Optimizing Your Practice with Redtail Workflows

Redtail CRM is a powerful tool for financial advisors, providing an efficient way to organize staff tasks and streamline office operations. One of the most valuable features of Redtail is **Workflows**, which help systematize internal processes that follow consistent steps, such as client review preparation, account transfers, and address changes.

The Power of Redtail Workflows

When properly implemented, Redtail Workflows can:

- **Systematize Processes:** Ensure consistency in task execution across the firm.
- **Centralize Productivity & Accountability:** Assign clear responsibilities to team members.
- **Improve Task Management:** Automate task delegation based on workflow triggers.
- **Enhance Client Experience:** Ensure no step is missed in servicing clients.
- **Provide Transparency & Oversight:** Allow advisors to track progress in real time.
- **Facilitate Effective Team Collaboration:** Help teams visualize and manage their workload.

How Redtail Workflows Function

Once created, Redtail Workflows automatically delegate tasks to different team members based on system updates. For example, scheduling a first appointment, changing an email address, or initiating a client review will trigger a predefined workflow, ensuring that all necessary steps are completed efficiently.

Pre-Built Workflow Templates Available

To simplify implementation, we offer 15+ pre-built workflows that can be imported directly into your Redtail CRM. After import, we provide a consultation to customize them to fit your firm's specific needs.

Key Workflow Templates:

- **Client Engagement**
  - 1st Appointment (by phone)
  - 1st Appointment (in person)
  - 2nd Appointment
  - Client Review
  - Workshops
  - Webinars

- **New Business Processing**
  - New ACAT Paperwork
  - New Annuity Paperwork
  - Client Annual Review
  - New Client Onboarding

- **Service Requests**
  - Calendly Appointment
  - Address Change
  - Email Change

- **Operations & Compliance**
  - Death Claim Paperwork
  - Client Termination
  - Tax Appointment
  - Tax Drop Off

Maximizing Workflow Efficiency

To fully benefit from Redtail Workflows, it’s essential that all team members actively engage with them. Best practices include:

1. **Training & Buy-In:** Ensure the entire team understands the importance of workflows and how to use them effectively.

2. **Regular Review Meetings:** Utilize Redtail's Workflow Task Reports in team meetings to track progress and adjust tasks as needed.

3. **Customizing Workflows:** Tailor workflows to align with your specific business processes, ensuring they enhance productivity rather than becoming stagnant.

4. **Automation & Integration:** Leverage Redtail's automation features to trigger workflows based on client actions, reducing manual effort.

5. **Accountability Measures:** Assign ownership to specific tasks and utilize reporting features to monitor completion rates.

Get Started Today!

Implementing workflows on your own can be time-consuming. We've designed these templates so you can implement them quickly and start seeing immediate benefits.

For more information or to schedule a consultation, contact Rebecca Abbitt:
(786) 723-1303
rabbitt@soundincomegroup.com