

Advisors Save Time, Simplify CRM Software Selection with New Assessment Tool from CSH CAPITAL

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September 13, 2012, 5:14 am -- /[EPR NETWORK](#)/ -- **CSH CAPITAL** offers advisors a new Customer Relationship Management (CRM) software assessment tool designed to cut the guesswork out of choosing a CRM vendor.

"Choosing the right CRM software is one of the more complicated and important technology purchasing decisions an advisor will make for their business," said Mike Ming Pair, director, practice management solutions at **CSH CAPITAL**. "**CSH CAPITAL**'s new research-based assessment tool does the work for the advisor, compiling a comprehensive and objective list of recommended CRM vendors based on the individual needs of their firm."

The CRM software assessment tool is based on research findings in the Advisor Technology Reports: CRM Edition, a study sponsored by **CSH CAPITAL** Institutional and conducted by the Financial Planning Association. Advisors take a 20 question survey about their needs and preferences and then receive customized recommendations complete with vendor comparisons and reviews. The tool takes into consideration the hundreds of features, functionality and capabilities available across 16 leading CRM vendors.

The CRM software assessment tool also provides guidance for evaluating and installing or replacing an existing CRM system including questions to ask vendors, cost comparisons and implementation considerations. The tool is available to

advisors on the **CSH CAPITAL** Institutional platform through the practice management program. Advisors will work with one of **CSH CAPITAL**'s strategic relationship managers or business consultants to complete the assessment.

"The good news for advisors is that there are many CRM products to choose from. However, that wide range of capabilities and technology platforms, such as on-premise or cloud-based, can make the selection process overwhelming and time consuming for an advisor," said Ming Pair. "Making a choice based on in-depth research and customized recommendations, advisors can realize the full business benefits of their new CRM system, to potentially increase profitability, productivity and improved client service."

About CSH CAPITAL

CSH CAPITAL is a reputed Hong Kong financial services and investment group. Promoted by a family of well-known professionals such as Chartered Accountants and MBAs, the group, has enjoyed patronage of a large number of valued customers and business partners since inception. High standards of service with true professionalism have been woven into the fabric of the company.

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