zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 1 | OCT 27

Core Setup and Calendar

Connect Zocks once, and every client meeting is prepped before it starts.

Why Week 1 matters

Three connections power everything else in the program. Once Outlook Calendar, your CRM and your meeting platform are linked, each client meeting starts with a Meeting Prep brief and ends with notes and tasks ready to push to the CRM, so advisors and ops share one source of truth from day 1.

Built for advisors and their ops team. Bring your assistant to this week's office hours for a live walkthrough.

Before you begin: name your owners

Name one person for each role before you connect anything. Owners decide who preps and who pushes data, so nothing falls between advisor and ops.

Account Owner — Advisor or ops

Manages invites and is the first stop for login issues and setup questions.

Name _____

Meeting Prep — Advisor

Reviews the client brief Zocks creates the night before, in Zocks or from their inbox.

Name _____

Follow-Through — Advisor or ops

Starts Zocks for in-person meetings, reviews the summary, pushes to the CRM and sends the follow-up.

Name _____

Solo advisor? Every answer is "me." You will confirm and expand these roles in Week 4.

You're on track when

By day 7, check each item off:

- [ ] Owners are named for all three roles
- [ ] You have logged in with 2FA
- [ ] Outlook Calendar, CRM and meeting platform all show Connected
- [ ] Auto-join and event filters are set
- [ ] Your assistant has been invited (if you have one)

Log in and connect the Core 3

1. **Log in with 2FA**
   Use your invite email to sign in, then complete two-factor authentication.
   Help Center: Set up 2FA
2. **Connect Outlook Calendar**
   Settings, Integrations, Calendar. Zocks finds your client meetings here and builds Meeting Prep from them.
3. **Connect your CRM**
   Settings, Integrations, CRM. Summaries, tasks and the meeting record are pushed here after each meeting.
   Help Center: CRM guides
4. **Connect your meeting platform**
   Zoom: connect it in Integrations. Microsoft Teams: nothing extra once your calendar is connected.
   Help Center: Zoom and Teams setup

TIP **Connect all three in one sitting, so Meeting Prep and CRM push are ready for your next meeting.**

Set auto-join and event filters

Profile Settings, Meeting Assistant, Event Filter. Tips and best practices:

- Set filters before your first meeting. By default, Zocks joins virtual meetings with 10 or fewer invitees.
- Use event filters to keep internal meetings and personal events out of Zocks.
- Add in-person and phone meetings under Only Display on Upcoming so they still get Meeting Prep.
- Use the switch next to Meeting Prep on Upcoming to override auto-join for one meeting.

Help Center: Event filters

Add your assistant

Invite your assistant or ops partner from the Team page with an Admin Assistant seat, so they can support your meetings from day one.

Help Center: Team invites

Save what matters within 14 days

Transcripts are kept for 14 days, after which the meeting type and templates can't be changed. Summaries and AI-generated data stay for up to 2 years. Push anything important to your CRM within 14 days, since deleted data can't be recovered.

→ **Next week: Meeting Prep the night before, then the live meeting with Live Agenda and Ask Anything.**

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