# Requirements Intake Form

## Purpose

This form is intended to collect implementation-specific requirements during the early stages of a Freshservice deployment. It should be shared with stakeholders at project kickoff and updated iteratively through discovery sessions.

## Instructions

Fill in each section to the best of your knowledge. Use 'TBD' where details are still being defined. This form will help inform the configuration of the service catalog, service-level agreements (SLAs), change types, asset tracking, and system integrations.

## 1. General Information

Project Name:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Unit / Department:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Contact:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Submitted:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## 2. Service Catalog Requirements

List of services to be published:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who can request each service (group, department, all users)?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Approval workflows required?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do any services require fulfillment by multiple teams?

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## 3. Change Management Requirements

Types of changes (Standard, Normal, Emergency):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who will raise changes?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who approves changes (CAB setup)?

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Is a change calendar or blackout window required?

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## 4. SLA and Escalation Policies

List SLAs by ticket type and priority:

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Response time expectations:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Resolution time expectations:

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Escalation rules and notification recipients:

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## 5. Asset and Configuration Management

What assets will be tracked (hardware, software, licenses)?

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Do you need relationships between assets and services/users?

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Will barcode scanning or integrations be used for asset updates?

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## 6. Integration Requirements

List any systems that Freshservice must integrate with (e.g., HRIS, SCCM, Azure AD):

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For each system, describe expected integration (data sync, SSO, ticket automation):

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Are API credentials or documentation available?

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## 7. Additional Notes

Other considerations, constraints, or open questions:

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