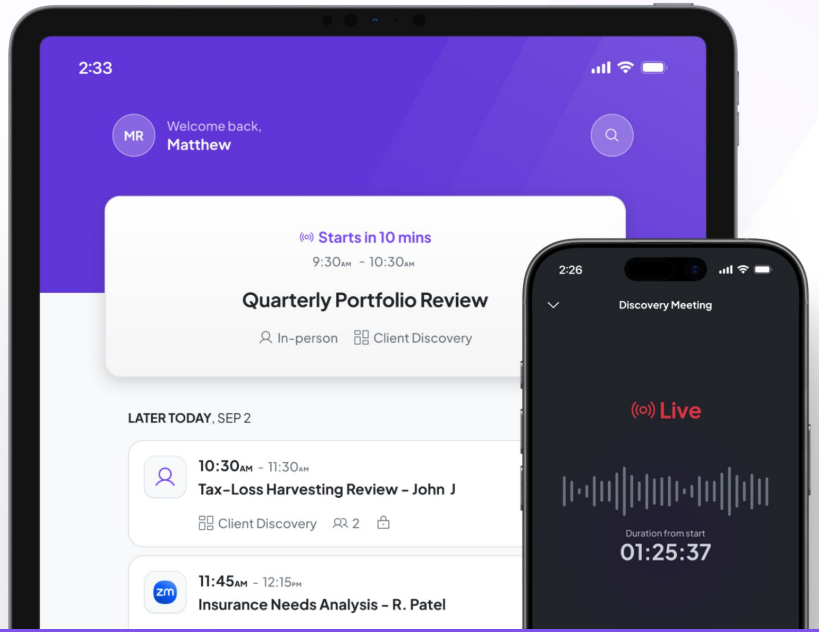
zocks

Structuring Your Data within Zocks

Understanding Meeting Types, Templates, Presets, and Forms.



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The Core Architecture: How four key components power your advisor workflows

The goal isn't just to transcribe a meeting; it's to structure the intelligence within it. By aligning your Meeting Types with specific Templates, Presets and Forms, you turn conversations into actionable insights.

Customization Hierarchy

Understanding how components roll up into Meeting Types vs. Standalone usage.

Presets

ROLLUP

Building blocks that extract predetermined details directly from the **Meeting Transcript**.

Email Templates

ROLLUP

Standardized structures for **Pre- or Post-Meeting Follow-ups** sent to prospects and clients.

Meeting Types

Defines the workflow, naming conventions, and active components for every client interaction.

Summary Templates

ROLLUP

The **Visual Format** for how you see meeting insights after the meeting ends.

Forms

ROLLUP

Structured fields used to capture and map **Clean Data** to CRM objects or PDF's

Contact Library →

Meeting Prep Templates

Generate deep client **insights when a meeting isn't scheduled**, pulling from previous meetings, emails, and integrated sources.

Forms

Gather data and review aggregated client data at any time, **independent** of a scheduled meeting - pulling from previous meetings, emails, and integrated sources.

Understanding the Ecosystem

Meeting Types

Aligns your team's process and connects all other components (Prep, Summary, Presets).

Presets

"Plug & Play" blocks that extract granular insights directly from the meeting transcript.

Forms

Capture clean, structured data for CRM mapping or PDF's. Can be used during meetings or as standalone tools.

Meeting Types: The Connector

Standard Defaults

Out-of-the-box meetings for common advisor processes like Lead-to-Client or Client Reviews.

Partially Customized

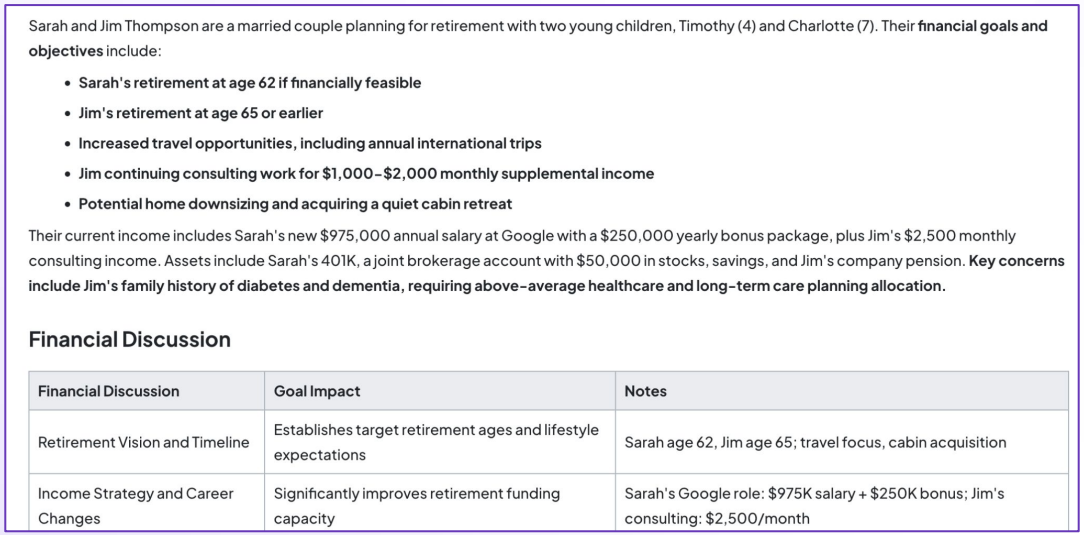
Cloned from defaults. Keeps core outputs but aligns naming to your team's internal nomenclature.

