YOUR 12-WEEK PATH | OCT 27 TO JAN 12

Every client meeting prepared, captured and followed through

In 12 weeks, your team connects Zocks to the tools you already use and builds a routine around it, so your client intelligence stays current: each meeting builds on the last, and every system you use keeps pace with the conversation. Each week brings one live session and a quick-start card you can use right away.

1	2	3	4	5	6	7	8	9	10	11	12
Oct 27	Nov 3	Nov 10	Nov 17	Nov 24	Dec 1	Dec 8	Dec 15	Dec 22	Dec 29	Jan 5	Jan 12
				Holiday				Self-paced	Self-paced		
Month 1: Get set up				Month 2: Make it yours				Month 3: Grow as a team			

MONTH 1

Weeks 1-4 | Get set up

Connect Zocks, run your first meetings and bring in your planning tools.

WEEK 1 Oct 27

Core setup and calendar

Onboarding Path: Before You Begin and Phase 1

IN OFFICE HOURS

Log in with 2FA, connect Outlook Calendar, your CRM and Zoom or Teams, set auto-join and event filters, and invite your assistant.

YOUR QUICK-START CARD

Owner worksheet, Core 3 setup steps, event filter tips and a 14-day transcript reminder.

WHAT CHANGES FOR YOUR PRACTICE

From day 1, you get Meeting Prep before every meeting and your team pushes meeting data to the CRM, so everyone works from one source of truth.

You're ready to move on when: Calendar, CRM and meeting platform show Connected, and your 3 owners are named.

WEEK 2 Nov 3

Before and during the meeting

Onboarding Path: Phase 2

IN OFFICE HOURS

Read the Meeting Prep brief, run a live meeting with Live Agenda and Ask Anything, and see what works best for virtual, in-person and phone meetings.

YOUR QUICK-START CARD

Meeting Prep quick-start, Ask Anything tips and best practices for each meeting format.

WHAT CHANGES FOR YOUR PRACTICE

You walk in prepared and stay focused on the client. Your ops team gets the summary and tasks within minutes, so follow-through never waits on you.

You're ready to move on when: You have run one client meeting end to end.

WEEK 3 Nov 10

After the meeting, every meeting

Onboarding Path: Phase 2 as a habit

IN OFFICE HOURS

Review the summary, work the tasks, push to your CRM and send the follow-up email. Bring your ops team to this session.

YOUR QUICK-START CARD

The post-meeting routine, CRM guides, follow-up email tips and daily best practices.

WHAT CHANGES FOR YOUR PRACTICE

Every commitment from the meeting is captured and assigned, and your ops team works from the CRM instead of chasing you.

You're ready to move on when: Results reach your CRM and the follow-up goes out the same day.

WEEK 4 Nov 17

Planning tools, roles and 30-day check

Onboarding Path: Phase 3

IN OFFICE HOURS

Connect the planning tools you use: eMoney (WealthVision), RightCapital, Holistiplan or Wealth.com. Review suggested plan updates and confirm who owns each step.

YOUR QUICK-START CARD

Planning tool setup, a roles worksheet and your 30-day self-check.

WHAT CHANGES FOR YOUR PRACTICE

Plan, tax and estate data show up in every brief, and your plans stay current with no more rekeying meeting notes.

You're ready to move on when: One plan update is saved from a meeting, and your roles are confirmed.

MONTH 2

Weeks 5-8 | Make it yours

Shape Zocks around how your practice already works.

WEEK 5 Nov 24 Holiday week

Meeting types, prep, templates and forms

IN OFFICE HOURS

Why Meeting Prep matters, how meeting types choose your templates, and a first look at forms with F450. Held early in the week, in two time slots, and recorded.

YOUR QUICK-START CARD

A one-page map of meeting types, templates and forms, plus an F450 walkthrough.

WHAT CHANGES FOR YOUR PRACTICE

Every meeting type preps and summarizes the way you work, so you walk in ready and your ops team gets organized data to act on.

You're ready to move on when: You have picked your most common meeting for Week 6.

WEEK 6 Dec 1

Templates deep dive

IN OFFICE HOURS

Build the template for your most common meeting and assign it to its meeting type. Opens with a quick recap of Week 5.

