

Redtail News

November 2020



Redtail CRM Calendar and Activity Management Resources

Because your Calendar is so important to the success of your business, we have a significant amount of documentation and video help at your disposal 24-7 to assist with any questions that arise. 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 activity management. [You can access this post here.](#)

Redtail CEO Brian McLaughlin interviewed at Orion's The Fuse Show Podcast

"You have to have a huge amount of collaboration between companies to make it work and to really tweak it and get it all set up. And when you have that great partnership, you know, miracles happen and great innovation happens."

Redtail CEO Brian McLaughlin recently joined Orion Advisor Technology to talk about building a successful fintech partnership. Their wide-ranging conversation also touched on how FinTechs are adapting to work during the pandemic, how the California wildfires have affected Redtail employees in our Sacramento location, conference swag, and pajamas for men! [That episode is available here.](#)

The T3 annual software survey is still open

The [T3 Software Survey](#) is always valuable to us as it provides insight both into what we might be doing better as well as into which new solutions in the industry we should be integrating with (if we haven't already). It is also valuable to advisors as they can see what other offices are using and happy with that may help them address challenges within their

offices. We encourage you to take ten minutes at your convenience to [complete this survey](#) and express your opinions about the software solutions you use to run your business.



In January we kicked off our [Advisor Hero campaign](#). If your organization has a story that should be told, we'd love to hear it and potentially share with others as a future installment in our Advisor Hero series. [You can nominate Advisor Hero candidates here](#). And, [read our latest Advisor Hero story on Lisa Pugel here](#).

What's New in Integrations?

[1Wire](#) offers your business the ultimate IP phone technology. This VoIP integration with 1Wire provides Screen Pop for VoIP, Click to Call for VoIP, and Call Logging for VoIP within Redtail CRM. [Learn more](#)



[about 1Wire and this integration with Redtail here.](#)

[Holistiplan](#) is tax planning software for advisors built to systematize and automate the process of reviewing a client's tax return to find potential planning



holistiplan

opportunities. This integration allows advisors to import Redtail contacts into Holistiplan and to send key figures and the selected observations from tax reports back to Redtail as notes. [Details on their new integration with Redtail are available here.](#)

LEVITATE

[Levitare](#) is a marketing platform designed to help small businesses grow through the lost art of keeping in touch. Levitate will automatically pull contacts, key facts, and tags from Redtail. Additionally, notes entered on clients in Levitate will automatically be pushed into notes on their contact record in Redtail, reducing

the need for redundant data entry. If you send an email to your customers or prospects through Levitate, a note will be made of that in Redtail as well. [Learn more about Levitate and this integration with Redtail here.](#)

[Market Insight Out](#) is a platform that leverages technology to create better marketing alignment between the manager, advisor, and investor. Market Insight Out users can now import their Redtail contacts into their MIO accounts to create email lists. From there, they can share content with that email list,



using firm-approved content for more frequent and personalised engagement to extend the firm's brand and grow/retain their business. [Details on their new integration with Redtail are available 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:

[Redtail Essentials: Calendar](#)

Thursday, November 5, 11:00 am Pacific

[Best Practice Partner Webinar - Smart RIA](#)

Tuesday, November 10, 10:00 am Pacific

[Practice Management Webinar - Charesse Spiller](#)

Wednesday, November 11, 10:00 am Pacific

[Searching Made Simple](#)

Thursday, November 12, 11:00 am Pacific

[Redtail Essentials: Templates](#)

Thursday, November 19, 11:00 am Pacific

[New Partner Spotlight - Voyant](#)

Thursday, November 19, 1:00 pm 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!



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