zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 8 | DEC 15

Process Walkthroughs

Summary, CRM, plan and form, handled in one pass after every meeting.

Why Week 8 matters

Weeks 5 to 7 built the pieces. This week puts them together into the processes your practice runs most, so the post-meeting routine is the same no matter which advisor or ops team member handles it.

Last live session before the holidays. Advisors and ops together.

Advisor and ops this week

Advisor
Walk your most common meeting through the one-pass routine.

Ops
Own the hand-offs: tasks, plan updates, forms and the CRM push.

The one-pass routine

Write in the owner for each step:

Review the summary
Name _____

Send tasks to the CRM
Name _____

Approve plan updates
Name _____

Complete forms
Name _____

Send the follow-up
Name _____

You're on track when

By Dec 19:

- [ ] One process is mapped end to end
- [ ] Every step has a named owner
- [ ] Plan updates were saved after meetings this week
- [ ] You know what is due over the break

This week's walkthroughs

1. **Example: client review**
   Prep with planning data, Live Agenda, summary to the CRM, plan updates approved, follow-up sent.
2. **Example: new client discovery**
   Discovery meeting type, intake form filled from the conversation, new contact created in RightCapital if you use it.
3. **Your process**
   Pick the meeting your practice runs most and map each step to an owner.

TIP **Write the process down once. A process on paper survives a busy week and a new hire.**

Signs the process works

- Summaries reach the CRM the same day.
- Plan updates are approved every week.
- Nobody types the same detail twice.
- Anyone on the team can pick up a meeting and finish it.

Tools that keep it moving

- Agenda Tracking: missed agenda items become follow-up tasks.
- Follow-up email templates: one per meeting type, in your voice.

Over the break

- No office hours the weeks of Dec 22 and Dec 29.
- Week 9: Client moments, async.
- Week 10: Tier 2 self-audit and catch-up, async.
- Live sessions resume Jan 5.

Before you log off for the holidays
Push every open meeting to the CRM. Transcripts are kept for 14 days.

→ **Next week (async): Client moments, the human side of Zocks.**

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