How to Fully Integrate Your CRM

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| **CRM INTEGRATION** | **COMPLETED** |
| **Client Households Set Up – Basic Information**  ❒ Names & Contact Information  ❒ Clients Classified & Lead Advisor Identified  ❒ Basic Personal Information  ❒ Other – Add/Customize Fields & Views |  |
| **Client Views – Detailed Information**  ❒ Family, Occupation & Recreation  ❒ Financial Planning  ❒ Investment  ❒ Insurance  ❒ Estate & Tax Planning  ❒ Notes, History & Activities (usually pre-defined)  ❒ Other –Add/Customize Fields & Views |  |
| **Generating Reports & Searching**  ❒ Reporting by Client Type  ❒ Reporting by Wealth Engagement & Solutions  ❒ Reporting by Personal Interest |  |
| **Action Plans or Work Flows**  ❒ Client Experience Automated  ❒ Client Onboarding Automated  ❒ Client Rebranding Automated  ❒ Account Administration Automated |  |
| **Other Features**  ❒ Practice or Advisor Dashboard  ❒ Opportunities Pipeline  ❒ Document Storage/Company Library |  |
| **Advanced Integration**  ❒ Email Integration  ❒ Outlook Calendar Integration  ❒ Voice to Text Integration |  |
| **Individual User-Preferences**  ❒ Set up preferred views for individual use |  |

This checklist I’ll provide your CRM Manager with many of the core aspects of full CRM Integration.