Completely Customized

Brand-new meeting types built from scratch with unique Templates, Presets, and Forms assigned.

Templates: Visualizing Data

- **Pre-Meeting Prep:** Insights on prospects and existing clients before the call.
- **Post-Meeting Summary:** Formats how you see key data and insights after the meeting.
- **Email Templates:** Structured sends for both pre-meeting prep and post-meeting follow-ups.
- Use existing defaults or build your own custom visual format.



Sarah and Jim Thompson are a married couple planning for retirement with two young children, Timothy (4) and Charlotte (7). Their **financial goals and objectives** include:

- **Sarah's retirement at age 62 if financially feasible**
- **Jim's retirement at age 65 or earlier**
- **Increased travel opportunities, including annual international trips**
- **Jim continuing consulting work for $1,000–$2,000 monthly supplemental income**
- **Potential home downsizing and acquiring a quiet cabin retreat**

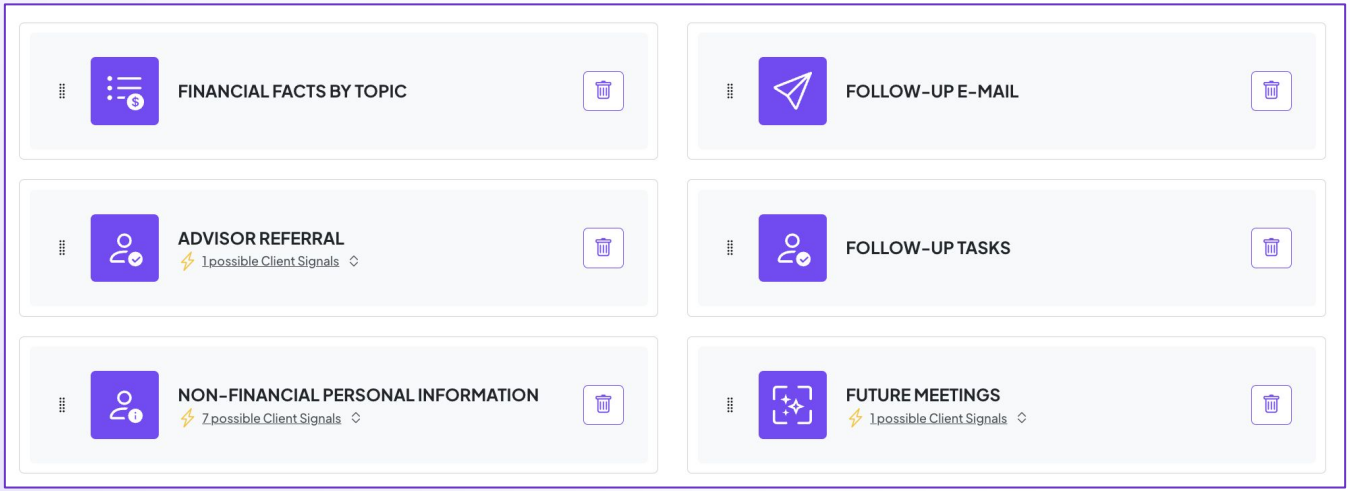
Their current income includes Sarah's new $975,000 annual salary at Google with a $250,000 yearly bonus package, plus Jim's $2,500 monthly consulting income. Assets include Sarah's 401K, a joint brokerage account with $50,000 in stocks, savings, and Jim's company pension. **Key concerns include Jim's family history of diabetes and dementia, requiring above-average healthcare and long-term care planning allocation.**

