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 |