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QUICK-START CARD

LPL VIP PROGRAM | WEEK 1 | OCT 27

Core Setup and Calendar

Connect Zocks once, and every client meeting is prepped before it starts.

Why Week 1 matters

Three connections power everything else in the program. Once Outlook Calendar, your CRM and your meeting platform are linked, each client meeting starts with a Meeting Prep brief and ends with notes and tasks ready to push to the CRM, so advisors and ops share one source of truth from day 1.

Built for advisors and their ops team. Bring your assistant to this week's office hours for a live walkthrough.

Before you begin: name your owners

Name one person for each role before you connect anything. Owners decide who preps and who pushes data, so nothing falls between advisor and ops.

Account Owner — Advisor or ops

Manages invites and is the first stop for login issues and setup questions.

Name _____

Meeting Prep — Advisor

Reviews the client brief Zocks creates the night before, in Zocks or from their inbox.

Name _____

Follow-Through — Advisor or ops

Starts Zocks for in-person meetings, reviews the summary, pushes to the CRM and sends the follow-up.

Name _____

Solo advisor? Every answer is "me." You will confirm and expand these roles in Week 4.

You're on track when

By day 7, check each item off:

- [ ] Owners are named for all three roles
- [ ] You have logged in with 2FA
- [ ] Outlook Calendar, CRM and meeting platform all show Connected
- [ ] Auto-join and event filters are set
- [ ] Your assistant has been invited (if you have one)

Log in and connect the Core 3

1. **Log in with 2FA**
   Use your invite email to sign in, then complete two-factor authentication.
   Help Center: Set up 2FA
2. **Connect Outlook Calendar**
   Settings, Integrations, Calendar. Zocks finds your client meetings here and builds Meeting Prep from them.
3. **Connect your CRM**
   Settings, Integrations, CRM. Summaries, tasks and the meeting record are pushed here after each meeting.
   Help Center: CRM guides
4. **Connect your meeting platform**
   Zoom: connect it in Integrations. Microsoft Teams: nothing extra once your calendar is connected.
   Help Center: Zoom and Teams setup

TIP **Connect all three in one sitting, so Meeting Prep and CRM push are ready for your next meeting.**

Set auto-join and event filters

Profile Settings, Meeting Assistant, Event Filter. Tips and best practices:

- Set filters before your first meeting. By default, Zocks joins virtual meetings with 10 or fewer invitees.
- Use event filters to keep internal meetings and personal events out of Zocks.
- Add in-person and phone meetings under Only Display on Upcoming so they still get Meeting Prep.
- Use the switch next to Meeting Prep on Upcoming to override auto-join for one meeting.

Help Center: Event filters

Add your assistant

Invite your assistant or ops partner from the Team page with an Admin Assistant seat, so they can support your meetings from day one.

Help Center: Team invites

Save what matters within 14 days

Transcripts are kept for 14 days, after which the meeting type and templates can't be changed. Summaries and AI-generated data stay for up to 2 years. Push anything important to your CRM within 14 days, since deleted data can't be recovered.

→ **Next week: Meeting Prep the night before, then the live meeting with Live Agenda and Ask Anything.**

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

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QUICK-START CARD

LPL VIP PROGRAM | WEEK 2 | NOV 3

Before and During the Meeting

Walk in prepared, stay with the client, and let Zocks keep the agenda.

Why Week 2 matters

Week 1 connected your systems. Week 2 puts them to work in a real client meeting: the brief before, the live view during, and the summary after. Advisors stay present with the client, and ops gets a complete record to act on.

Built for advisors and their ops team. Run one client meeting end to end this week.

Advisor and ops this week

Advisor
Review the brief, run the meeting with Live Agenda and try Ask Anything once.

Ops
Confirm auto-join on Upcoming, then review the summary and push to the CRM.

Virtual, in-person and phone

Best practices for each format:

Virtual — Zoom or Teams
Auto-join brings Zocks into meetings with a link. Open the meeting from Live Meetings and click View for prep, agenda, notepad and Ask Anything in one place.

In-person — Desktop or mobile
On Upcoming, use Meeting Tools, then Start Live Meeting. On your phone, tap Quick meeting and allow microphone access.

Phone — Calls
Use Change to Phone on Upcoming, Live or Meeting Prep, then call Zocks or add it to an ongoing call.