Financial Discussion

Financial Discussion	Goal Impact	Notes
Retirement Vision and Timeline	Establishes target retirement ages and lifestyle expectations	Sarah age 62, Jim age 65; travel focus, cabin acquisition
Income Strategy and Career Changes	Significantly improves retirement funding capacity	Sarah's Google role: $975K salary + $250K bonus; Jim's consulting: $2,500/month

Presets: Additional Insights (Based on Defined Topics)

- **Granular Data:** Building blocks used to gather specific details from the meeting transcript.
- **Choose to Include:** Add or remove Presets from any Meeting Type as your process evolves.
- **Meeting Details Tab:** All Preset data (e.g., Financial Summary, Referrals) is indexed here for easy retrieval.
- **Automatic Pulling:** Referrals and key action items automatically populate into your Conversation Insights.

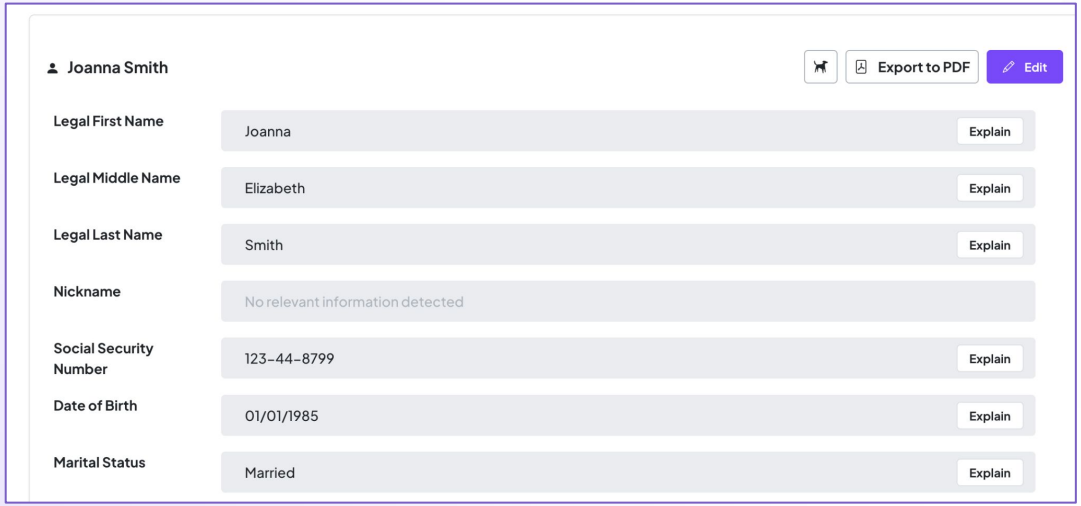


Forms: Structured Data Capture

Forms are your go-to for capturing clean data required for CRM mapping and external workflows.

Fillable fields for PDF printouts or direct CRM object mapping.

Standalone Use: Aggregates data in the Contact Library without needing a meeting.



Meeting Summaries vs Forms

Use Cases Examples	Summaries	Forms
Creating a **new contact** in your CRM or other platform	★	
Updating an **existing contact** in your CRM or other platform	★	
Specific **contact fields** within your CRM to kickoff new workflow (Ex. Account Opening)	★	
Capturing multiples of similar data (income sources, accounts, goals)	★	
Specific fields on **other objects within your CRM** to kickoff new workflow		★
New planning record to monitor fees tied to existing client		★
New client review or suitability record tied to existing client		★
Additional platforms **not currently integrated** with Zocks		★
Producing a fillable PDF (ultimate only)		★

Quick Reference

Component	Primary Goal	Data Source	Usage
Meeting Types	Aligning to Your Process	N/A	Meeting Prep & Post-Meeting
Templates	Visualize Data Option 1	Meeting Transcript (+ Integrations Pre-Meeting)	Meeting Prep & Post-Meeting
Presets	Predefined Insights	Meeting Transcript	Post-Meeting (Details + Insights)
Forms	Visual Data Option 2	Meeting Transcript + Integrations	Post-Meeting + Contact Library

The Meeting Lifecycle + Components

Prep

Templates generate pre-meeting client insights & email. Utilized through specific Meeting Types or Contact Library.

Meeting

Meeting Type dictates which Post-Meeting Summary & Presets are utilized.

Capture

Post-Meeting Summary, Presets, and Forms are structured from the Meeting.

Follow-up

Key Processes are kickstarted by Post-Meeting Summaries, Presets, and Forms.