

# RTU 2018 Implementation Agenda (Staff)



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

8:30-8:45 Welcome to RTU!

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

## 9:00-9:30am Intro: Learning About Your CRM before you Learn About Your CRM

Get to know the most used and most efficient areas of your CRM before we deep dive into specific topics

## 9:30-10:30am Course 1: Good Data 101

(Keeping Redtail Clean!)

- Database Lists

- Status & Category

- Keyword, UDF, Source

- Contact Record Layout & Layers

  - Accounts

  - Permissions

  - Know Your Client

- Adding To Contact Records

- Searching for Cleanup

- Bulk Actions

- Reporting for Cleanup

10:30-10:45am Break

## 10:45-12:00pm Course 2: History 201

(Notes, Activities, Reminders!)

- Note Taking

- Activities

- Calendar

- Today Page

- Reminders

- Reporting

12:00-1:15pm Lunch

## 1:15-2:45pm Course 3: Process Management 301

(Workflows & Automations)

- Workflow Whiteboarding

- Workflow Building

- Automations

- Workflow Execution

2:45-3:00pm Break

## 3:00-4:30pm Course 4: Communication 401

(Searching, Seminars, Mail Merge, Opportunities)

- Searching for Segmentation

- Seminar Management

- Mail Merge/Broadcast Email

- Opportunities

4:30-5:00pm Questions/Commencement