You're on track when

By day 14, check each item off:

- [ ] You reviewed the Meeting Prep brief before a client meeting
- [ ] Live Agenda tracked that meeting
- [ ] You tried Ask Anything at least once
- [ ] The summary, tasks and meeting record reached the CRM

Run one meeting end to end

1. **The night before: Meeting Prep**
   On Upcoming, click Meeting Prep next to the meeting. The brief pulls the household summary, goals, past meetings, open tasks and conversation starters.
   Help Center: Meeting Prep
2. **During: the live meeting**
   Prep, agenda, notepad and Ask Anything sit in one view, so you never leave the conversation to look something up.
   Help Center: Live meetings | Mobile app
3. **During: Live Agenda**
   Use a meeting type with Agenda Tracking turned on. Items check off as you cover them, and anything missed becomes a follow-up task.
   Help Center: Agenda Tracking
4. **After: review and push**
   Review the summary and tasks, then push to your CRM. Week 3 goes deeper on this step.
   Help Center: CRM guides

TIP **Add meeting contacts to Zocks and link them to their CRM records for the most complete prep.**

Ask Anything tips

Ask Anything answers from Zocks data plus your connected integrations. Examples:

- Before a meeting: open the contact and ask what has changed since you last met.
- Unplanned touch: a client walks in, emails or calls. Ask Anything catches the team up before anyone responds.
- During a meeting: pull up client context without breaking the conversation.
- Click View on an answer to see the meeting it came from.

Help Center: Meeting Prep

Good habits

- If a client declines, use Remove AI assistant.
- If you change the meeting type, rerun Meeting Prep.
- Participants who never speak will not appear in the summary.

Zocks transcribes. It never records.
Clients don't want sensitive financial conversations recorded, and neither do compliance teams. Zocks captures the conversation without recording audio or video.

→ **Next week: after the meeting, every meeting. Summary review, tasks, CRM push and the follow-up email.**

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

LPL VIP PROGRAM | WEEK 3 | NOV 10

After the Meeting, Every Meeting

Every commitment captured, assigned and in the CRM, without waiting on the advisor.

Why Week 3 matters

The minutes after a meeting decide whether clients get the follow-through you promised. This week turns review, tasks, CRM push and the follow-up email into a routine that ops can run without chasing the advisor.

Built for advisors and the Follow-Through owner you named in Week 1. Ops should attend this week.

Advisor and ops this week

Advisor
Approve the summary and send the follow-up email the same day.

Ops
Work the tasks and push the meeting record to the CRM the same day.

Who does what after the meeting

Write in your team, then keep it the same for every meeting:

Review the results	Advisor or ops
Name	
Work the tasks	Follow-Through owner
Name	
Push to the CRM	Advisor or ops
Name	
Send the follow-up email	Advisor
Name	

You're on track when

By day 21, check each item off:

- [ ] Results are reviewed within a day of each meeting
- [ ] Tasks and the meeting record reach the CRM
- [ ] Follow-up emails go out the same day
- [ ] Advisor and ops agree on the daily routine

The post-meeting routine

1 Review the results

When a meeting ends, Zocks opens the past meeting. Review the presets on Meeting Details. Highlight any result and click Explain to see where it came from.

Help Center: Review results and tasks

2 Work the tasks

Edit tasks with the pencil icon, mark them complete, or send them to your CRM in one click.

3 Push to the CRM

Push the meeting record and tasks so the client record is current for the whole team.

Help Center: CRM guides

4 Send the follow-up

Zocks drafts a follow-up email with action items for the client and the advisor. Edit it in the past meeting, then send.

Help Center: Follow-up email

TIP **You can still edit any follow-up email in the past meeting before you send it.**

Daily best practices

- Morning: check Upcoming and confirm auto-join for the day.
- Before each meeting: review the Meeting Prep brief.
- Same day: review, push to the CRM and send the follow-up.
- End of day: clear open tasks or send them to the CRM.

Make the follow-up email yours

- Setup, Meeting Types: duplicate the Follow-Up Email template to match your voice.
- Keep bracketed placeholders like [Recipient's Name]. Zocks fills them in.

Help Center: Follow-up email

Push within 14 days
Transcripts are kept for 14 days. A same-day push keeps every meeting safely in your CRM.

→ **Next week: connect your planning tools and confirm your team roles.**

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

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LPL VIP PROGRAM | WEEK 4 | NOV 17

Planning Tools, Roles and 30-Day Check

Plan, tax and estate data in every brief, and plans that keep up with every conversation.

Why Week 4 matters

Connect the planning tools you already use, and Zocks brings plan, tax and estate data into Meeting Prep, then suggests plan updates from each meeting for your review. This week also confirms who owns each step, now that your team has run real meetings.

Built for advisors and the Planning Updates owner, often ops.

Advisor and ops this week

Advisor
Connect your planning tools and confirm every role.

Ops
As the Planning Updates owner, review and approve suggested plan updates.

