

Redtail News

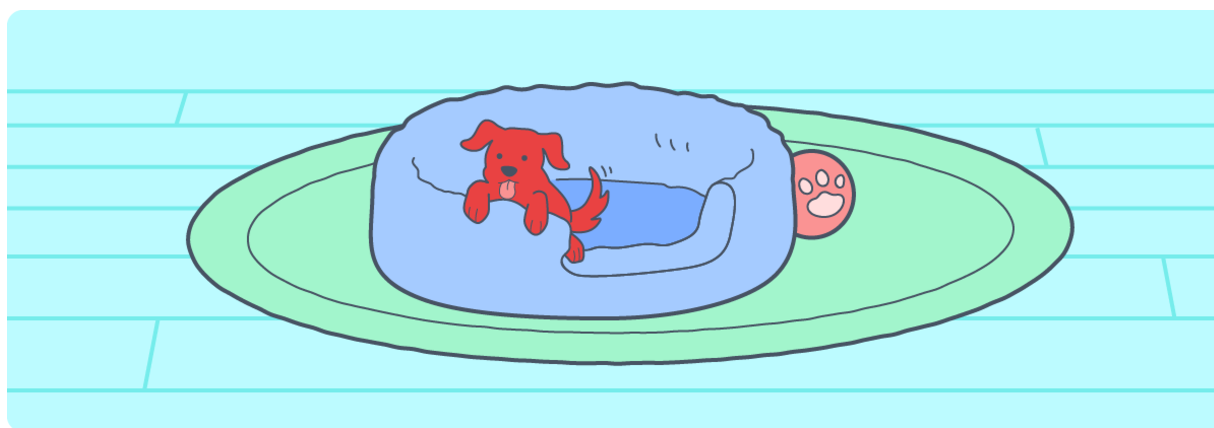
February 2021



Redtail's Best Paw Forward Photo Challenge

Is your pup ready for the spotlight? We've received a ton of positive subscriber feedback for our latest round of login pages, along with requests from many of you to use

photos of your dogs for our CRM login screen. We thought that was a great idea and decided to launch a challenge encouraging you to submit your pup's pics for consideration. [You can find out all the details including how to send in Fido's photo here.](#) We can't wait to meet your dogs!



10 reasons why Redtail CRM may be just the solution you've been looking for

Over the course of this 10-part series on the Redtail blog, our aim is to help you facilitate team buy-in so that your staff will:

- understand the importance of CRM to client experience.

- understand your expectations about how it will be used within your office to manage and maintain processes and data.
- recognize the opportunities it presents to streamline operations and foster business growth.

Even if your office is already firing on all cylinders when it comes to Redtail usage, we hope you can learn something new over the course of this series. And, if you have friends in the industry who are curious about how Redtail CRM may be able to help their business, we encourage you to share a link to the series for their benefit.

The [introduction post](#) along with [Reasons #1](#) and [#2](#) are currently available.



In January 2020, 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 Kendra Erkamaa here.](#)

What's New in Integrations?



[Life Stage Insights](#) is a marketing technology system that enables financial advisors to automate their marketing and client engagement, accelerate prospecting and onboarding, deepen client loyalty, and increase word-of-mouth referrals. The new integration allows you to import contacts

from Redtail into your Life Stage Insights account and begin using their discovery tools and marketing campaigns to reach them. [Learn more about Life Stage Insights and this integration with Redtail here.](#)

[Max for Advisors](#) is an intelligent cash management service that helps your clients earn more on FDIC-insured bank deposits. This integration allows you to send your clients from Redtail to Max. Choosing that option will allow you to initiate the account opening process for that client within Max for Advisors. [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:

[How to Prepare for Client Reviews](#)

Thursday, February 4, 11:00 am Pacific

[Practice Management Takeover with Deborah Fox, CEO and Founder of AdvisorTouch](#)

Tuesday, February 9, 10:00 am Pacific

[New Partner Spotlight - Tifin](#)

Wednesday, February 10, 11:00 am Pacific

[Tag Groups vs. Keywords vs. UDFs](#)

Thursday, February 11, 11:00 am Pacific

[Best Practice Partner Webinar - PreciseFP](#)

Tuesday, February 16, 11:00 am Pacific

[Redtail Essentials: Integrations](#)

Thursday, February 18, 11:00 am Pacific

[How to Handle Cancelled Appointments](#)

Thursday, February 25, 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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Virtual Financial Advisors Summit

While our conference activity is currently scaled back, Redtail Trainer Katherine Beltran will be a presenter at the upcoming [Virtual Financial Advisor Summit 2021: NEXT](#) on Wednesday, February 10. This one-day event takes place 100% online. Best of all...it's totally FREE.

[Learn more about the event, see a full list of presenters, and grab your free pass here.](#)



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