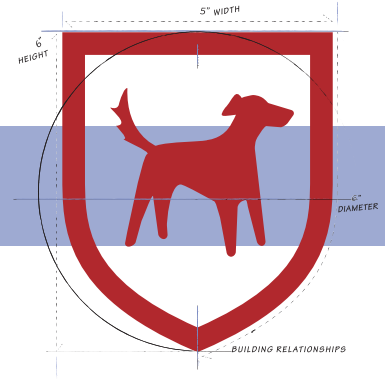


RTU 2020 AGENDA: STRATEGY



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 Strategy*

8:45 - 10:15am *Blueprints - Business Processes in Redtail*
What is a Workflow?
Parts of a Workflow
Whiteboarding Workflows DIY (Group)
Automations

10:15 - 10:30am *Break*

10:30 - 12:00pm *Project Scope - Contact Record in Detail*
How to Handle Client Onboarding
Contact Record
Relationships
How to Handle Wealth Transfer

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

1:15 - 2:45pm *Breaking Ground - Tracking Daily Contact Interactions*
Notes
Activities
Reports
How to Handle Cancelled Appointments
Quality Control - Consistent Data and Data Clean Up
Database Lists
Style Guide
How to Handle Contact Cleanup

2:45 - 3:00pm *Break*

3:00 - 4:30pm *DIY Group Discussion (Not all topics will be covered)*
How to Handle Client Death
How to Handle Client Departure
How to Handle Client Events
How to Handle Client Loyalty
How to Handle Client Reviews
How to Handle Employee Departure
How to Handle Multiple Rep Codes
How to Handle New Employee(s)
How to Handle Prospecting
How to Handle RMDs
How to Handle Scheduling Appointments

4:30 - 5:00pm *RTU Wrap-up/ Questions*