Confirm and expand your roles

Confirm the owners from Week 1, then name the new ones:

Meeting Prep — Confirm
Name

Follow-Through — Confirm
Name

Planning Updates — New
Reviews Zocks' suggested plan updates and approves what gets saved.
Name

Forms and Hand-Offs — New
Owns form-based hand-offs (Weeks 5 and 7).
Name

Your 30-day self-check

Check each item off by day 30:

- [ ] Core 3 connected
- [ ] One meeting pushed to the CRM
- [ ] A planning tool connected
- [ ] One plan update saved from a meeting
- [ ] Roles confirmed

Connect the planning tools you use

1. **eMoney (WealthVision)**
   Settings, Integrations, Financial Planning, Connect next to eMoney. WealthVision is LPL's version of eMoney, so use the eMoney option.
   Help Center: eMoney guide
2. **RightCapital**
   Same path, Connect next to RightCapital. Syncs reviewed meeting details to 200+ fields and creates contacts for new prospects.
   Help Center: RightCapital guide
3. **Holistiplan**
   Settings, Integrations, Tax Planning. Brings tax return data and analysis into Meeting Prep and Ask Anything.
   Help Center: Holistiplan guide
4. **Wealth.com**
   Settings, Integrations, Estate Planning, then turn on Contact Synchronization. Brings estate plan status and documents on file into prep.
   Help Center: Wealth.com guide

TIP **Connect what you use. Most practices need one financial planning tool, plus tax and estate as applicable.**

Plan, tax and estate in every brief

- eMoney: default Meeting Prep templates already include financial planning data. Custom templates need a planning section.
- Holistiplan: ask tax questions mid-meeting through Ask Anything.
- Wealth.com: estate data feeds Meeting Prep, live meetings and Ask Anything. It doesn't push data back yet.

Review plan updates

- After each meeting, Zocks shows suggested updates beside current values, section by section.
- Only the sections you leave checked are saved.
- Sign in to eMoney through SSO? Log in to eMoney first, then click Connect.

Wealth.com needs one more step
Add an estate planning section to your Meeting Prep template. Default templates don't include one. Week 6 covers templates.

→ **Next week: how meeting types, prep, templates and forms fit together.**

LPL VIP PROGRAM | WEEK 5 | NOV 24

Meeting Types, Prep, Templates and Forms

One map of how Zocks shapes every meeting, from the brief to the CRM.

Why Week 5 matters

Tier 2 starts here. A meeting type decides which prep, summary and follow-up templates a meeting gets, and which forms fill from it. Get the map right, and advisors walk in ready while ops receives structured data to act on.

Holiday week: office hours run early in the week, in two time slots, and are recorded.

Advisor and ops this week

Advisor
Pick your most common meeting for Week 6 and review a full brief.

Ops
Check which summary fields reach the CRM, and try F450 on an eligible meeting.

Why Meeting Prep matters

Every brief gives you, in one place:

- Household summary and financial goals
- Conversation starters from past discussions
- Past meetings and open tasks for advisor and client
- A proposed agenda

Clients feel known when you pick up where you left off. Planning data appears when your template asks for it.

You're on track when

By the end of the week:

- [ ] You watched the session, live or recorded
- [ ] You picked your most common meeting for Week 6
- [ ] Advisor and ops reviewed what lands in the CRM
- [ ] You completed F450 from an eligible meeting

How it fits together

1. **Meeting types**
   Setup, Meeting types. System types include Discovery Meeting, Client Review and Plan Proposal, or create your own.
   Help Center: Meeting types and templates
2. **Prep and summary templates**
   Each meeting type has its own templates. The summary shapes what lands in the CRM, which is what ops works from.
3. **Forms**
   Add a form to a meeting type and it fills after the meeting. Find it under Past Meetings, View Meeting, Form tab.
   Help Center: Fill in forms
4. **F450**
   F450 is already in every LPL advisor account. Use it as your first form from an eligible meeting.

TIP **Use consistent calendar titles, for example "Client Review", so Zocks suggests the right meeting type.**

What's inside a meeting type

- Presets: the data Zocks captures from the meeting.
- Templates: one per meeting type for prep, summary and follow-up.
- Agenda Tracking: turn it on per meeting type for Live Agenda.
- Forms: attach the forms that should fill after the meeting.

Help Center: Meeting types and templates | Agenda Tracking

Missed the session?

- Watch the recording before Week 6.
- Week 6 opens with a 5-minute recap.
- Questions over the holiday: support@zocks.io.

Before Week 6
Pick your most common client meeting. You'll build its template next week.

