# Redtail CRM Scorecard.

IN COORDINATION WITH REDTAIL

Take the assessment to determine if you're getting the most out of Redtail CRM. Explore additional training sessions or submit a request if you think you could benefit from additional Redtail training or features.

| DATA INFRASTRUCTURE | YES | NO | IF "NO" |
|---|---|---|---|
| Do you trust your data? | | | › Develop consistent data entry<br>› Perform a CRM cleanup |
| Can you audit your data? | | | › Utilize activity and note templates |
| Do you have a defined list of identifiers you use for your clients accounts & notes? | | | › Establish keywords and user defined fields |
| Are your identifiers used consistently? | | | › Define a process with your team |
| Is your data organized in a way that is useful for your business? | | | › Utilize reminders, client & account tags/fields |

**PUT IT TO THE TEST**

- ☐ Professional relationships, i.e. affiliations, should be searchable. Pull a list of all your professional COIs
- ☐ Now find how many of your clients are missing an email address on file
- ☐ Locate a full list of custom fields tagged for personalization. Client e.g. Alma Mater, drink preference; account e.g. check writing, contribution

| REPORTING/COMPLIANCE | YES | NO | IF "NO" |
|---|---|---|---|
| Can you utilize Redtail reports to understand & take efficient action at scale? | | | › Utilize custom reports, exports, advanced search |
| Are there reports you can run to scale personalization? e.g. mailing lists | | | › Utilize bulk actions |

**PUT IT TO THE TEST**

- ☐ Reporting helps streamline important processes across clients accounts. Can you pull a list of all Inherited IRA accounts you manage that are required to take an RMD this year?
- ☐ Pull a list of clients that have had no contact, activities or communication in the past 6 months

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Visit SEI's Growth Lab, for actionable practice management advice and tools.

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| ACTIVITY MANAGEMENT | YES | NO | IF "NO" |
|---|---|---|---|
| Are you tracking activities and tasks in your Redtail? | | | › Utilize workflows<br>› Utilize Redtail opportunities |
| Are your operations running efficiently, providing consistency, and transparency into your operations? | | | › SEI+Redtail Workflow Integration Guide<br>› Watch the lesson<br>› Utilize alerts/notifications, automations, calendar syncs & mail merge templates |
| Can you point to where your service model exists within each of your workflows/activities? | | | › Define a service model<br>› Watch the lesson |
| Are you using your activity data to improve efficiency and productivity? | | | › Develop an ongoing review process |

**PUT IT TO THE TEST**

- ☐ Activities from your email & calendar need to be tracked. Confirm you have your email and calendar activities synced to your Redtail
- ☐ Find all tasks or activities in your firm that are past due
- ☐ Identify the # of tasks assigned to any given staff member. Tip: this may be an opportunity to delegate effectively
- ☐ Pipeline management should provide valuable insight to your sales process. Find how many opportunities are set to close in the next 30 days

| INTEGRATIONS | YES | NO | IF "NO" |
|---|---|---|---|
| Technology should add scale to your operations. Are your Redtail integrations providing value by automating processes and/or data entry? | | | › Redtail Integration Partners<br>› Perform a Tech Stack Review<br>› CRM Integration Diagram |

**PUT IT TO THE TEST**

- ☐ Integrations are two sided. Can you find your settings which show integrations turned on in your Redtail?
- ☐ Now check your third party tech provider. Is the integration turned on in those settings?