zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 2 | NOV 3

Before and During the Meeting

Walk in prepared, stay with the client, and let Zocks keep the agenda.

Why Week 2 matters

Week 1 connected your systems. Week 2 puts them to work in a real client meeting: the brief before, the live view during, and the summary after. Advisors stay present with the client, and ops gets a complete record to act on.

Built for advisors and their ops team. Run one client meeting end to end this week.

Advisor and ops this week

Advisor
Review the brief, run the meeting with Live Agenda and try Ask Anything once.

Ops
Confirm auto-join on Upcoming, then review the summary and push to the CRM.

Virtual, in-person and phone

Best practices for each format:

Virtual — Zoom or Teams
Auto-join brings Zocks into meetings with a link. Open the meeting from Live Meetings and click View for prep, agenda, notepad and Ask Anything in one place.

In-person — Desktop or mobile
On Upcoming, use Meeting Tools, then Start Live Meeting. On your phone, tap Quick meeting and allow microphone access.

Phone — Calls
Use Change to Phone on Upcoming, Live or Meeting Prep, then call Zocks or add it to an ongoing call.

You're on track when

By day 14, check each item off:

- [ ] You reviewed the Meeting Prep brief before a client meeting
- [ ] Live Agenda tracked that meeting
- [ ] You tried Ask Anything at least once
- [ ] The summary, tasks and meeting record reached the CRM

Run one meeting end to end

1. **The night before: Meeting Prep**
   On Upcoming, click Meeting Prep next to the meeting. The brief pulls the household summary, goals, past meetings, open tasks and conversation starters.
   Help Center: Meeting Prep
2. **During: the live meeting**
   Prep, agenda, notepad and Ask Anything sit in one view, so you never leave the conversation to look something up.
   Help Center: Live meetings | Mobile app
3. **During: Live Agenda**
   Use a meeting type with Agenda Tracking turned on. Items check off as you cover them, and anything missed becomes a follow-up task.
   Help Center: Agenda Tracking
4. **After: review and push**
   Review the summary and tasks, then push to your CRM. Week 3 goes deeper on this step.
   Help Center: CRM guides

TIP **Add meeting contacts to Zocks and link them to their CRM records for the most complete prep.**

Ask Anything tips

Ask Anything answers from Zocks data plus your connected integrations. Examples:

- Before a meeting: open the contact and ask what has changed since you last met.
- Unplanned touch: a client walks in, emails or calls. Ask Anything catches the team up before anyone responds.
- During a meeting: pull up client context without breaking the conversation.
- Click View on an answer to see the meeting it came from.

Help Center: Meeting Prep

Good habits

- If a client declines, use Remove AI assistant.
- If you change the meeting type, rerun Meeting Prep.
- Participants who never speak will not appear in the summary.

Zocks transcribes. It never records.
Clients don't want sensitive financial conversations recorded, and neither do compliance teams. Zocks captures the conversation without recording audio or video.

→ **Next week: after the meeting, every meeting. Summary review, tasks, CRM push and the follow-up email.**

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