

# Redtail News

March 2021



## 4 Ways to Build Company Culture While Working Remotely

"Will remote work, in some form, be the "new normal"? In this piece at *ThinkAdvisor*, Redtail CEO Brian McLaughlin explores maintenance and growth of company culture while working from home.

[View story](#)

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## **Redtail's Best Paw Forward Photo Challenge February winner**

Is your pup ready for the spotlight? Cortado was, and will be featured in our assortment of CRM login pages for the month of March!

[View winner and runners-up](#)

[View challenge details](#)

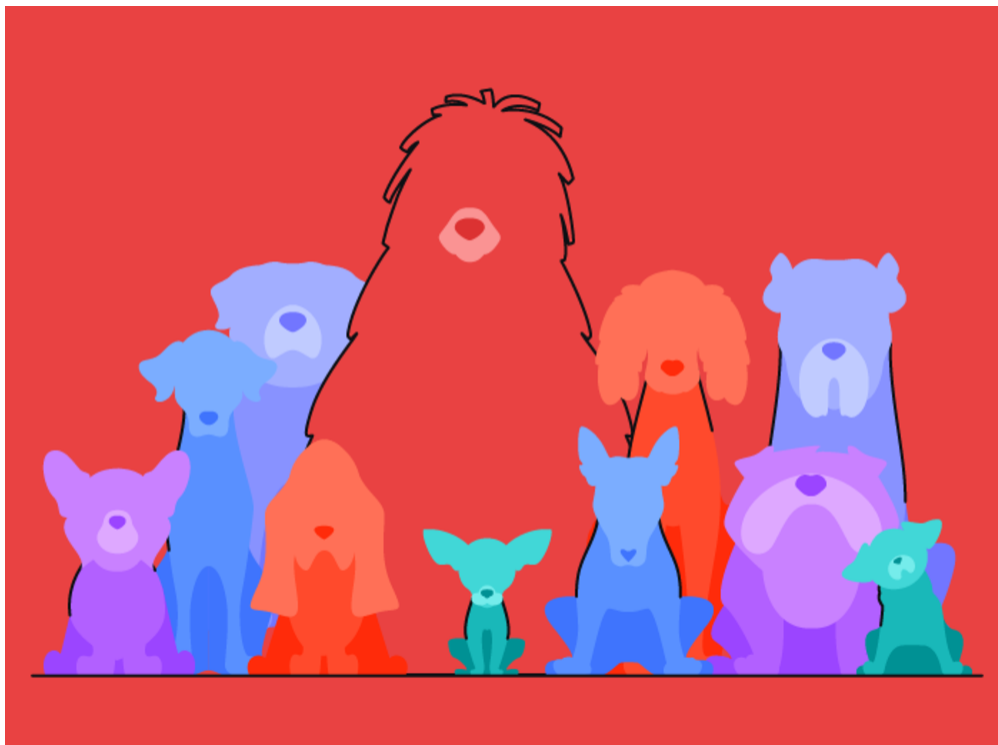
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**SEE A NEED**  
**FILL A NEED**

## Robots, repetition, and relationship-building

Hayley Mandrup, Subject Matter Expert at Redtail, recently shared a personal story that may have relevance to your business and how you can use Redtail CRM to recognize and fill needs among your client base.

[Read her story now](#)



**10 reasons why Redtail CRM may be just the**

# solution you've been looking for

Over the course of this 10-part series on the Redtail blog, our aim is to help you facilitate team buy-in so that your staff will:

- understand the importance of CRM to client experience.
- understand your expectations about how it will be used within your office to manage and maintain processes and data.
- recognize the opportunities it presents to streamline operations and foster business growth.

Access the series intro and Reasons 1-6 via the button below.

[Why Redtail CRM series](#)

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## Release Note Focus

**Redtail CRM updates of note for February include:**

- Workflow options are now available on workflow details pages.
- Workflow Task descriptions are now available on cursor hover.
- New color coding options are now available on your Redtail CRM Calendar.

[View details](#)

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# What's new in integrations?



With this integration Redtail CRM users can easily import their contacts into **Knudge** or link existing contacts to avoid duplicate data entry. Additionally, Knudge will push notes back into Redtail contact records when new nudges are posted or marked complete.

[Learn more >](#)



Updates to this integration include enhanced **Riskalyze** client data and metrics now visible inside Redtail, automated client data updates, and brand new visibility into a client's current portfolio, active proposal, and retirement information within Redtail.

*Note: as of today, March 2, existing users of this integration will need to re-authorize the integration to take advantage of these enhancements and continue using the integration.*

[Learn more >](#)

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## Upcoming webinars [view all >](#)

### **Best Practice Partner Spotlight: Pulse360**

Tuesday, March 2, 10:00am Pacific

[Learn more >](#)

## **Redtail Essentials: Relationships**

Thursday, March 4, 11:00am Pacific

[Learn more >](#)

## **Practice Management Takeover with Jen Goldman, CEO,**

### **Jennifer Goldman Consulting**

Tuesday, March 9, 10:00am Pacific

[Learn more >](#)

## **How to Prepare for Wealth Transfer**

Thursday, March 11, 11:00am Pacific

[Learn more >](#)

## **Redtail Essentials: Accounts**

Thursday, March 18, 11:00am Pacific

[Learn more >](#)

## **Best Practice Partner Spotlight: Hubly**

Tuesday, March 23, 11:00am Pacific

[Learn more >](#)

## **New Partner Spotlight: Max for Advisors**

Tuesday, March 30, 10:00am 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.

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## Access Redtail CRM anywhere



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