## **CRM Assessment Tool**

OPTION 1	OPTION 2
Features & Capabilities  Client Info – Views & Fields Action Plans/Work Flows Opportunity Pipeline	Features & Capabilities  Client Info – Views & Fields Action Plans/Work Flows Opportunity Pipeline
☐ Dashboard	☐ Dashboard
☐ Email Integration ☐ Outlook Calendar Integration	☐ Email Integration ☐ Outlook Calendar Integration
☐ Portfolio System Integration ☐ Voice to Text Capability	☐ Portfolio System Integration ☐ Voice to Text Capability
☐ Mobile Access/App ☐ Other	☐ Mobile Access/App ☐ Other
Initial Training & Support	Training & Support
☐ Online Training ☐ Individual Group Training	☐ Online Training ☐ Individual Group Training
☐ Customized Team Training ☐ Cost	☐ Customized Team Training ☐ Cost
Ability to Customize	Ability to Customize
☐ Client Info – Views & Fields ☐ Action Plans/Work Flows	☐ Client Info – Views & Fields ☐ Action Plans/Work Flows
☐ Other	☐ Other
Ongoing Training & Support	Ongoing Training & Support
☐ Online Training ☐ Individual Group Training	☐ Online Training ☐ Individual Group Training
☐ Customized Team Training ☐ Cost	☐ Customized Team Training ☐ Cost
CRM Investment	CRM Investment
Cost Per User Per Year \$	☐ Cost Per User Per Year \$
☐ Total Annual Cost \$	☐ Total Annual Cost \$
Data Conversion Services	Data Conversion Services
☐ Comprehensive Service Provided ☐ Data Conversion Cost \$	☐ Comprehensive Service Provided ☐ Data Conversion Cost \$
30-Day Free-Trail Offer	30-Day Free-Trail Offer
☐ Available	☐ Available

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