LPL VIP PROGRAM | WEEK 10 | DEC 29

Tier 2 Self-Audit and Catch-Up

See where you stand before January, on your own time.

Why Week 10 matters

The self-audit shows what is working and what is not after Weeks 5 to 8. Your answers shape the January clinic, so live sessions target real gaps instead of repeating everything.

Async week: no office hours. Complete the self-audit by Jan 4.

Advisor and ops this week

Advisor
Complete the self-audit with your ops partner.

Ops
Bring the ops view: what reaches the CRM, and what still gets typed twice.

Need help over the break?

- Email support@zocks.io any time.
- Every recording stays available on demand.

Tier 2 self-audit

Check what is true for your practice today:

- [ ] A custom template is in use
- [ ] F450 has been completed from a meeting
- [ ] A form beyond F450 is in use
- [ ] Plan updates are saved weekly
- [ ] Meetings are pushed to the CRM the same day
- [ ] Roles are still accurate

You're on track when

By Jan 4:

- [ ] Your self-audit is complete
- [ ] Missed sessions are watched
- [ ] Week 6 exercise is finished

Your catch-up kit

1. **Week 5 recording**
   Meeting types, prep, templates and forms overview.
   Help Center: Meeting types and templates
2. **Week 6 recording and exercise**
   Build one template for your most common meeting.
3. **Week 7 recording**
   Forms deep dive with Form Fill.
   Help Center: Fill in forms
4. **Week 8 recording**
   Process walkthroughs, the post-meeting routine in one pass.

TIP **Do the self-audit with your ops partner. It takes both views to see the gaps.**

Steps teams most often skip

- In-person meetings added under Only Display on Upcoming.
- A follow-up email template duplicated for your most common meeting type.
- Wealth.com estate section added to Meeting Prep templates.
- New templates assigned to a meeting type, not just saved.

How to use your results

- Anything unchecked becomes your January focus.
- Bring your top gap to the Week 12 clinic.

Coming in January

- Jan 5: Insights and coaching, live.
- Jan 12: Team adoption clinic and graduation, live.

Not available at LPL yet
Phone meetings are not yet approved by LPL. Use Zocks for virtual and in-person meetings for now.

Your answers matter
Self-audit results shape the Week 12 clinic.

→ **Next week (live, Jan 5): Insights and coaching.**

Zocks is now available to LPL advisors. Features and integrations are subject to LPL approval.