

RTU MASTERS VIP Agenda

RTU Masters is an exclusive, VIP training course that covers advanced CRM user knowledge and will *not* be focusing on basic concepts. Please make sure you are proficient in all **Intended Topic Features** before requesting a spot!



Day 1: Welcome to Redtail! / Orientation

1:00–2:00 Arrival, Registration, and Tours of the HQ

2:00–2:30 Welcome to RTU Masters

2:30–2:45 State of the 'Tail with CEO Brian McLaughlin

2:45–3:30 **Course 1 - Audit & Compliance** We will be presenting case studies on how offices have used their CRM in preparation and execution of an audit. **Intended Topic Features:** Notes, Activities, Reporting, Imaging, Workflows

3:30–3:45 Break

3:45–4:30 **Course 1 - Audit & Compliance** continued...

4:30–6:30 Cocktail Hour & BBQ

Day 2: RTU Masters

7:30–8:00 Breakfast and Registration

8:00–8:15 Welcome (Again!)

8:15–10:15 **Course 2: Business Development / Prospecting** We will be presenting case studies on offices practices for prospecting new clients and the systems they put in place. **Intended Topic Features:** Opportunities, Workflows, Reporting

10:15–10:30 Break

10:30–12:15 **Breakout Courses: Retention CASE Breakouts** After splitting into user groups, trainers will be rotating from group to group, reviewing common day-to-day activities in the CRM that involve tracking your client's information. **Intended Topic Features:** Client Reviews, Database Lists, Searching, Reporting, Seminars

12:15–1:30 Lunch

1:30–3:00 **Breakout Courses: Retention CASE Breakouts** continued... After splitting into user groups, trainers will be rotating from group to group, reviewing common day-to-day activities in the CRM that involve tracking your client's information. **Intended Topic Features:** Client Reviews, Database Lists, Searching, Reporting, Seminars

3:00–3:15 Break

3:15–4:00 **Department Panel Roundtable / Q&A** Hosted by Ricky Redtail

4:00–4:30 Open Forum/Commencement/Farewell