CRM Assessment Tool

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| **OPTION 1** | **OPTION 2** |
| Clipboard Mixed with solid fill**Features & Capabilities**  ❒ Client Info – Views & Fields  ❒ Action Plans/Work Flows  ❒ Opportunity Pipeline ❒ Dashboard ❒ Email Integration ❒ Outlook Calendar Integration  ❒ Portfolio System Integration ❒ Voice to Text Capability ❒ Mobile Access/App ❒ Other  | Clipboard Mixed with solid fill**Features & Capabilities**  ❒ Client Info – Views & Fields  ❒ Action Plans/Work Flows  ❒ Opportunity Pipeline ❒ Dashboard ❒ Email Integration ❒ Outlook Calendar Integration ❒ Portfolio System Integration ❒ Voice to Text Capability ❒ Mobile Access/App ❒ Other |
| **Initial Training & Support** ❒ Online Training ❒ Individual Group Training ❒ Customized Team Training ❒ Cost  | **Training & Support** ❒ Online Training ❒ Individual Group Training ❒ Customized Team Training ❒ Cost  |
| **Ability to Customize** ❒ Client Info – Views & Fields  ❒ Action Plans/Work Flows  ❒ Other  | **Ability to Customize** ❒ Client Info – Views & Fields  ❒ Action Plans/Work Flows  ❒ Other  |
| **Ongoing Training & Support** ❒ Online Training ❒ Individual Group Training ❒ Customized Team Training ❒ Cost  | **Ongoing Training & Support** ❒ Online Training ❒ Individual Group Training ❒ Customized Team Training ❒ Cost |
| **CRM Investment** ❒ Cost Per User Per Year $ ❒ Total Annual Cost $ | **CRM Investment** ❒ Cost Per User Per Year $ ❒ Total Annual Cost $ |
| **Data Conversion Services**  ❒ Comprehensive Service Provided ❒ Data Conversion Cost $ | **Data Conversion Services** ❒ Comprehensive Service Provided ❒ Data Conversion Cost $ |
| **Trial Offer** ❒ Available  | **Trial Offer** ❒ Available |