LPL VIP PROGRAM | WEEK 5 | NOV 24

Meeting Types, Prep, Templates and Forms

One map of how Zocks shapes every meeting, from the brief to the CRM.

Why Week 5 matters

Tier 2 starts here. A meeting type decides which prep, summary and follow-up templates a meeting gets, and which forms fill from it. Get the map right, and advisors walk in ready while ops receives structured data to act on.

Holiday week: office hours run early in the week, in two time slots, and are recorded.

Advisor and ops this week

Advisor
Pick your most common meeting for Week 6 and review a full brief.

Ops
Check which summary fields reach the CRM, and try F450 on an eligible meeting.

Why Meeting Prep matters

Every brief gives you, in one place:

- Household summary and financial goals
- Conversation starters from past discussions
- Past meetings and open tasks for advisor and client
- A proposed agenda

Clients feel known when you pick up where you left off. Planning data appears when your template asks for it.

You're on track when

By the end of the week:

- [ ] You watched the session, live or recorded
- [ ] You picked your most common meeting for Week 6
- [ ] Advisor and ops reviewed what lands in the CRM
- [ ] You completed F450 from an eligible meeting

How it fits together

1. **Meeting types**
   Setup, Meeting types. System types include Discovery Meeting, Client Review and Plan Proposal, or create your own.
   Help Center: Meeting types and templates
2. **Prep and summary templates**
   Each meeting type has its own templates. The summary shapes what lands in the CRM, which is what ops works from.
3. **Forms**
   Add a form to a meeting type and it fills after the meeting. Find it under Past Meetings, View Meeting, Form tab.
   Help Center: Fill in forms
4. **F450**
   F450 is already in every LPL advisor account. Use it as your first form from an eligible meeting.

TIP **Use consistent calendar titles, for example "Client Review", so Zocks suggests the right meeting type.**

What's inside a meeting type

- Presets: the data Zocks captures from the meeting.
- Templates: one per meeting type for prep, summary and follow-up.
- Agenda Tracking: turn it on per meeting type for Live Agenda.
- Forms: attach the forms that should fill after the meeting.

Help Center: Meeting types and templates | Agenda Tracking

Missed the session?

- Watch the recording before Week 6.
- Week 6 opens with a 5-minute recap.
- Questions over the holiday: support@zocks.io.

Before Week 6
Pick your most common client meeting. You'll build its template next week.

→ **Next week: Templates deep dive. Build the template for your most common meeting.**

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