Is there untapped value in your firm's CRM?

Use Our Functional Checklist

When proper CRM strategy is combined with consistent execution, the CRM should be one of the most important tools within your firm. To utilize your CRM to its fullest potential, there are different benchmarks, strategies, and data points that each department should review. Use our CRM checklist to review where your company stands today.

Business Development

Yes No

- ☐ ☐ Can you easily measure the volume and effectiveness of prospecting activities?
- ☐ ☐ Do you have a clear view into your pipeline with the ability to reasonably project your new business with expected close dates?
- ☐ ☐ Are you able to identify where opportunities are falling off and why?
- ☐ ☐ Does your opportunity pipeline data support trend analysis, enabling you to notice patterns in buying behavior from your prospects?

Client Servicing

Yes No

- ☐ ☐ Can you quantify the value, in AUM, of your relationships – including interested 3rd parties such as investment consultants, lawyers, and accountants?
- ☐ ☐ Are you sure that clients are consistently contacted in a timely manner and proactively reach out to clients whose time between communication has passed a certain threshold?
- ☐ ☐ Are all of your client agreements centralized in an easily accessible and searchable form?
- ☐ ☐ Are you accurately tracking your contractual obligations for client reporting, notifications, and billing?
- ☐ ☐ Are meetings being effectively prepared for?

Marketing

Yes No

- ☐ ☐ Are you able to identify and easily communicate with prospective clients based on modifiable criteria such as geographic region, market segmentation, AUM, and/or product interests?
- ☐ ☐ Can you track leads by source and associate them with likelihood of success?
- ☐ ☐ Can you follow-up with prospective clients in a timely fashion based on their interactions with your marketing initiatives?

Operations

Yes No

- ☐ ☐ Are you able to quickly visualize important data, metrics, and KPI's?
- ☐ ☐ Are you leverage automated workflows to manage mission critical processes instead of relying on emails, IM's, and sticky notes?
- ☐ ☐ Is there unnecessary intra-departmental communication to find information?

Compliance

Yes No

- ☐ ☐ Can you easily validate KYC activity?
- ☐ ☐ Are you managing regulatory compliance across your organization?
- ☐ ☐ Are your audits complex and time consuming?

Our team would love to review your results with you
so we can help your team understand its strengths and weaknesses of CRM utilization.

Contact us today!

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