

Redtail News

January 2022



Keep your ears open for a big product update announcement coming soon!

It's a new year, and we'll soon be revealing the first of several major Redtail product announcements you can expect in 2022!



REDTAIL

closed January 17th for
Martin Luther King, Jr. Day

Redtail Technology will be closed on January 17th in observance of the Martin Luther King, Jr. Holiday

While all Redtail offices will be closed on Monday, January 17th, we will monitor our help desk for any urgent tickets that may come into our Support team over the holiday.

**REDTAIL UNIVERSITY LIVE
2022**



Redtail University Live events are back for 2022!

Get your maps and backpacks ready, trailblazers, because **Redtail University LIVE** is once again offering our cross-country, in-person events in 2022! This year, we're celebrating the beauty of our National Parks and using their guiding principles of conservation and growth to teach you about one of the most valuable tools in your office.

You can register now for the Redtail University event below. Registration for future events will open as we get closer to those dates.



[Orange County Registration](#)



**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 December 2021 installment of this series now:

[Understanding the “Switch Database” option](#)

What's new in Integrations?



This new integration between [Catchlight](#) and Redtail CRM enables advisors to easily import their leads and clients from Redtail to Catchlight.

[Learn more >](#)



This new integration between [HubSpot](#) and Redtail CRM offers two-way data sync with filter capabilities and default and custom field mappings.

[Learn more >](#)



[Smith.ai](#) integrates with Redtail CRM so callers' contact information and post-call summaries are instantly added to your Redtail CRM account after each call.

[Learn more >](#)



Bode

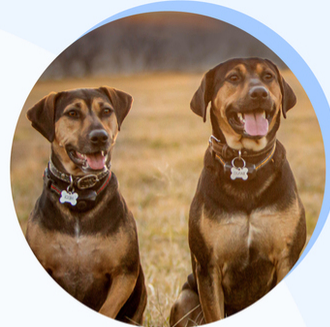
Steve and Lois Davis
Davis Wealth Management

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Best Paw Forward
Photo Challenge



Louie

Anne Sapienza & Tim Johnson
IAG Wealth Partners



Banjo & Heidi

Bethany Longfellow
Ronald Gelok & Associates

Redtail's Best Paw Forward Photo Challenge December winners

Bode, Louie, and Banjo & Heidi are our December winners and will be featured on your CRM login pages for the month of January! Click below to see the winners and the other contenders from December. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

Building Your Tech Stack - PreciseFP - Tuesday, January 4, 10:00am Pacific

[Learn more >](#)

How to Win and Work More Clients with Smith.ai and Redtail
- Wednesday, January 5, 10:00am Pacific

[Learn more >](#)

How To Tackle Data Clean Up - Thursday, January 6, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Manage Your Account - Thursday, January 13,
11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - Ladder - Tuesday, January 18, 10:00am
Pacific

[Learn more >](#)

Tour Of The Contact Record - Thursday, January 20, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Today Page - Thursday, January 27, 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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