



November 2019

## “CRM is the beating heart of your industry”

Ricky Redtail recently spoke with *InvestmentNews* at Riskalyze’s Fearless Investing Summit 2019. In addition to discussing the integral nature of CRM to the modern advisory practice, he also references a few things Redtail is working on to enhance our platform. [You can check out that video here.](#)



## Redtail Engages AI to Boost Advisory Community

Redtail CEO Brian McLaughlin spoke with FinTech TV recently to provide some updates on Redtail’s upcoming A.I. offering and how it will impact advisors and help them improve their businesses. [Watch the video over at FinTech TV here.](#)

## What’s New in the CRM?

In October we rolled out some great updates centered around new CRM Preferences, filtering options, data sorting, and popup action windows mobility. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).



## What’s New in Integration?

**Copytalk** We hear you. ))) The integration between Copytalk and Redtail CRM has been updated to include the new Copytalker™ button, which allows advisors to dictate client-meeting notes from a button within Redtail CRM. Details on the new integration with Redtail are available [here](#), and you can see the Upcoming Webinars section below to sign up for our November session with Copytalk.

**Simplii** now offers an integration with Redtail for their VoIP services. Details on the new integration with Redtail are available [here](#), and you can register for our webinar with them today using the link in our Upcoming Webinars section below.



## Upcoming Webinars

- [Introducing Redtail Speak!](#): every Monday at 11:00 am Pacific
- [Redtail Overview Demos](#): every Tuesday at 11:00 am Pacific
- [30 Minute Quick Starts](#): every Wednesday at 11:00 am Pacific

### Topical Webinars:

[Best Practice Partner Webinar - Simplii](#)

Tuesday, November 5, 11:00 am Pacific

[PreciseFP - Integration Spotlight](#)

Wednesday, November 6, 10:00 am Pacific

[Syncing Your Data with Redtail CRM](#)

Thursday, November 7, 11:00 am Pacific

[How To Use Redtail CRM for Marketing](#)

Thursday, November 14, 11:00 am Pacific

[Best Practice Partner Webinar - Copytalk](#)

Wednesday, November 20, 11:00 am Pacific

[Product Overview – CRM](#)

Thursday, November 21, 11:00 am Pacific

Our webinars are *free* to users. You can see the [full schedule for upcoming webinars here](#) or use our Social links at the bottom of this newsletter to follow us for updates!



## Redtail University 2020!

Dates and locations for Redtail University 2020 will be announced very soon! Keep an eye on your inbox for that message and plan to be with us for one of those events in the coming year.

## Conferences

Representatives from Redtail Technology spend a lot of time on the road at both Broker Dealer Conferences and other industry events. Here’s a list of those we’ll be attending in the coming months:

- Sigma/Parkland Conference:** November 4-5, Detroit, MI
- Schwab IMPACT:** November 4-7, San Diego, CA
- H Beck National Symposium:** November 6-8, Bethesda, MD
- Tech Retreat Western Roundtable:** November 6-8, Sonoma, CA
- 1st Global National Conference:** November 10-12, Austin, TX
- IFG Practice Management Forum:** November 17-20, Dana Point, CA



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