YOUR QUICK-START CARD

A build-your-first-template guide and a 10-minute exercise.

WHAT CHANGES FOR YOUR PRACTICE

Summaries come out structured the way you already work, so there is less editing before anything goes to the CRM.

You're ready to move on when: You have run one meeting with your new template.

WEEK 7 Dec 8

Forms deep dive

IN OFFICE HOURS

Use Form Fill to complete forms from a meeting, starting with F450 and moving to the forms your practice uses most.

YOUR QUICK-START CARD

Form Fill quick-start and best practices.

WHAT CHANGES FOR YOUR PRACTICE

Details from the conversation fill the form directly, cutting re-entry for your team and back-and-forth with clients.

You're ready to move on when: A completed form has reached your CRM.

WEEK 8 Dec 15

Process walkthroughs

IN OFFICE HOURS

See the full post-meeting routine in one pass: summary, CRM, plan updates, forms and follow-up. Last live session before the holidays.

YOUR QUICK-START CARD

Process walkthroughs and a one-pass routine worksheet.

WHAT CHANGES FOR YOUR PRACTICE

Your post-meeting routine runs the same way, no matter who on your team handles it.

You're ready to move on when: One process is mapped end to end, with an owner for every step.

How the program works

- Each week starts with live office hours hosted by the Zocks Product Success team.
- Every session comes with a one-page quick-start card you can keep at your desk.
- Sessions are recorded, so you can catch up any time.
- Bring your ops team and assistant. Many weeks are built for both of you.

Who should join

- Advisors: every session. You run the meetings Zocks preps and captures.
- Ops and assistants: especially Weeks 1, 3, 4, 7 and 8, where hand-offs and the CRM come in.
- Team leads and owners: Weeks 4, 11 and 12, for roles, coaching and team adoption.

MONTH 3

Weeks 9-12 | Grow as a team

See the whole team, close the gaps and keep it running.

WEEK 9 Dec 22 — On your own time

Client moments: the human side of Zocks

IN OFFICE HOURS

No office hours this week. A short recorded walkthrough is ready whenever it suits you.

YOUR QUICK-START CARD

Ways to make year-end outreach personal with Ask Anything, conversation starters and client sentiment.

WHAT CHANGES FOR YOUR PRACTICE

Clients feel known in the moments that are not about money.

You're ready to move on when: You have made one personal client touch using what Zocks already knows.

WEEK 10 Dec 29 — On your own time

Self-check and catch-up

IN OFFICE HOURS

No office hours this week. Catch up on any recordings from Weeks 5 to 8 and complete your self-check.

YOUR QUICK-START CARD

Your self-check and a catch-up kit with every recording.

WHAT CHANGES FOR YOUR PRACTICE

You see exactly where you stand before January, so the live sessions focus on what you need.

You're ready to move on when: Your self-check is complete by Jan 4.

WEEK 11 Jan 5

Insights and coaching

IN OFFICE HOURS

Welcome back. Meeting Scorecards, Coaching Insights and the Analytics Hub, and how to use them with your team.

YOUR QUICK-START CARD

An insights and coaching guide.

WHAT CHANGES FOR YOUR PRACTICE

You and your team see what is working across every conversation and improve together.

You're ready to move on when: You have reviewed your own score and areas to improve.

WEEK 12 Jan 12

Team clinic and graduation

IN OFFICE HOURS

A live clinic on the most common gaps, bringing every team member onto Zocks, and your personal results recap.

YOUR QUICK-START CARD

Your graduation check and what comes next.

WHAT CHANGES FOR YOUR PRACTICE

Your whole team runs the same process, with your Account Manager as your ongoing partner.

Over the holidays

- Thanksgiving week (Nov 24): a recording of the session will be sent out.
- Weeks of Dec 22 and Dec 29: no office hours. Everything is available on your own time.
- Live sessions resume Jan 5.

Need help?

- Email support@zocks.io with any question, any week.
- Find step-by-step guides at help.zocks.io.

After graduation

- Keep using Zocks with your assigned Account Manager as your ongoing partner.
- Support stays at support@zocks.io.