

Redtail News

December 2019

Build Stronger Relationships with these CRM Best Practices

Ricky Redtail's been busy lately. He recently popped up in a guest appearance on the StayPaid podcast to explain why all businesses need to have a CRM—and to offer tips for using one to its fullest potential. [You can check out the video here.](#)



FA Match Alliance Advisor Gratification Survey

Non-owner advisors: we need your help! As you may already know, Redtail is part of the [FA Match Alliance](#), alongside other industry leaders who are passionate about helping advisors find meaningful careers. That's why we encourage you to take this short "Advisor Gratification" survey, which will help us all better understand the ups and downs of advisors' day-to-day job experiences. [You can take the survey here now.](#)

By taking this survey, you could also win \$500 to a non-profit organization of your choice!

What's New in the CRM?

November updates included new Calendar alert preferences, the ability to hide historical Contact Card information, and additions, updates, and fixes for the Seminars and Reporting areas of Redtail CRM. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).



What's New in Integration?



[AdvicePay](#) offers a streamlined, compliant, secure way for advisors to get paid for their advice. Details on the new integration with Redtail are available [here](#), and you can see

the Upcoming Webinars section below to sign up for today's New Partner Spotlight session with AdvicePay.

[e-Relationship](#) is a leading provider of technology-driven email communication tools for clients and prospects of banks, insurance companies and financial services companies. 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:

[New Partner Spotlight - AdvicePay](#)

Tuesday, December 3, 11:00 am Pacific

[Product Overview - Email](#)

Thursday, December 5, 11:00 am Pacific

[Best Practice Partner Webinar - MobileAssistant](#)

Tuesday, December 10, 11:00 am Pacific

[Product Overview - Imaging](#)

Thursday, December 12, 11:00 am Pacific

[Product Overview - Speak](#)

Thursday, December 19, 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!

Redtail University 2020

Dates and locations for Redtail University 2020 were announced recently and we hope you'll be able to join us for one of these fun learning events

in the coming year. If you missed that announcement, [you can see where RTU will be heading here.](#)

February 25, Phoenix, AZ

Our first Redtail University of 2020 is now open for registration.

[Click here to register now!](#)



Conferences

Representatives from Redtail Technology spend a lot of time on the road at both Broker Dealer Conferences and other industry events. Here's a list of those we'll be attending in the coming months:

Money Concepts Annual Planning Conference: December 1-3, Scottsdale, AZ

INC Conference: December 4-5, New York, NY

FSI OneVoice: January 27-29, San Diego, CA

TD Ameritrade National Conference: January 29-31, Orlando, FL



redtailtechnology.com | support@redtailtechnology.com

800-206-5030



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