

# Redtail News

October 2021



## The Role of Education in Financial Technology Adoption

At Redtail we understand that ongoing education and training opportunities are vital to financial professionals whether you are just beginning to use a new piece of software or you are in the process of ramping up usage to maximize efficiencies. We also understand that not everyone takes in and digests new information in the same way.

Our Director of Training, Rick Williamson, recently shared his thoughts on this topic and how we attempt to address it in our education and training offerings. His tips may spark some ideas for you as well in terms of the trainings you offer to your staff members.



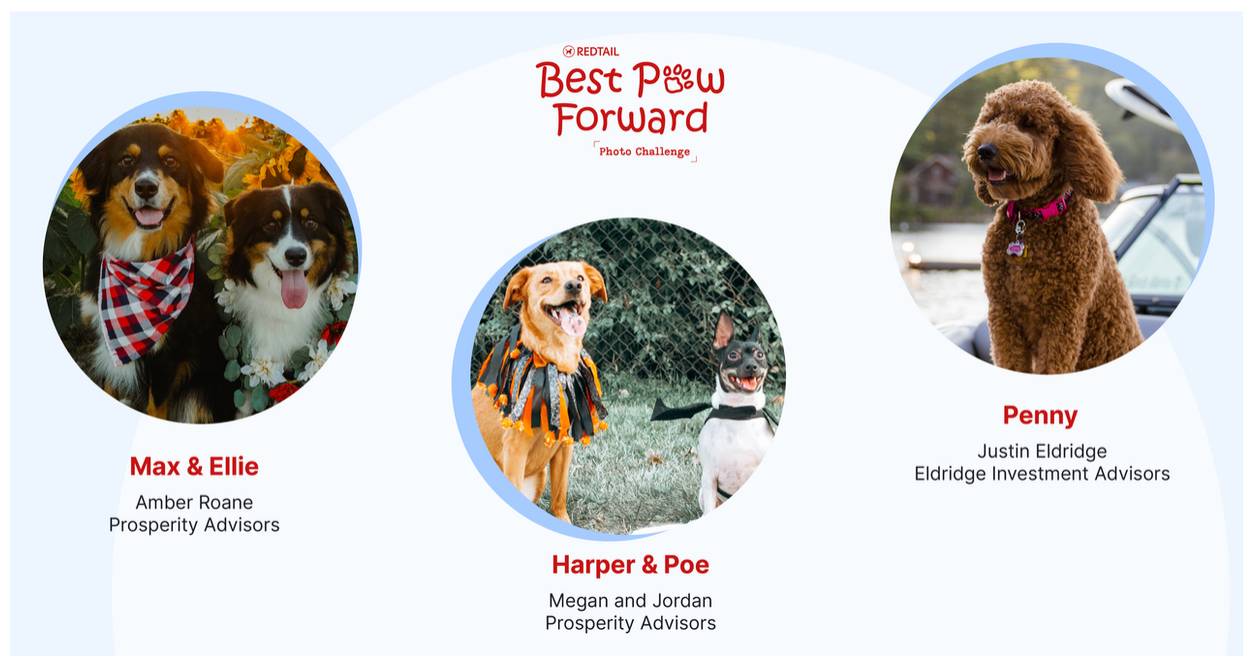
## Redtail hit the podcast circuit in September

Redtail CEO Brian McLaughlin guested on the *Perfectly Integrated* podcast with Matt Ackermann last month for a wide-ranging conversation (including some great tales from the road) you're sure to enjoy and/or learn from.

Our Director of Sales, David Mehlhorn, made a guest appearance last month as well (on the *AFO Wealth Management Forward* podcast) and provided his valuable perspective on using Redtail CRM for client onboarding, client experience, and targeted marketing efforts.

Brian on Perfectly Integrated

David on Wealth Management Forward



## Redtail's Best Paw Forward Photo Challenge September winners

Max and Ellie, Harper and Poe, and Penny came away with the wins in September and will be featured in our assortment of CRM login pages for the month of October! Click below to see the winners and the other contenders from September. [Challenge details available here.](#)

[View winners and all contenders](#)



# Manage Your CRM

## Manage your CRM series: an ongoing Redtail resource

Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the September 2021 installment of this series now:

[How to customize your Dashboard Reminders and Searching preferences](#)

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## What's new in Integrations?



