



Many firms will start their search by gathering a list of features from the various vendors.

Instead, make a list of your specific needs, then make sure the system you choose offers the functionality you need.

Here is a helpful list of commonly sought-after functionality to get you started.

If you need further assistance, a Sales Consultant is happy to help — call 866-JUNXURE (586-9873) or send an email to [sales@junxure.com](mailto:sales@junxure.com).

<b>Function</b>	<b>What to look for</b>
<b>Contact Data Storage</b>	<p>Make sure the system you choose has the data fields your firm needs to get as much information as possible at your fingertips, in one place – insurance, investment holdings and other accounts information, <i>etc.</i></p> <p>Look for interfaces with the other systems your firm uses, like Portfolio Management Systems, Financial Planning, Document Management, <i>etc.</i></p> <p>Look for easy-to-use tools to search through your data and group contacts for communications, reports and workflow management.</p>
<b>Workflow Management</b>	<p>Workflow Management is more than just tracking a history of phone call notes and meeting notes – more than a simple to-do list of tasks.</p> <p>Make sure your system can help systemize your firm.</p> <p>An effective CRM tracks action sequences with a completed task triggering others. It helps make sure recurring tasks get done every time.</p> <p>Make sure the system you choose has the functionality to truly transform your business.</p>
<b>Prospect Management and Business Development</b>	<p>Make sure to choose a system that will assist you in growing your business by allowing you to record. Make sure you can easily track your firms' opportunities – their probabilities, statuses, amounts, sources, <i>etc.</i> Does the system make it easy to confidently project future revenues?</p> <p>Look for functionality to track your key business metrics, making it easy to monitor the firm's wellbeing and to help define and evaluate success.</p>
<b>Letters, Emails and Document Management</b>	<p>Make sure the system you choose is able to incorporate paperless documents. Make sure it's easy to create and track the history of bulk</p> <p>Make sure the system you choose is able to easily integrate email communication as part of your workflow management.</p>
<b>Reporting and Dashboards</b>	<p>Make sure it's easy to retrieve information once it is entered.</p> <p>The system should offer flexible reports and dashboards.</p> <p>Look for both advisor-specific and build-it-yourself reports?</p>

<b><i>Function</i></b>	<b><i>What to look for</i></b>
<b>Remote Accessibility</b>	<p>Make sure your system meets your remote connectivity needs – a remote office, a PDA, <i>etc.</i></p> <p>Remember that a system doesn't have to be web-based to offer remote access.</p>
<b>Practice Management Consulting</b>	<p>Simply installing a new CRM database will not solve the problem. Make sure you're partnering with a firm that has the resources to help your firm learn how to create and implement these new systems.</p> <p>If your firm doesn't already have established procedures, make sure you're partnering with a firm that understands how the best managed financial advisory firms function and can transform your business.</p>
<b>Technical Support</b>	<p>Make sure you understand the level of technical support that is provided with the system.</p>