

Summary evaluation matrix for financial services

### CRM Vendors

General Information	Vendor One	Vendor Two	Vendor Three	Vendor Four
Location				
Web Site				
Contact				
Years in Business				
Client Base (number of users)				
Web-Based SaaS				
Data Conversion services				
Data Conversion cost				
CRM	Vendor One	Vendor Two	Vendor Three	Vendor Four
Name, Addresses and Householding				
Audit History Logs				
Includes Suitability for Customer Record				
Synchronizes to Outlook				
Synchronizes to SmartPhone				
Allows import and export of data				
Mailing Labels Template				
Group Calendar				
Pre-defined filters (by date, category, etc.)				
User defined filters and fields (by user)				
Investments and Insurance	Vendor One	Vendor Two	Vendor Three	Vendor Four
Supports Investment Accounts				
Support Insurance Accounts				
Reports on Client and Household level				
Insurance Policy Tracking - manual entry				
Pre-defined reports				
User defined reports				
Opportunity Dashboard and Reports				
User defined workflow				
Seminar Management				
Team Dashboard and Notices				