

RTU 2018 Strategy Agenda (Advisors)



7:45-8:30am Class Check In / Continental Breakfast

8:30-8:45am Welcome to RTU!

8:45-9:00am Break/Split into Classes

9:00-9:30am Intro: Old School vs. New School

Physical tool vs. CRM Tool – Why is this important?
Interactive Class Roll Call

9:30-10:30am Course 1: Good Data 101 – Part 1

Topic 1: The Foundation

Navigation/Manage your account/ Action Icons
Internet/CRM Tips and Tricks

Topic 2: Clean up

Duplicates
Completing Past Due Activities
Is Empty Search / Is NOT Empty

Topic 3: Family vs. Membership

10:30-10:45am BREAK

10:45-12:00pm Course 1 Cont'd: Good Data with Style Sheet 101- Part 2

Topic 4: Consistency

Style Sheet Template

Topic 5: Consistent Notes/Activities

Notes
Activities

12:00-1:15pm LUNCH

1:15-2:45pm Course 2: Workflows/Automations 201

Why Workflows are helpful
Examples of Workflows & Automations
Whiteboarding / Conceptualizing
Running Workflows & Automations

2:45-3:00pm BREAK

3:00-4:30pm Course 3: Topical, User-Driven Discussion 301

Classes will pick from a series of Industry topics to go over together, learning best practices, whiteboarding concepts, and being given actionable items. Topics may include:

- How to handle Client Reviews
- How to Prospect using Opportunities
- How to prepare for Client Events using Seminars
- How to handle RMD
- How to handle a death of a client
- How to handle cancelled appointments
- How to handle employee departure
- How to prepare for DOL with Redtail
- How to prepare for the Wealth Transfer
- How to reward loyalty and relate clients
- Additional Services Redtail can provide

4:30-5:00pm Commencement/Departure – Open Q&A