zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 6 | DEC 1

Templates Deep Dive

Summaries that come out the way your practice already works.

Why Week 6 matters

System templates work out of the box. Custom templates make every brief, summary and follow-up match how your practice runs, so advisors and ops edit less before pushing to the CRM.

Built for advisors and ops. Bring your most common meeting type.

Advisor and ops this week

Customize one process first, based on your highest priority:

Pick your priority
Is it a different Meeting Prep or agenda? Or a different format for notes from a specific meeting? Choose the one change that would help most.

Build it out
Customize that one template, assign it to its meeting type and run it on your next meeting.

Name a template owner Best practice
One person in your office builds templates and shares them with the team.

Name _____

Missed last week?

Week 5 in 30 seconds:

- A meeting type picks its prep, summary and follow-up templates.
- Forms fill from meeting types.
- F450 is ready in your account.

Watch the Week 5 recording, then start here.

You're on track when

By the end of the week:

- [ ] You built a template for your most common meeting
- [ ] It is assigned to that meeting type
- [ ] You ran one meeting with it
- [ ] Wealth.com users added an estate planning section

Build your first template

1 **Duplicate**
Setup, Templates. Duplicate a system or team template to create your own.
Help Center: Meeting types and templates

2 **Edit**
Use the AI Template Assistant for new templates or big changes. Edit manually for small tweaks.

3 **Assign**
Setup, Meeting types, select the type, gear icon, then scroll to Templates.

4 **Test**
Run your next meeting of that type and review the summary with ops.

TIP **Start with one meeting. Reviews, discovery and service calls can follow.**

Good places to start

Duplicate a system meeting type you already run: Client Review, Discovery Meeting, General Client Check-In or Plan Proposal.

What you can customize

- Meeting Prep template and Meeting Prep email
- Meeting summary and follow-up email
- Agenda templates (account, team or user level)

Help Center: Meeting Prep | Agenda Tracking

Best practices

- Admins and owners can assign templates to users or groups with Assign to users.
- Your Choice overrides the account default for your own meetings.
- Keep calendar titles consistent so Zocks picks the right meeting type.

Help Center: Meeting types and templates

10-minute exercise
Build one template for your most common meeting and run it once before Week 7.

→ **Next week: Forms deep dive with Form Fill.**

Questions? Email support@zocks.io.

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