zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 7 | DEC 8

Forms Deep Dive

Details from the conversation fill the form, so nobody types them twice.

Why Week 7 matters

Forms are where re-entry eats time, and that work usually lands on ops. Forms are the best way to capture clean, structured new data. Form Fill uses the meeting, past meetings, your CRM and other connected platforms to complete them.

Built for advisors and the Forms and Hand-Offs owner, often ops.

Advisor and ops this week

Advisor
Add F450 and one more form to the right meeting types.

Ops
Review completed forms and push them to the CRM.

Two ways to fill a form

After a meeting — Most common
Add the form to a meeting type. After the meeting, open Past Meetings, View Meeting, Form tab.

On demand — Existing clients
Library, Contacts, select the client, then Form Fill from the AI Assistant menu. Uses your CRM, other connected platforms and past meetings.

Best practices

- Create a dedicated meeting type for each recurring workflow.
- Use on-demand Form Fill to complete missing data for existing clients.
- Decide whether each client on a call gets a separate form or one form covers everyone.

Help Center: Fill in forms

You're on track when

By the end of the week:

- [ ] F450 completed from an eligible meeting
- [ ] One more form added to a meeting type
- [ ] A completed form pushed to the CRM
- [ ] Your Forms and Hand-Offs owner has run one

Fill a form from a meeting

1. **Find your forms**
   Setup, Forms. System forms work out of the box. Clone one to customize, or add a new form.
   Help Center: Fill in forms
2. **Add it to a meeting type**
   Attach the form to the meeting type you use for that workflow.
3. **Review after the meeting**
   Open the Form tab on the past meeting and edit anything that needs it.
4. **Push to the CRM**
   Custom forms save to the CRM as Notes by default.

TIP **Write clear label descriptions. Form Fill relies on them to find the right answer.**

Where forms work best

Use a form when you need clean, new data in a set structure. Most usage today:

- Network-specific forms, like F450 (already in every LPL advisor account)
- Suitability and compliance
- Tax prep

Start with F450, then add the form your practice fills most often.

Get more from each form

- Label names and descriptions guide the AI Assistant, so keep them specific.
- Each row can use its own label type, such as text or number.
- Field-level mapping to CRM contact fields is available on request.
- On-demand Form Fill pulls from your CRM, other connected platforms and past meetings.

Help Center: Fill in forms

Not available at LPL yet
PDF-filled forms. Form Fill in Zocks is approved and ready to use.

→ **Next week: process walkthroughs, the full post-meeting workflow in one pass.**