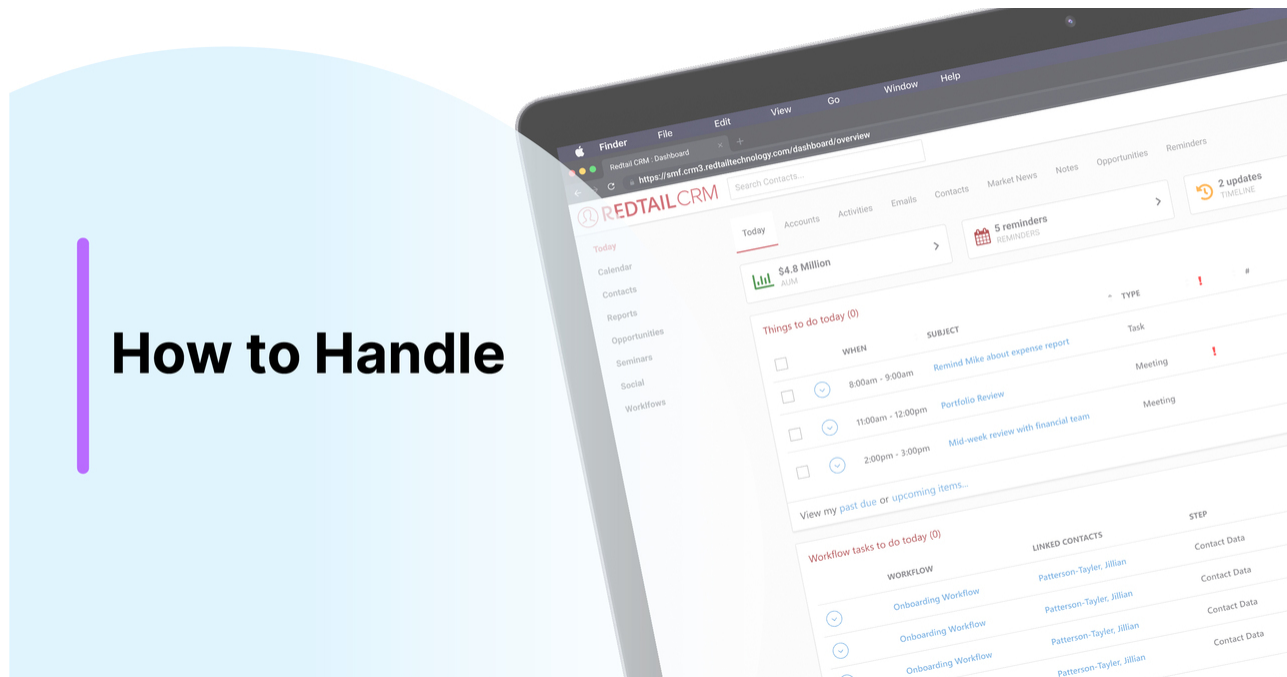
This new integration between [Bento Engine](#) and Redtail CRM triggers automated Bento Advice Packages based upon event/age milestones in your CRM. Alerts will show up as tasks within Redtail CRM to help advisors provide proactive and impactful advice.

[\*\*Learn more >\*\*](#)

This new integration with [Ladder](#) offers advisors

quick and easy access to their Ladder Dashboard and Coverage Calculator from Redtail CRM, as well as the ability to easily send an email Quote invitation to Redtail clients from within the CRM.

[Learn more >](#)



## How to Handle

### Tips from Redtail's Training Team: How to Handle...

Redtail's Training Team puts together these "How to Handle" posts in order to make you aware of some of the ways you might use Redtail CRM to assist with processes, events, etc., that are likely to come up for most offices at one point or another.

[Read "How to Handle Multiple Rep Codes" now!](#)

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



## **Compound Marketing: How to WOW Prospects At Every**

**Touchpoint** - Tuesday, October 5, 11:00am Pacific

[Learn more >](#)

## **New Partner Spotlight - Plain Wealth** - Wednesday, October 6,

10:30am Pacific

[Learn more >](#)

## **Redtail Essentials: Seminars** - Thursday, October 7, 11:00am Pacific

[Learn more >](#)

## **Practice Management Takeover - Kate Guillen, Founder of**

## **Simplicity Operations Management** - Tuesday, October 12, 10:00am

Pacific

[Learn more >](#)

## **How to Handle Prospecting - Part 1** - Thursday, October 14, 11:00am

Pacific

[Learn more >](#)

## **How to Handle Prospecting - Part 2** - Thursday, October 21, 11:00am

Pacific

[Learn more >](#)

## **Redtail Essentials: Mail Merge** - Thursday, October 28, 11:00am

Pacific

[Learn more >](#)

## **Redtail Speak Overview Demo** - Every Monday at 11:00am Pacific

[Learn more >](#)

**Redtail CRM Overview Demo** - Every Tuesday at 11:00am Pacific

[Learn more >](#)

**30 Minute QuickStart** - 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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## Upcoming conferences

Redtail has representatives available at many industry conferences throughout the year. Check out those we plan to attend in the coming months (either virtually or in-person) - we'd love to connect with you if you're in attendance as well.

[See our conference schedule](#)

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## Access Redtail CRM anywhere



**Stay in touch!**



Privacy is important to us; therefore, we will not sell, rent, or give your name or address to anyone. At any point, you can use the link at the bottom of any of our newsletters to opt out from future mailings.

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