



CRM Assessment Tool

OPTION 1	OPTION 2
Features & Capabilities <ul style="list-style-type: none"> <input type="checkbox"/> Client Info – Views & Fields <input type="checkbox"/> Action Plans/Work Flows <input type="checkbox"/> Opportunity Pipeline <input type="checkbox"/> Dashboard <input type="checkbox"/> Email Integration <input type="checkbox"/> Outlook Calendar Integration <input type="checkbox"/> Portfolio System Integration <input type="checkbox"/> Voice to Text Capability <input type="checkbox"/> Mobile Access/App <input type="checkbox"/> Other 	Features & Capabilities <ul style="list-style-type: none"> <input type="checkbox"/> Client Info – Views & Fields <input type="checkbox"/> Action Plans/Work Flows <input type="checkbox"/> Opportunity Pipeline <input type="checkbox"/> Dashboard <input type="checkbox"/> Email Integration <input type="checkbox"/> Outlook Calendar Integration <input type="checkbox"/> Portfolio System Integration <input type="checkbox"/> Voice to Text Capability <input type="checkbox"/> Mobile Access/App <input type="checkbox"/> Other 
Initial Training & Support <ul style="list-style-type: none"> <input type="checkbox"/> Online Training <input type="checkbox"/> Individual Group Training <input type="checkbox"/> Customized Team Training <input type="checkbox"/> Cost 	Training & Support <ul style="list-style-type: none"> <input type="checkbox"/> Online Training <input type="checkbox"/> Individual Group Training <input type="checkbox"/> Customized Team Training <input type="checkbox"/> Cost
Ability to Customize <ul style="list-style-type: none"> <input type="checkbox"/> Client Info – Views & Fields <input type="checkbox"/> Action Plans/Work Flows <input type="checkbox"/> Other 	Ability to Customize <ul style="list-style-type: none"> <input type="checkbox"/> Client Info – Views & Fields <input type="checkbox"/> Action Plans/Work Flows <input type="checkbox"/> Other
Ongoing Training & Support <ul style="list-style-type: none"> <input type="checkbox"/> Online Training <input type="checkbox"/> Individual Group Training <input type="checkbox"/> Customized Team Training <input type="checkbox"/> Cost 	Ongoing Training & Support <ul style="list-style-type: none"> <input type="checkbox"/> Online Training <input type="checkbox"/> Individual Group Training <input type="checkbox"/> Customized Team Training <input type="checkbox"/> Cost
CRM Investment <ul style="list-style-type: none"> <input type="checkbox"/> Cost Per User Per Year \$ <input type="checkbox"/> Total Annual Cost \$ 	CRM Investment <ul style="list-style-type: none"> <input type="checkbox"/> Cost Per User Per Year \$ <input type="checkbox"/> Total Annual Cost \$
Data Conversion Services <ul style="list-style-type: none"> <input type="checkbox"/> Comprehensive Service Provided <input type="checkbox"/> Data Conversion Cost \$ 	Data Conversion Services <ul style="list-style-type: none"> <input type="checkbox"/> Comprehensive Service Provided <input type="checkbox"/> Data Conversion Cost \$
30-Day Free-Trial Offer <ul style="list-style-type: none"> <input type="checkbox"/> Available 	30-Day Free-Trial Offer <ul style="list-style-type: none"> <input type="checkbox"/> Available