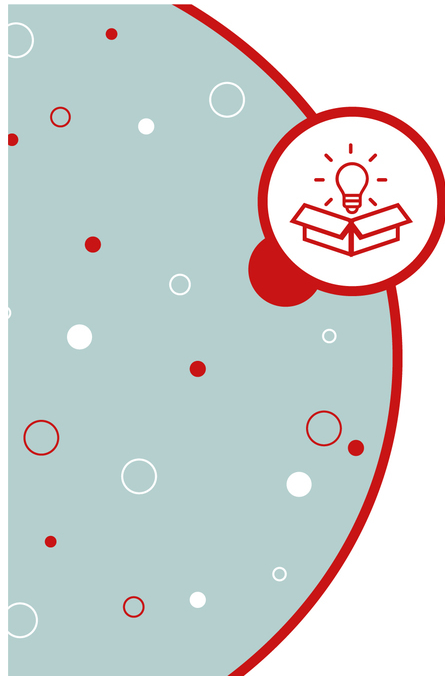


## Redtail News

November 2021

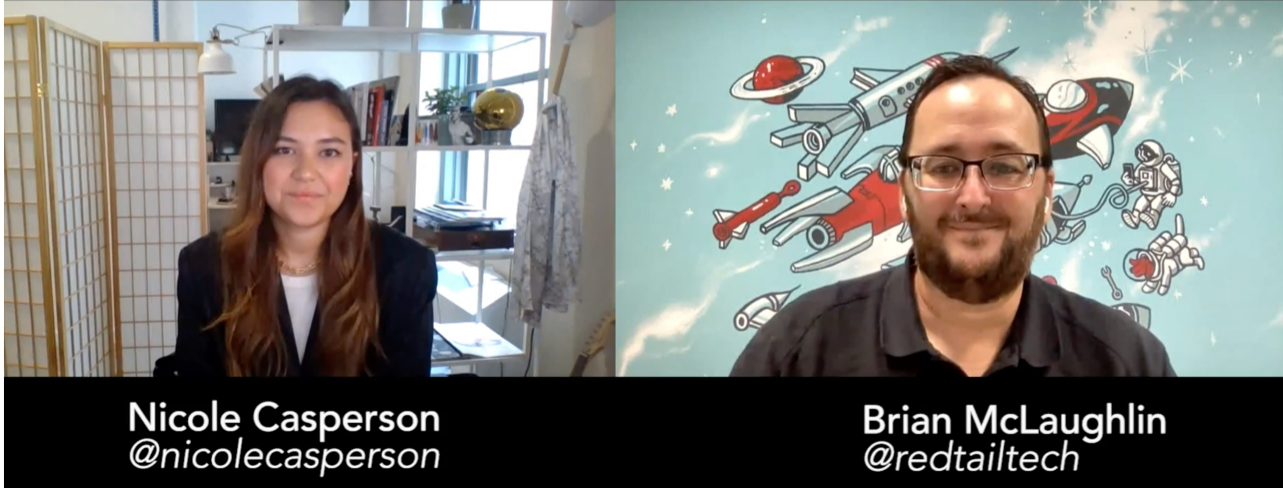


# HOLIDAY RESOURCES

### Redtail CRM Holiday Resources

We've updated our Redtail CRM Holiday Resources guide to provide you with an overview of the many ways you can use Redtail CRM along with many of our integration partners for your holiday season client outreach.

[Redtail CRM Holiday Resources guide](#)



## Pandemic underscores value of CRM

Redtail CEO Brian McLaughlin recently joined Nicole Casperson at *InvestmentNews* for a 3Questions segment. In their short conversation Brian discusses how the pandemic has further underlined the value of CRM's importance in financial services as well as discussing why Redtail so highly values education as a fintech provider.

[Watch it now!](#)

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## Expert Virtual Panel

### Connecting with Meaning: How Personalized Experiences Are Key to Driving Customer Loyalty & Retention

November 3rd, 2021 @ 1:00 PM - 2:00 PM EST



Graham Turner  
CEO



Brian McLaughlin  
CEO/CTO



Keith Gregg  
Founder & CEO



Stephen Barrett  
Chief Content Officer



Matt McGowan  
Director of  
Channel Alliances



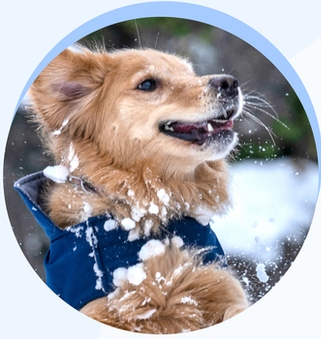
## Driving Customer Retention and Loyalty with Personalized Customer Experiences

Did you know that up to 15% of a business's most loyal customers account for 55% to 70% total revenue?! Over the course of the pandemic, the industry has shifted with more of a focus than ever before on strengthening customer relationships and building loyalty. Consumers have come to expect personalized experiences, and getting this right will not only drive overall revenue growth for your business but also grow loyalty and boost customer lifetime value (CLV).

