

Redtail News

December 2020

Redtail Technology's Working Remotely 2020 Survey

In July of 2020, Redtail Technology conducted the “Working Remotely” survey to learn more about how financial advisors and their staffs adapted to remote work environments, how this affected their client engagement strategies, and which communication channels proved most effective when working in virtual environments. [You can read more about the results from this survey here.](#)



Redtail CRM Holiday Resources

With the holiday season upon us, it is time to put your plans for holiday outreach into action. Ongoing client communication is vital throughout the year, but there is perhaps no other season when

opportunities for natural points of contact are so readily available to you. We recently put

together a Resources blog post covering this topic, which also includes a FAQ section at the bottom to address the most common questions that our Support Team receives about tools to assist with this in Redtail CRM. [You can access this post here.](#)

Eat the big frog first: “recipes” for delighting your clients!

Hayley Mandrup, one of Redtail's Subject Matter Experts, is passionate about organization and time management and is always looking for ways to streamline internal processes and improve client experience. In a recent post to our blog, she shares her personal client experience challenges with a local craft store and offers up some tips for helping your office make sure that delighting your clients is a priority. [Read Hayley's fun take on task prioritization over at our blog now.](#)



3 tips for customizing client communication

The rapid shift to remote work along with restrictions on in-person meetings brought on by the pandemic changed much about how advisors work this year. Considering the massive shift in communication channels, one of the more surprising findings in Redtail's July Working Remotely survey was that advisors' top communication challenge (customizing communication for different clients) remained largely unchanged from the previous year. Redtail's Director of Sales David Mehlhorn addresses some of the ways advisors can meet this challenge head-on [in a recent piece at InvestmentNews](#).

What's New in Redtail Mobile?

We're excited to announce that Privacy Options can now be set for Activities from within Redtail Mobile! Additionally, style options can now be set for Note, Activity, Workflow, and Opportunity descriptions in the app . [You can learn more about these updates here.](#)



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:

[Product Overview - Speak](#)

Thursday, December 3, 11:00 am Pacific

[Product Overview - Email](#)

Thursday, December 10, 11:00 am Pacific

[Strengthening Client Relations and Increasing Engagement for a More Successful Practice: CEO Panel Webinar](#)

Tuesday, December 15, 10:00 am Pacific

[Product Overview - Imaging](#)

Thursday, December 17, 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!



redtailtechnology.com | support@redtailtechnology.com

800-206-5030



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