

Redtail News

February 2023



CRM Mobile App New Feature: Reminders

Your CRM Reminders are now also displayed in Redtail CRM Mobile

These visual reminders include Client Reviews, Birthdays, Wedding and Client Since Anniversaries, Workflow Tasks, Account Renewals, and Account Riders. Reminders here can be filtered to give you greater control of what is on display at any time.

[Learn more](#)

Speak Updates



Two new Redtail Speak features are now available

We've just rolled out two highly requested updates to the Redtail Speak platform including 1) an allowance for incoming text messages (without an invite) and 2) a Call Forwarding option for Pro level Speak accounts.

[Find out more!](#)



Jolie

Sara Laney
The Roth Companies, Inc.



Kobe Dill & Chinook

Pegah Ghorbani
Align Wealth Advisors

REDTAIL
**Best Paw
Forward**
Photo Challenge



Ruby

Roger Van Pelt
Van Pelt Wealth Advisors

Redtail's Best Paw Forward Photo Challenge

January winners

Jolie, Kobe Dill & Chinook, and Ruby are our January winners and will be featured on your CRM login pages for the month of February! Click below to see the winners and the other contenders from January. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

Using YCharts to Steer Client Meetings in a Down Market

- Tuesday, February 7, 10:00am Pacific

[Learn more >](#)

Tag Groups vs. Keywords vs. UDFs - Thursday, February 9, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Jennifer Goldman - Accelerate Growth and Scalability using Collaboration Tools

- Tuesday, February 14, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Integrations - Thursday, February 16, 11:00am Pacific

[Learn more >](#)

How to Handle Cancelled Appointments - Thursday, February 23,

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 >](#)

New User Intro - Every Wednesday at 11:00am Pacific

[Learn more >](#)

Our webinars are free to users. Bookmark our [Upcoming Webinars](#) 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!

redtailtechnology.com | 800-206-5030



0330-OAT-2/3/2023



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.

Share this email:



[Manage](#) your preferences | [Opt out](#) using TrueRemove®

Got this as a forward? [Sign up](#) to receive our future emails.

View this email [online](#).

3131 Fite Cir
Sacramento, CA | 95827-1801 United States

This email was sent to .
To continue receiving our emails, add us to your address book.

emma

[Subscribe](#) to our email list.