LPL VIP PROGRAM | WEEK 12 | JAN 12

Team Adoption Clinic and Graduation

Close the last gaps, bring the whole team on, and keep it running.

Why Week 12 matters

The clinic targets the gaps your self-audits surfaced. Then we celebrate what your team built. Graduation means the process keeps running without office hours, with your Account Manager as your ongoing partner.

Built for advisors, ops and team leads.

Advisor and ops this week

Advisor
Complete your graduation check and review your results recap.

Ops
Invite any remaining team members and keep the weekly routine going.

Your graduation check

Check what is true for your practice:

- [ ] Core 3 connected
- [ ] Meetings pushed to the CRM every week
- [ ] Planning tool connected and plan updates saved
- [ ] A custom template in use
- [ ] A form beyond F450 in use
- [ ] Roles confirmed
- [ ] Every team member active
- [ ] Insights reviewed

You're done when

By the end of the week:

- [ ] Your graduation check is complete
- [ ] You reviewed your results recap
- [ ] You shared program feedback
- [ ] Next steps are confirmed with your Account Manager

Clinic and graduation agenda

1. **Close the gaps**
   Targeted fixes for the most common self-audit gaps across the cohort.
2. **Bring every team member on**
   Invite from the Team page. Advisor seats for those who run meetings, Admin Assistant seats for those who support them.
   Help Center: Team invites
3. **Your results recap**
   A personal recap of what your practice built during the program.
4. **What comes next**
   Continue on Zocks with your assigned Account Manager.

TIP **Have a story to share? Tell your Account Manager. We are collecting testimonials and case studies from VIP advisors.**

After graduation

- Weekly office hours end.
- Your Account Manager is your ongoing partner.
- Support stays at support@zocks.io.

Keep it running

A suggested rhythm after graduation:

- Weekly: advisor and ops check the post-meeting routine.
- Monthly: team lead reviews Coaching Insights.
- Quarterly: review templates and forms against how you work.

Thank you for being a VIP
Questions after graduation go to support@zocks.io or your Account Manager.

→ **What comes next: keep the rhythm going with your Account Manager.**

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