zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 11 | JAN 5

# Insights and Coaching

See what's working across every conversation, and coach to it.

## Why Week 11 matters

Tier 3 starts with seeing the whole team, not one meeting at a time. Scorecards, coaching insights and the Analytics Hub show trends across meetings, so advisors and team leads improve together.

Welcome back. Built for advisors, team leads and owners.

## Advisor and ops this week

**Advisor**
Review your own score and areas to improve.

**Ops**
Check that every team member is active, and join the coaching review with your team lead.

## Who sees what

**Advisors**
Their own score, history and areas to improve, under Profile, Meeting Score.

**Admins**
Regular users' coaching data, plus Analytics Hub dashboards.

**Owners**
Everyone's coaching data and all Analytics Hub dashboards.

Help Center: Roles and user groups

## You're on track when

By the end of the week:

- [ ] You opened the Scorecard tab on a recent meeting
- [ ] You checked your areas to improve
- [ ] A team lead reviewed Insights, Coaching
- [ ] Every team member was active this week

## Three views to know

1 **Meeting Scorecards**
Each meeting scores 0 to 100 across scheduling, engagement and workflow. See it on Past Meetings or the Scorecard tab.
Help Center: Meeting Scorecards

2 **Coaching Insights**
Insights, Coaching shows each average against a benchmark of 70, plus areas to improve with a Try this tip.
Help Center: Coaching Insights

3 **Analytics Hub**
Practice, advisor and client trends from your meetings, in the left-hand menu for owners and admins.
Help Center: Analytics Hub

TIP **Let Zocks join every client meeting, including phone and in-person. The dashboards depend on processed meetings.**

## Scorecard basics

- Scheduling: time allocation and follow-up bookings.
- Engagement: talk time, sentiment and conversation balance.
- Workflow: agenda use, next steps, tasks and life events.
- A yellow Needs Work tag marks the metrics to focus on.

Help Center: Meeting Scorecards

## Analytics Hub tips

- Use the date filter on the left for built-in or custom ranges.
- Export most list charts as CSV from the three-dot menu.

## Coaching best practices

- Start with people below the benchmark.
- Watch the trend column for people who are slipping.
- Use the Try this suggestions in coaching conversations.
- Turn on sentiment so engagement scores include client sentiment.

**Not available at LPL yet**
Client Queries. Subject to LPL approval.

→ **Next week: team adoption clinic and graduation.**

Questions? Email support@zocks.io.

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