RTU 2020 AGENDA: IMPLEMENTATION
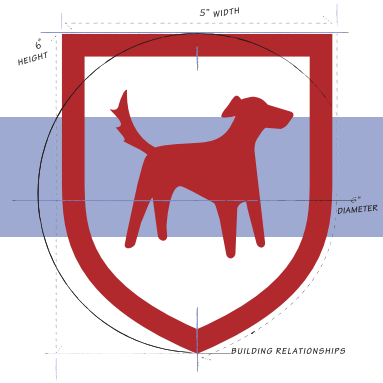
7:15 – 8:00am	Check In/Continental Breakfast
8:00 – 8:15am	WELCOME
8:15 – 8:30am	Break/Classrooms Split

8:30 – 8:45am — Intro to Implementation

8:45 – 10:15am — History Improvement (History Part 1)
Database Lists
Notes
Activities
Reminders
Reporting on History

10:15-10:30am	Break

10:30 – 12:00pm — Workflows (History Part 2)
Building Workflows
Automations
Running Workflows

12:00-1:15pm	LUNCH with Partners/State of the 'Tail

1:15 – 2:45pm — Love it and List It (Information Part 1)
Database Lists
The Contact Record
Contact Layers
Accounts
Relationships

2:45-3:00pm	Break

3:00 – 3:45pm — Tidying Up with Katherine and Curtis (Information Part 2)
Searching for Clean Up
Duplicates
Missing Items
Reporting/Custom Exporting

3:45 – 4:30pm — Open House – (Information Part 2 Continued)
Seminars
Broadcast Emails
Mail Merge
Opportunities

4:30 – 5:00pm	RTU Wrap-up/Questions