

Redtail News

October 2020



Redtail CRM Workflow Resources

In order that you might conveniently access all of the workflow resources we've put at your disposal from one central location, we recently published a piece to our blog that includes links to all of our workflow documentation, as well as to all of our recorded webinars that cover workflows. We've also added a FAQ section at the bottom to address the most common questions that our Support Team receives about workflows. [You can access this post here.](#)



Redtail is a 2020 Wealthies Awards Winner!

In early September, *WealthManagement.com* celebrated its sixth annual Industry Awards, the first installment presented entirely virtually to encourage social distancing. More than 60 companies and organizations were honored for stellar achievements in supporting financial advisor success. Redtail was named the winner in the Technology Providers: CRM category, specifically for our new mobile app. [You can read more about this here.](#)



Driving change in the financial industry: best of breed virtual panel discussion

Redtail CEO Brian McLaughlin recently joined a virtual panel discussion hosted by Joel Bruckenstein "to help advisors understand the advantages of working with Best of Breed API systems". [You can view a replay of that discussion here.](#)



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 Lee Stoerzinger here.](#)

What's New in Redtail Mobile?

We're excited to announce that Workflows are now accessible in the Redtail CRM Mobile app, allowing you to view, edit, and/or complete your workflow tasks on-the-go! Contact Favorites are now visible from the app as well. You can learn more about this update [here](#).



What's New in Integrations?



With [Appointment Reminder](#), you can automatically send appointment reminders via text message, voice message, or email to your clients. Appointment Reminder will now allow you to schedule calls with clients, based upon what is available in your Redtail Calendar. [Learn more about their updated integration with Redtail here.](#)

[Positively](#) combines the principles of positive psychology with modern wealth management to create stronger connections between people, their advisors, and their wealth. This integration allows advisors to import all of their Redtail CRM contacts with a Type of "Individual" into their Positively account. [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:

- [Best Practice Partner Webinar - Intulse](#)
Tuesday, October 6, 10:00 am Pacific
- [Best Practice Partner Webinar - AdvisorStream](#)
Wednesday, October 7, 10:00 am Pacific
- [How to Handle Prospecting - Part 1](#)
Thursday, October 8, 11:00 am Pacific
- [Practice Management Webinar - Derek Notman, CFP](#)
Wednesday, October 14, 10:00 am Pacific
- [How to Handle Prospecting - Part 2](#)
Thursday, October 15, 11:00 am Pacific
- [Redtail Essentials: Mail Merge](#)
Thursday, October 22, 11:00 am Pacific
- [Working Together: Black Diamond and Redtail CRM](#)
Tuesday, October 27, 11:00 am Pacific
- [How to Handle New Employees](#)
Thursday, October 29, 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!



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