RTUXL 2018 Strategy Agenda (Advisors)

REDTAIL EST. 2003 UNIVERSITY

Day 1 (12:00pm–4:00pm)

12:00–12:45pm	Class Check-in
12:45–1:00pm	Welcome to RTU!
1:00–1:15pm	Break / Split into Classes
1:15-1:30pm	**Intro: Old School vs. New School** Physical tool vs. CRM Tool – Why is this important? Interactive Class Roll Call
1:30-2:45pm	**Course 1: Good Data – 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 Customer Export Relatable Integrations Topic 3: Family vs. Membership
2:45–3:00pm	**BREAK**
3:00–4:00pm	**Course 1 Cont'd: Good Data with Style Sheet – Part 2** Topic 1: Consistency Provide Style Sheet Template Database Lists Topic 2: Consistent Notes/Activities Notes Activities

Day 2 (8:00am – 3:30pm)

8:00–8:30am	**Intro: What did you remember?** Wake Up Discussion
8:30–10:00am	**Course 2: Workflows/Automations** Why Workflows are helpful Examples of Workflows & Automations Whiteboarding / Conceptualizing Workflows & Automations
10:00–10:15am	**BREAK**
10:15–11:30am	**Course 2: Continued…** Using Completed Workflows & Automations
11:30–12:30pm	**LUNCH**
12:30–2:00pm	**Course 3: Topical, User-Driven Discussion** 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 work with 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
2:00–2:15pm	**BREAK**
2:15–3:30pm	**Course 3: Continued…**
3:30pm	**Questions / Commencement**