CRM SCORECARD

Take the assessment to determine if you're utilizing the 4 core functions of your CRM. Reach out to your CRM vendor's sales or service team if you think you could benefit from additional training or features.

Data Infrastructure	Yes	No	If No
Do you trust your data?			• Develop consistent data entry • Perform a CRM Cleanup
Can you audit your data?			• Utilize client & account tags/fields, activity
Do you have a defined list of identifiers you use for your clients accounts & notes?			• Listen to the Firm Spotlight
Are your identifiers used consistently?			• Define a process with your team
Is your data organized in a way that is useful for your business?			• Utilize reminders, client & account tags/fields
PUT IT TO THE TEST			
Professional relationships, i.e. affiliations, should be searchable. Pull a list of all your professional COIs			
Now find how many of your clients are missing an email address on file			
Locate a full list of custom fields tagged for personalization. Client e.g. Alma Mater, drink preference; account e.g. check writing, contribution			

Reporting/Compliance	Yes	No	If No
Can you utilize your CRM reports to understand & take efficient action at scale?			• Utilize custom reports, exports, advanced find
Are there reports you can run to scale personalization? e.g. mailing lists			• Utilize bulk actions
PUT IT TO THE TEST			
Reporting helps streamline important processes across clients accounts. Can you pull a list of all Inherited IRA accounts you manage that are required to take an RMD this year?			
Pull a list of clients that have had no contact, activities or communication in the past 6 months			

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Data Infrastructure	Yes	No	If No
Are you tracking activities and tasks in your CRM?			• Utilize workflows • Utilize tasks, pipeline management/opportunities
Are your operations running efficiently, providing consistency, and transparency into your operations?			• Watch the lesson • Utilize alerts/notifications, automations, calendar syncs & mail merge templates
Can you point to where your service model exists within each of your workflows/activities?			• Define a service model • Watch the lesson
Are you using your activity data to improve efficiency and productivity?			• Develop an ongoing review process

PUT IT TO THE TEST
Activities from your email & calendar should be tracked. Confirm you have your email and calendar activities synced to your CRM
Find all tasks or activities in your firm that are past due
Identify the # of tasks assigned to any given staff member. **Tip: this may be an opportunity to delegate effectively**
Pipeline management should provide valuable insight to your sales process. Find how many opportunities are set to close in the next 30 days

Reporting/Compliance	Yes	No	If No
Technology should add scale to your operations. Are your technology integrations providing value by automating processes and/or data entry?			• Perform a Tech Stack Review • CRM Integration Diagram

PUT IT TO THE TEST
Integrations are two sided. Can you find your settings which show integrations turned on in your CRM?
Now check your third party tech provider. Is the integration turned on in those settings?