

Redtail News

November 2022



ORION + REDTAIL PRODUCT RELEASE

Introducing Redtail Campaigns: Your Virtual Marketer Backed by the Industry's Best CRM

November 9, 11:00am PT / 2:00pm ET



Smarter Marketing Made Easy with Redtail Campaigns

In case you missed it: We were so excited last week to announce [Redtail Campaigns](#), our new marketing solution for advisors, now available during an Early Access period. [You can learn more here about Redtail Campaigns](#) or register for an upcoming webinar introducing the solution in more detail using the button below.

Register for the webinar now!



RELEASE NOTE FOCUS

Reporting now available in Redtail Speak

If you are the database owner for your firm's Redtail Speak account, you now have access to Reporting options on your account.

[Learn more here](#)



More Big Redtail Product News Coming Soon!

Last month it was Redtail Campaigns; look for another huge announcement

regarding Redtail's suite of solutions coming in December!



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 October 2022 installment of this series now:

[Manage Your CRM: Manage Workflow Templates](#)



Larry

Jennifer Garcia
First Capital Advisors Group



Wilma

Jessica Demler
Oxler Private Wealth



Ruby & Ollie

Mike & Heidi Rodenbaugh
Boardwalk Financial Strategies

REDTAIL
Best Paw Forward
Photo Challenge

Redtail's Best Paw Forward Photo Challenge October winners

Larry, Wilma, and Ruby & Ollie are our October winners and will be featured on your CRM login pages for the month of November! Click below to see the winners and the other contenders from October. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

Practice Management Takeover with Adam Cmejla: Virtually unite using workflows for a cohesive client experience

- Tuesday, November 1, 10:00am Pacific

[Learn more >](#)

Introducing Redtail Campaigns: Your Virtual Marketer Backed by the Industry's Best CRM - Wednesday, November 9, 11:00am

Pacific

[Learn more >](#)

How To Handle New Employees - Thursday, November 10, 11:00am

Pacific

[Learn more >](#)

Building Your Tech Stack - TimeLyft: Tracking Time Spent on Clients with TimeLyft and Redtail CRM - Tuesday, November 15,

10:00am Pacific

[Learn more >](#)

Redtail Essentials: Today Page - Thursday, November 17, 11:00am

Pacific

[Learn more >](#)

Building Your Tech Stack - AdvisorStream: How to Drive Growth with AdvisorStream's Scroll-Stopping Marketing

- Tuesday, November 22, 10:00am 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.

Upcoming conferences

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

[View upcoming conferences](#)

Access Redtail CRM anywhere



Stay in touch!

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