Join this panel of industry experts on Nov. 3 from 1-2 pm ET as they take a deep dive into the best kept secrets to a personalized customer experience to drive retention and a more profitable practice.

[Register now!](#)

© REDTAIL  
**Best Paw Forward**  
Photo Challenge



**Kaylee**

Allyn Hughes  
BHJ Wealth Advisors



**Sully**

Melissa Cox  
Fetterman Investments



**Cooper**

Lauren Vickers  
FPA Wealth Management

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

Kaylee, Sully, and Cooper 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](#)

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# 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 2021 installment of this series now:

[How to customize your Email preferences](#)

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## What's new in Integrations?



This new integration between [OnBord](#) and Redtail CRM offers contact and task creation within Redtail based upon account openings in Onbord, as well as triggering timestamped notes within Redtail based upon compliance documents being sent via Onbord.

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

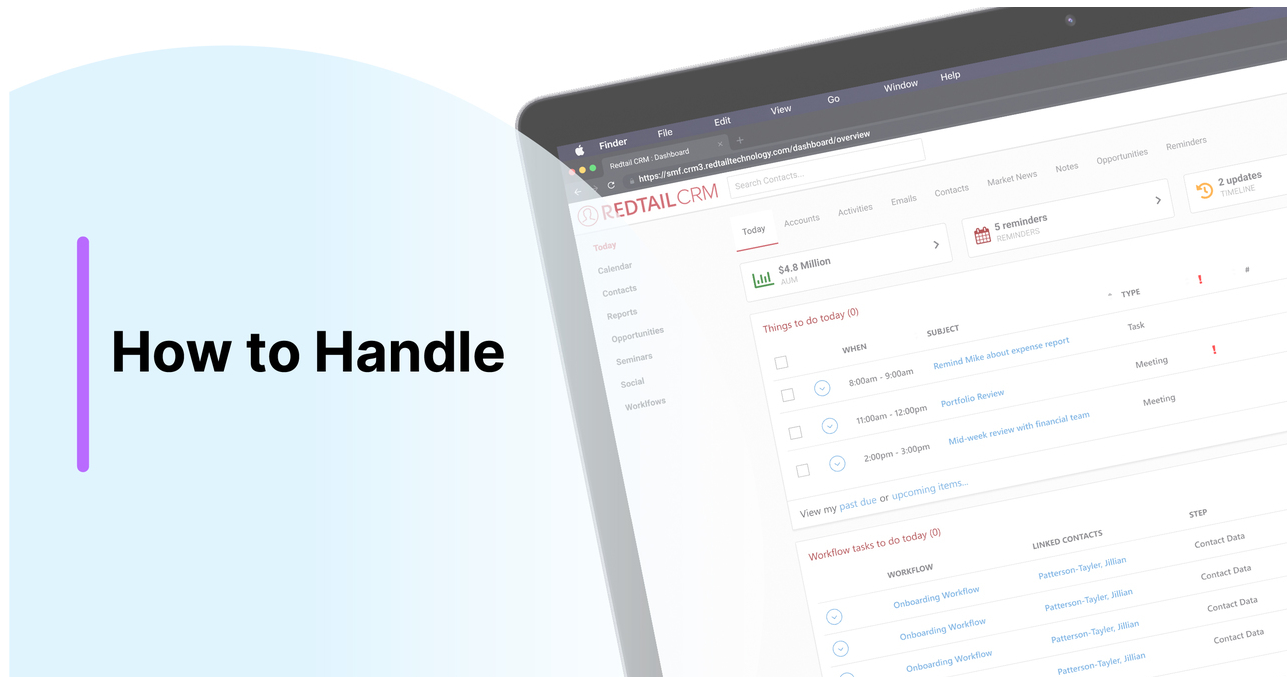


[OryxCloud's](#) new integration with Redtail CRM allows advisors to easily map default and custom fields between the two platforms and to push client



leads from OryxCloud into Redtail CRM as new contacts.

[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 Prospecting" now!](#)

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

**Best Practice Partner Spotlight: Pulse360** - Tuesday, November 2,

10:00am Pacific

[Learn more >](#)

**Connecting with Meaning: How Personalized Experiences Are Key to Driving Customer Loyalty and Retention** - Wednesday,

November 3, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Calendar** - Thursday, November 4, 11:00am Pacific

[Learn more >](#)

**Practice Management Takeover with RIA in a Box** - Tuesday,

November 9, 10:00am Pacific

[Learn more >](#)

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

Pacific

[Learn more >](#)

**New Partner Spotlight - Bento Engine** - Tuesday, November 16,

10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Templates** - Thursday, November 18, 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!**

[redtailtechnology.com](http://redtailtechnology.com) | 800-206-5030





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