

Redtail News

August 2020

What's new in the CRM?

July updates included [the addition of new bulk actions](#) and [more updates aimed at Reg BI compliance](#). You can read more about those and other recent updates to the CRM via our Release Notes [here](#).



Practical projects for pandemic downtime: password managers, integrations, and focus were considered in July

If we can help you bolster any area of your business through these suggestions, that will be pandemic downtime well spent. Read Part 3 of this series on password managers and integrations [here](#). Part 4, which takes a look at fine tuning your focus, is available [here](#).

STRATEGIC PARTNER

**Carson Coaching
Online**



Carson Coaching Online is a learning and community platform for financial advisors.



A special opportunity to join Carson Coaching Online

As a strategic partner of Carson Coaching, we have the opportunity to work with hundreds of advisors as their top choice for a CRM solution. They recently launched the latest version of Carson Coaching Online – a custom-built platform for a community of dedicated advisors serious about growth. As a Redtail subscriber, [you can use the code REDTAIL20 when you sign up](#) for their hub of resources and support designed to help advisors grow professionally and personally.



In January we kicked off our [Advisor Hero campaign](#). If your organization has a story that should be told, we'd love to hear it and potentially share with others as a future installment in our Advisor Hero series. [You can nominate Advisor Hero candidates here.](#) And, [read our latest Advisor Hero story on Chad Staskal here.](#)

What's new in integrations?



[FA Client Machine](#) exists to help financial advisors like you attract and retain more clients by leveraging cutting edge video marketing strategies (powered by

YouTube, Social Media and Email Marketing) to grow your practice quickly. Their new integration with Redtail delivers new leads generated by FA Client Machine to your Redtail CRM database as contacts in real-time. [Learn more about the integration here.](#)

Meet [FP Alpha](#): The first AI-driven wealth management tool that enables financial advisors to deliver the personalized, comprehensive planning experience today's clients are looking for. The new integration with Redtail allows users to bi-directionally sync contact data between the two platforms. [Details on the integration are available here.](#)



[Lightspeed Voice](#) is a leading provider of VoIP phone service that prides itself on its over the top customer service and industry leading integrations. The new integration with Redtail includes contact screen pops

on inbound calls, the insertion of a note with the duration of the call and who answered it, and a link to the recorded call. [Learn more about this integration 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:

[Best Practice Partner Webinar - Red Capture](#)

Tuesday, August 4, 10:00 am Pacific

[Deborah Fox with AdvisorTouch: The Integrated Practice: Managing and Delivering a Robust Practice Management System with Maximum Efficiency](#)

Wednesday, August 5, 10:00 am Pacific

[Redtail Essentials: Notes](#)

Thursday, August 6, 11:00 am Pacific

[Practice Management Webinar with Peter Montoya](#)

Tuesday, August 11, 10:00 am Pacific

[Using The CRM Daily](#)

Thursday, August 13, 11:00 am Pacific

[Redtail Essentials: Reports](#)

Thursday, August 20, 11:00 am Pacific

[Best Practice Partner Webinar - Laserfiche](#)

Tuesday, August 25, 11:00 am Pacific

[How to Handle Client Loyalty](#)

Thursday, August 27, 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!



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