→ **Next week: Templates deep dive. Build the template for your most common meeting.**

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

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LPL VIP PROGRAM | WEEK 6 | DEC 1

Templates Deep Dive

Summaries that come out the way your practice already works.

Why Week 6 matters

System templates work out of the box. Custom templates make every brief, summary and follow-up match how your practice runs, so advisors and ops edit less before pushing to the CRM.

Built for advisors and ops. Bring your most common meeting type.

Advisor and ops this week

Customize one process first, based on your highest priority:

Pick your priority
Is it a different Meeting Prep or agenda? Or a different format for notes from a specific meeting? Choose the one change that would help most.

Build it out
Customize that one template, assign it to its meeting type and run it on your next meeting.

Name a template owner Best practice
One person in your office builds templates and shares them with the team.

Name _____

Missed last week?

Week 5 in 30 seconds:

- A meeting type picks its prep, summary and follow-up templates.
- Forms fill from meeting types.
- F450 is ready in your account.

Watch the Week 5 recording, then start here.

You're on track when

By the end of the week:

- [ ] You built a template for your most common meeting
- [ ] It is assigned to that meeting type
- [ ] You ran one meeting with it
- [ ] Wealth.com users added an estate planning section

Build your first template

1 **Duplicate**
Setup, Templates. Duplicate a system or team template to create your own.
Help Center: Meeting types and templates

2 **Edit**
Use the AI Template Assistant for new templates or big changes. Edit manually for small tweaks.

3 **Assign**
Setup, Meeting types, select the type, gear icon, then scroll to Templates.

4 **Test**
Run your next meeting of that type and review the summary with ops.

TIP **Start with one meeting. Reviews, discovery and service calls can follow.**

Good places to start

Duplicate a system meeting type you already run: Client Review, Discovery Meeting, General Client Check-In or Plan Proposal.

What you can customize

- Meeting Prep template and Meeting Prep email
- Meeting summary and follow-up email
- Agenda templates (account, team or user level)

Help Center: Meeting Prep | Agenda Tracking

Best practices

- Admins and owners can assign templates to users or groups with Assign to users.
- Your Choice overrides the account default for your own meetings.
- Keep calendar titles consistent so Zocks picks the right meeting type.

Help Center: Meeting types and templates

10-minute exercise
Build one template for your most common meeting and run it once before Week 7.

→ **Next week: Forms deep dive with Form Fill.**

Questions? Email support@zocks.io.

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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.**

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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.

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.**

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LPL VIP PROGRAM | WEEK 10 | DEC 29

Tier 2 Self-Audit and Catch-Up

See where you stand before January, on your own time.

Why Week 10 matters

The self-audit shows what is working and what is not after Weeks 5 to 8. Your answers shape the January clinic, so live sessions target real gaps instead of repeating everything.

Async week: no office hours. Complete the self-audit by Jan 4.

Advisor and ops this week

Advisor
Complete the self-audit with your ops partner.

Ops
Bring the ops view: what reaches the CRM, and what still gets typed twice.

Need help over the break?

- Email support@zocks.io any time.
- Every recording stays available on demand.

Tier 2 self-audit

Check what is true for your practice today:

- [ ] A custom template is in use
- [ ] F450 has been completed from a meeting
- [ ] A form beyond F450 is in use
- [ ] Plan updates are saved weekly
- [ ] Meetings are pushed to the CRM the same day
- [ ] Roles are still accurate

You're on track when

By Jan 4:

- [ ] Your self-audit is complete
- [ ] Missed sessions are watched
- [ ] Week 6 exercise is finished

Your catch-up kit

1. **Week 5 recording**
   Meeting types, prep, templates and forms overview.
   Help Center: Meeting types and templates
2. **Week 6 recording and exercise**
   Build one template for your most common meeting.
3. **Week 7 recording**
   Forms deep dive with Form Fill.
   Help Center: Fill in forms
4. **Week 8 recording**
   Process walkthroughs, the post-meeting routine in one pass.

TIP **Do the self-audit with your ops partner. It takes both views to see the gaps.**

Steps teams most often skip

- In-person meetings added under Only Display on Upcoming.
- A follow-up email template duplicated for your most common meeting type.
- Wealth.com estate section added to Meeting Prep templates.
- New templates assigned to a meeting type, not just saved.

How to use your results

- Anything unchecked becomes your January focus.
- Bring your top gap to the Week 12 clinic.

Coming in January

- Jan 5: Insights and coaching, live.
- Jan 12: Team adoption clinic and graduation, live.

Not available at LPL yet
Phone meetings are not yet approved by LPL. Use Zocks for virtual and in-person meetings for now.

