Portal Planner

Section	Example	Your Response
Portal Research Matrix	Compare at least 3 online portals. List pros/cons based on cost, features, UI, CRM integration.	
CRM Compatibility Check	List your current CRM and see how well it integrates with your top portal choices.	
Deal Room Summary	Write a teaser for your asset: include cap rate, location, projected IRR, and strategy.	
E-Signature Flow Test	Walk through an e-signature process in a demo portal. Note any friction points or issues.	
Security Checklist	Identify key security requirements: e.g., SSL encryption, MFA, password protocols.	
Investor Comms Calendar	Design a 6-month schedule. What updates will you send? Through which format?	