

# Redtail News

June 2020



## Your CRM as a Component of Crisis Management

Our Training team conducted a webinar in May exploring some of the ways you might use Redtail CRM as a component of your crisis management; [you can view that webinar here](#). Additionally, we put together a companion guide for the webinar, [accessible here](#).

## Community Support in the Time of COVID-19

Redtail CEO Brian McLaughlin recently shared commentary at *ThinkAdvisor* outlining Redtail's efforts to provide support to the geographical communities we operate in, the community of staff we employ, and the community of advisors we serve. If you're interested in finding further ways to support your communities, [you may find some ideas in what Brian shares](#). He also recently joined [the TacoTech podcast](#) to talk about how we're maintaining a strong workplace culture during shelter in place.



**InvestmentNews and Redtail share Good News from the advisor community**

joined Matt Ackermann at *InvestmentNews* to discuss the kickoff of our recent partnership where we highlighted good news coming out of the advisory community. [You can watch that intro, as well as each of those Good News pieces, here.](#)

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## Ready to Adopt Texting? Keep These Dos and Don'ts In Mind

It's never a bad idea for advisors and their staff to brush up on the dos and don'ts of communicating with clients via texting.

[Read Redtail Relationship Manager Dusty Russell's thoughts on this here.](#)



## Practical Projects for Pandemic Downtime: Database Cleanup and Maintenance

If we can help you bolster any area of your business through these suggestions, that will be pandemic downtime well spent. [Read Part 1 of this series here.](#)

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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 Katie Waters here](#).

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## What's New in the CRM?

May updates included [Search, Database List, Help Center, and Alert Sound updates](#). You can read more about those and other recent updates to the CRM via our Release Notes [here](#).



## What's New in Integrations?

**Avantax**  
Wealth Management<sup>SM</sup>

[Avantax Wealth Management](#) is pioneering the future of comprehensive wealth management with a unique perspective on investing, a growing network of more than 3,500 independent advisors, and over 30 years of industry experience. [Learn more about their new integration with Redtail here](#).

[Pulse360](#) – Hassle-free documentation for financial advisors. Create agendas. Take handwritten notes. Send follow-ups and streamline workflows. All in a fraction of the

time – and from one application. [Details on their new integration with Redtail are available here.](#)



# Veo One®

With [Veo One](#), you can conduct business with flexibility and ease. Research market trends and place trades. View and update client account information in one convenient place. TD Ameritrade Institutional's updated Veo One integration with Redtail provides access to their New Account Wizard and Announcements from within the CRM; [details are here.](#)

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## 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:

[Seamlessly Enable Remote Work for Your Team with Jive](#)

Tuesday, June 2, 10:00 am Pacific

[Segmenting Your Client Data](#)

Thursday, June 4, 11:00 am Pacific

[The Path to Independence: How to Build Your Technology Stack](#)

Friday, June 5, 10:30 am Pacific

[Integration Spotlight Webinar with PreciseFP](#)

Tuesday, June 9, 10:00 am Pacific

[Redtail Essentials: Workflows](#)

Thursday, June 11, 11:00 am Pacific

[Cleaning Up Bad History](#)

Thursday, June 18, 11:00 am Pacific

[New Partner Spotlight - Pulse360](#)

Tuesday, June 23, 10:00 am Pacific

[Using the Facebook Lead Ads Funnel to Increase Lead Generation and Client Conversion Rate with LeadsBridge](#)

Wednesday, June 24, 10:00 am Pacific

[Redtail Essentials: Automations](#)

Thursday, June 25, 11:00 am Pacific

[Best Practice Partner Webinar - Morningstar](#)

Tuesday, June 30, 10:00 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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