Your answers matter
Self-audit results shape the Week 12 clinic.

→ **Next week (live, Jan 5): Insights and coaching.**

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LPL VIP PROGRAM | WEEK 11 | JAN 5

Insights and Coaching

See what's working across every conversation, and coach to it.

Why Week 11 matters

Tier 3 starts with seeing the whole team, not one meeting at a time. Scorecards, coaching insights and the Analytics Hub show trends across meetings, so advisors and team leads improve together.

Welcome back. Built for advisors, team leads and owners.

Advisor and ops this week

Advisor
Review your own score and areas to improve.

Ops
Check that every team member is active, and join the coaching review with your team lead.

Who sees what

Advisors
Their own score, history and areas to improve, under Profile, Meeting Score.

Admins
Regular users' coaching data, plus Analytics Hub dashboards.

Owners
Everyone's coaching data and all Analytics Hub dashboards.

Help Center: Roles and user groups

You're on track when

By the end of the week:

- [ ] You opened the Scorecard tab on a recent meeting
- [ ] You checked your areas to improve
- [ ] A team lead reviewed Insights, Coaching
- [ ] Every team member was active this week

Three views to know

1 **Meeting Scorecards**
Each meeting scores 0 to 100 across scheduling, engagement and workflow. See it on Past Meetings or the Scorecard tab.
Help Center: Meeting Scorecards

2 **Coaching Insights**
Insights, Coaching shows each average against a benchmark of 70, plus areas to improve with a Try this tip.
Help Center: Coaching Insights

3 **Analytics Hub**
Practice, advisor and client trends from your meetings, in the left-hand menu for owners and admins.
Help Center: Analytics Hub

TIP **Let Zocks join every client meeting, including phone and in-person. The dashboards depend on processed meetings.**

Scorecard basics

- Scheduling: time allocation and follow-up bookings.
- Engagement: talk time, sentiment and conversation balance.
- Workflow: agenda use, next steps, tasks and life events.
- A yellow Needs Work tag marks the metrics to focus on.

Help Center: Meeting Scorecards

Analytics Hub tips

- Use the date filter on the left for built-in or custom ranges.
- Export most list charts as CSV from the three-dot menu.

Coaching best practices

- Start with people below the benchmark.
- Watch the trend column for people who are slipping.
- Use the Try this suggestions in coaching conversations.
- Turn on sentiment so engagement scores include client sentiment.

Not available at LPL yet
Client Queries. Subject to LPL approval.

→ **Next week: team adoption clinic and graduation.**

Questions? Email support@zocks.io.

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

LPL VIP PROGRAM | WEEK 12 | JAN 12

Team Adoption Clinic and Graduation

Close the last gaps, bring the whole team on, and keep it running.

Why Week 12 matters

The clinic targets the gaps your self-audits surfaced. Then we celebrate what your team built. Graduation means the process keeps running without office hours, with your Account Manager as your ongoing partner.

Built for advisors, ops and team leads.

Advisor and ops this week

Advisor
Complete your graduation check and review your results recap.

Ops
Invite any remaining team members and keep the weekly routine going.

Your graduation check

Check what is true for your practice:

- [ ] Core 3 connected
- [ ] Meetings pushed to the CRM every week
- [ ] Planning tool connected and plan updates saved
- [ ] A custom template in use
- [ ] A form beyond F450 in use
- [ ] Roles confirmed
- [ ] Every team member active
- [ ] Insights reviewed

You're done when

By the end of the week:

- [ ] Your graduation check is complete
- [ ] You reviewed your results recap
- [ ] You shared program feedback
- [ ] Next steps are confirmed with your Account Manager

Clinic and graduation agenda

1. **Close the gaps**
   Targeted fixes for the most common self-audit gaps across the cohort.
2. **Bring every team member on**
   Invite from the Team page. Advisor seats for those who run meetings, Admin Assistant seats for those who support them.
   Help Center: Team invites
3. **Your results recap**
   A personal recap of what your practice built during the program.
4. **What comes next**
   Continue on Zocks with your assigned Account Manager.

TIP **Have a story to share? Tell your Account Manager. We are collecting testimonials and case studies from VIP advisors.**

After graduation

- Weekly office hours end.
- Your Account Manager is your ongoing partner.
- Support stays at support@zocks.io.

Keep it running

A suggested rhythm after graduation:

- Weekly: advisor and ops check the post-meeting routine.
- Monthly: team lead reviews Coaching Insights.
- Quarterly: review templates and forms against how you work.

Thank you for being a VIP
Questions after graduation go to support@zocks.io or your Account Manager.

→ **What comes next: keep the rhythm going with your Account Manager.**

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