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

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!

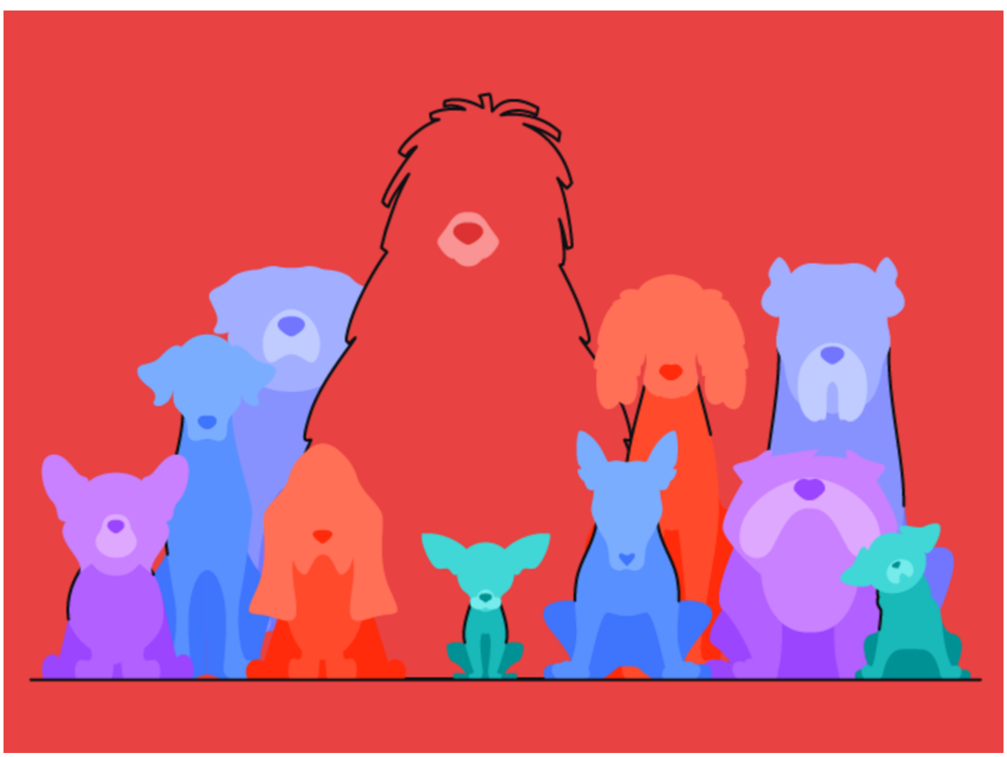
View winner and runners-up

View challenge details

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

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

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 >

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

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