LPL VIP PROGRAM | WEEK 3 | NOV 10

After the Meeting, Every Meeting

Every commitment captured, assigned and in the CRM, without waiting on the advisor.

Why Week 3 matters

The minutes after a meeting decide whether clients get the follow-through you promised. This week turns review, tasks, CRM push and the follow-up email into a routine that ops can run without chasing the advisor.

Built for advisors and the Follow-Through owner you named in Week 1. Ops should attend this week.

Advisor and ops this week

Advisor
Approve the summary and send the follow-up email the same day.

Ops
Work the tasks and push the meeting record to the CRM the same day.

Who does what after the meeting

Write in your team, then keep it the same for every meeting:

Review the results	Advisor or ops
Name	
Work the tasks	Follow-Through owner
Name	
Push to the CRM	Advisor or ops
Name	
Send the follow-up email	Advisor
Name	

You're on track when

By day 21, check each item off:

- [ ] Results are reviewed within a day of each meeting
- [ ] Tasks and the meeting record reach the CRM
- [ ] Follow-up emails go out the same day
- [ ] Advisor and ops agree on the daily routine

The post-meeting routine

1 Review the results

When a meeting ends, Zocks opens the past meeting. Review the presets on Meeting Details. Highlight any result and click Explain to see where it came from.

Help Center: Review results and tasks

2 Work the tasks

Edit tasks with the pencil icon, mark them complete, or send them to your CRM in one click.

3 Push to the CRM

Push the meeting record and tasks so the client record is current for the whole team.

Help Center: CRM guides

4 Send the follow-up

Zocks drafts a follow-up email with action items for the client and the advisor. Edit it in the past meeting, then send.

Help Center: Follow-up email

TIP **You can still edit any follow-up email in the past meeting before you send it.**

Daily best practices

- Morning: check Upcoming and confirm auto-join for the day.
- Before each meeting: review the Meeting Prep brief.
- Same day: review, push to the CRM and send the follow-up.
- End of day: clear open tasks or send them to the CRM.

Make the follow-up email yours

- Setup, Meeting Types: duplicate the Follow-Up Email template to match your voice.
- Keep bracketed placeholders like [Recipient's Name]. Zocks fills them in.

Help Center: Follow-up email

Push within 14 days
Transcripts are kept for 14 days. A same-day push keeps every meeting safely in your CRM.

→ **Next week: connect your planning tools and confirm your team roles.**

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