

RTUXL 2018 Implementation Agenda (Staff)



DAY 1

12:00–12:45pm

Class Check-in

12:45–1:00pm

Welcome to RTU!

1:00–1:15pm

Break / Split into Classes

1:15–1:45pm

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.

1:45-2:30pm

Course 1: Good Data 101 (Keeping Redtail Clean!)

Database Lists

Adding To Contact Records

Status & Category

Searching for Cleanup

Keyword, UDF, Source

Bulk Actions

Contact Record Layout & Layers

Reporting for Cleanup

Accounts

Permissions

Know Your Client

2:30-2:45pm

Break

2:45-4:00pm

Course 1 Continued

Contact Record Tips

Searching for Cleanup

Bulk Actions

Reporting for Cleanup

DAY 2

8:00-9:30am **Course 2: History 201 (Notes, Activities, Reminders!)**

Note Taking

Today Page

Activities

Reminders

Calendar

Reporting

9:30-9:45am

Break

9:45-11:30am

Course 3: Process Management 301 (Workflows & Automations)

Workflow Whiteboarding

Workflow Building

Automations

Workflow Execution

11:30-12:30pm

Lunch

12:30-2:15pm

Course 4: Communication 401 (Searching, Seminars, Mail Merge, Opportunities)

Searching for Segmentation

Seminar Management

2:15-2:30pm

Break

2:30-3:30pm

Course 4 Continued

Mail Merge/Broadcast Email

Opportunities

3:30pm

Questions/Commencement