe the way you work rather than pages.

User	Number	What they see and what they change
Salesperson	3	Their customers, their quotes; not invoicing

A customer's journey, from first contact to invoice (step by step)

The tools used today and what is not working (Excel files, old software, paper notebook)

Automations wanted (follow-ups, alerts, emails, repetitive tasks)

Existing data to carry over (volume, format)

Checklist before sending

- ☐ Each objective has a figure and a deadline
- ☐ Each feature has a priority
- ☐ We know who supplies each piece of content, and by when
- ☐ A budget range is stated
- ☐ What is outside the project is written in black and white
- ☐ The document has been read by a second person in the company

Need help filling it in?

I write your requirements document with you: about 2 hours of discussion on a video call, then the written document and a firm costing, for €290 excl. VAT, deducted from the quote if you entrust me with the project within 3 months. The document belongs to you.

nicolas@datapet.fr — details at datapet.fr/en/website-requirements-document