

# Redtail News

May 2020

## FinTech CEO Roundtable Webinar Series

In times of challenge or crisis, great companies strive not only to maintain the cultures they've built, but to strengthen them

further. Six industry leaders, including Redtail CEO Brian McLaughlin, joined each other via Zoom on April 2 to talk about [remote working, change management, virtual culture building, leading by example, and much more](#). They continued the conversation on April 9, [discussing team management, technology, and culture, as they relate to remote working](#). The final Roundtable, where they were joined by top advisors, was on April 30 and [focused on what's working and how they're streamlining tech enablement & implementing tech integration](#).



## Redtail's Training from Home Summer Series

As many Redtail users currently find themselves working from home, we wanted to provide an opportunity over the

summer for you to participate in an exclusive, in-depth training focused on some of the ways you can use Redtail CRM more effectively. [More information on these free training opportunities is available here.](#)

## Steadiness stands out in times of disruption

Although we don't yet know the full extent of the COVID-19 pandemic's human toll or its toll on the markets, advisors must be prepared to address their clients' concerns now. Redtail's Director of Sales, David Mehlhorn, shares some ideas on how advisors might go about doing so [in a recent piece over at \*InvestmentNews\*](#).

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## Redtail Q&A with *U.S. News & World Report*

Redtail CEO Brian McLaughlin recently had a Q&A session with Coryanne Hicks at *U.S. News & World Report*. Their conversation included discussion of Redtail's history of designing solutions geared toward helping advisors operate successfully in a remote work environment, among a handful of other topics. [You can read that piece here](#).

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In January we kicked off our [Advisor Hero campaign](#), where we hope to be able to shine a bright light on the amazing stories many of the advisors we work with are writing through the services they are performing in their communities and beyond. We know many of you are going above and beyond to assist your clients and/or your community during this time when needs are so great across the board. If you or someone in 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.](#)

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## What's New in the CRM?

April updates included [Contact Card updates in our mobile app](#), as well as [options to provide you with greater flexibility and control when selecting Workflow Target Dates, Monthly Repeating Activity dates, and Client Review Dates](#). You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).

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## 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:

#### [Your CRM as a Crisis Management Tool](#)

Thursday, May 7, 11:00 am Pacific

#### [New Partner Spotlight - Aidentified](#)

Wednesday, May 13, 10:00 am Pacific

#### [Redtail Essentials: Activities](#)

Thursday, May 14, 11:00 am Pacific

#### [How to Handle Client Death](#)

Thursday, May 21, 11:00 am Pacific

#### [Tailoring your Communication Channels to your Target Market with Advisor Websites](#)

Wednesday, May 27, 10:00 am Pacific

#### [Redtail Essentials: Permissions](#)

Thursday, May 28, 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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