LPL VIP PROGRAM | WEEK 9 | DEC 22

Client Moments: The Human Side of Zocks

Use what Zocks already knows to make year-end outreach personal.

Why Week 9 matters

Clients feel known in the moments that aren't about money. Everything you need for a personal year-end touch is already in Zocks: conversation starters, past meetings and how clients felt in them.

Async week: no office hours. A short recorded walkthrough is available on demand.

Advisor and ops this week

Advisor
Make one personal client touch using what Zocks already knows.

Ops
List anything still open from Weeks 5 to 8 for the Week 10 catch-up.

Questions to try

Examples for Ask Anything before a holiday call:

- What did this client share about family or plans last time?
- Which life events came up this year?
- What is still open from our last meeting?

You're on track when

By the end of the week:

- [ ] You used Ask Anything before one client touch
- [ ] You used a conversation starter from a brief
- [ ] You checked sentiment on recent meetings
- [ ] Anything open from Weeks 5 to 8 is on your list for Week 10

Three ways to make it personal

1 Ask Anything before you call
Open the contact, type your question and click Ask Anything. Click View to see the meeting it came from.
Help Center: Meeting Prep

2 Conversation starters
Every Meeting Prep brief includes personal and financial icebreakers from past discussions.

3 Spot who needs a check-in
Sentiment scores each meeting positive, neutral or negative. Open a past meeting to see it, and owners and admins can view trends in the Analytics Hub.
Help Center: Sentiment analysis

TIP **Sentiment applies to new meetings once it is turned on in Setup, Settings, AI Assistant.**

Ideas for a year-end note (examples)

- Reference a goal the client shared this year.
- Mention a milestone from a past meeting.
- Close the loop on something still open.

Sentiment, used well

- Personalize follow-ups to how a client felt in the meeting.
- Watch for retention signals in negative trends.
- Add the Conversation Timeline preset to map sentiment to topics.

Help Center: Sentiment analysis

Behind on anything?

- Recordings for Weeks 5 to 8 are in the catch-up kit.
- Week 10 is set aside to catch up and complete your self-audit.

Light by design
No setup this week. Use what Zocks already has to make one client feel known.

→ **Next week (async): Tier 2 self-audit and catch-up.**

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