

Redtail News

April 2021

Redtail is honored to be recognized
for the third year in a row as the
market leader in CRM tools.



The 2021 T3/Inside Information Advisor Software Survey results are in!

We are honored by the results: nearly 62% of the market chooses Redtail and gives us an 8.06 average satisfaction rating!

[Read more here](#)



Redtail's Best Paw Forward Photo Challenge March winner

Is your pup ready for the spotlight? Sandy was, and will be featured in our assortment of CRM login pages for the month of April! Click below to see our two runners-up for the month, who will also grace our login pages, as well as the other contenders. [Challenge details available here.](#)

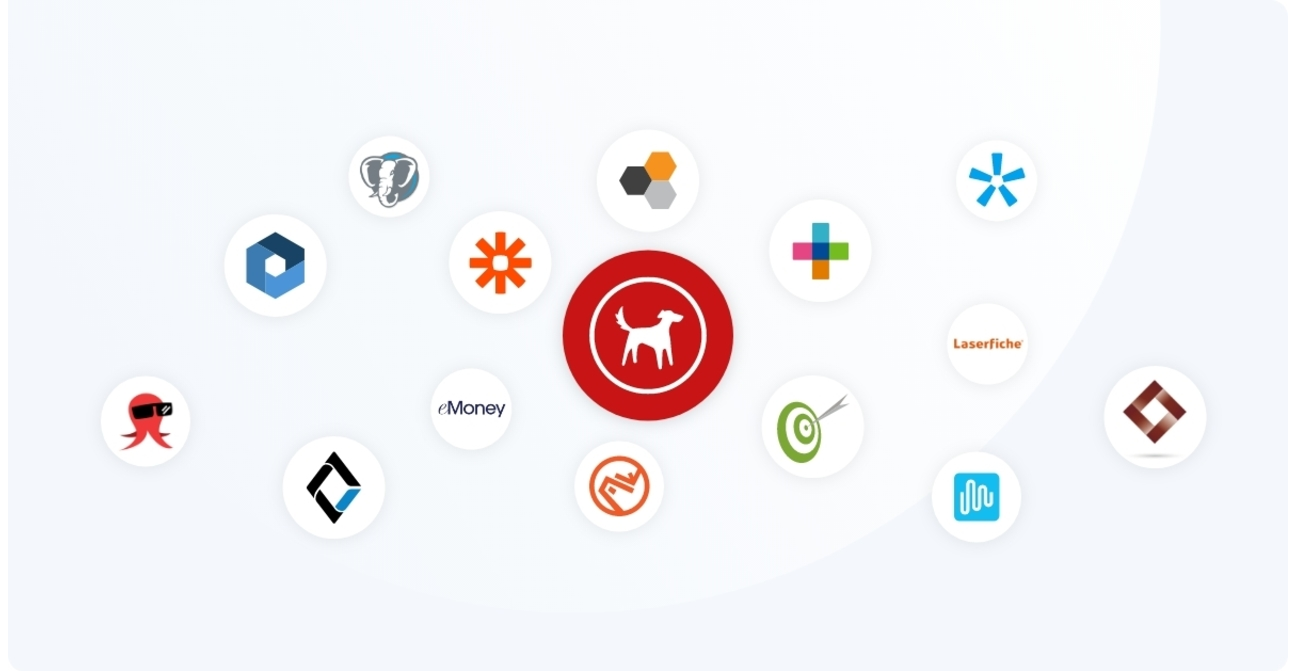
[View winner and runners-up](#)



Tips for managing a high performing team as a servant leader

Sarah Thomas, Managing Team Lead at Redtail, offers some tips on being a servant leader and showcasing your team's individuality and talents.

[Read her story now](#)



10 reasons why Redtail CRM may be just the solution you've been looking for

We wrapped this series up with Reasons 7-10 in March. You can access the series intro and Reasons 1-10 via the button below.

[Why Redtail CRM series](#)



In January 2020, we kicked off our **Advisor Hero campaign**. You can **nominate Advisor Hero candidates here**.

Read about our latest hero, Stephanie McCullough, [here](#)

What's new in integrations?



This new integration provides **Altigo** users the ability to pull desired contacts over from Redtail CRM into their electronic order entry and subscription processing platform for alternative investments.

[Learn more >](#)



This updated integration with **Asset-Map** includes the ability to create new households in Asset-Map from Redtail CRM or link existing households from the Redtail side, as well as access to Asset-Map

Household Summaries and/or Reports from Redtail contact records.

[Learn more >](#)

LOGICLY

This integration will allow Redtail users SSO (Single Sign-On) access to [Logicly](#) investment and portfolio analytics. Once in Logicly, advisors will be able to pull desired portfolio holdings directly from their Redtail accounts into Logicly's portfolio analysis tools.

[Learn more >](#)

Upcoming webinars [view all >](#)

Integration Update Webinar: Asset-Map + Redtail

Tuesday, April 6, 12:00pm Pacific

[Learn more >](#)

Best Practice Partner Spotlight: Advisor Websites

Wednesday, April 7, 10:00am Pacific

[Learn more >](#)

Workflow Series: Part 1 - Whiteboarding

Thursday, April 8, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Charesse Spiller, Founder and Operations Consultant at Level Best

Tuesday, April 13, 10:00am Pacific

[Learn more >](#)

Workflow Series: Part 2 - Building

Thursday, April 15, 11:00am Pacific

[Learn more >](#)

Best Practice Partner Spotlight: FMG Suite

Wednesday, April 21, 10:00am Pacific

[Learn more >](#)

Workflow Series: Part 3 - Applying

Thursday, April 22, 11:00am Pacific

[Learn more >](#)

Workflow Series: Part 4 - Enhancing

Thursday, April 29, 11:00am Pacific

[Learn more >](#)

Redtail Speak Overview Demo

Live Every Monday at 11:00am Pacific

[Learn more >](#)

Redtail CRM Overview Demo

Live Every Tuesday at 11:00am Pacific

[Learn more >](#)

30 Minute QuickStart

Live Every Wednesday at 11:00am Pacific

[Learn more >](#)

Our webinars are free to users. Bookmark our [Upcoming Webinar](#) page or follow us on social media to stay up-to-date on our upcoming webinars.



The banner features the XCELLR8 logo on the left, which includes a mountain range icon above the text "XCELLR8 ADVISOR FINTECH SUMMIT". To the right, the text reads "Join us at Finlocity's Advisor Fintech Summit" followed by "APRIL 28 & 29, 2021 | 10:45 AM - 3 PM EST". Below this, a row of logos for partner companies is displayed: NaviPlan (by Advent), advisorstream, AdvisorPeak, REDTAIL, entreda, Docupace, FIS, SKIENCE, SNAPPY KRAKEN, FORMS LOGIC, and invent.us. At the bottom of the banner is a red bar with the text "REGISTER NOW" in white.

The XCELLR8 Advisor FinTech Online Summit

Register now for this free event on April 28-29. Redtail's Director of Sales David Mehlhorn will be presenting a session, "Using CRM as Your Golden Source of Data", on Day 1 of the event.

[Register now](#)

Access Redtail CRM anywhere



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