REDTAIL UNIVERSITY

Example Workflow Processes

Activity based:

Client Meeting
Client Review
On-boarding Meeting
Prospect Meeting
Seminar/ Event Planning

Annually or quarterly:

Contact Clean-up
Compliance/ Internal Audit
Holiday Correspondence
Newsletter
RMDs for all Clients

Account based:

Account Closing
Account Opening
Beneficiaries Addition/ Update
Insurance
IRA Distribution
Money Movement
RMDs
Rollover

Contact based:

Client Divorce
Deceased Client
Family Addition
Inactive Client
New/Change Address
New/Change Email Address
New/Change Phone Number
New Opportunity
Prospect Call Cadence
Referral
Required Fields for Clients
Required Fields for Family of Clients

User based:

Employee Departure
Event Planning
New Employee
Supply Prep
Travel Prep

**The processes listed above are the most popular and recommended to be added as "Templates" within the CRM. But, there is always an option to "Create with no template" for a to-do list or one time process. And as a bonus—the one-off workflow does have the option to be "Saved as a template" for future use.*