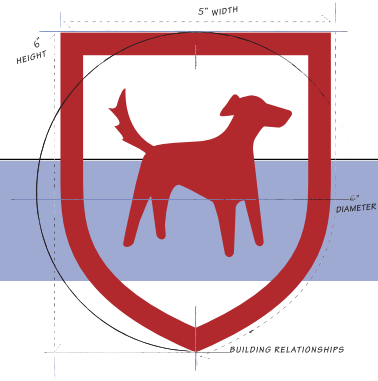


# RTU 2020 XL: STRATEGY AGENDA



## DAY 1

12:00-12:45pm	Check In!
12:45-1:00pm	WELCOME
1:00-1:15pm	Break/Classrooms Split
1:15-1:30pm	<b>Intro to Strategy</b>
1:30-2:30pm	<b>Quality Control – Consistent Data and Data Clean Up</b> Database Lists Style Guide Personal Profile Form How to Handle Contact Cleanup
2:30-2:45pm	Break
2:45-4:00pm	<b>DIY Group Discussion (Not all topics will be covered)</b> How to Handle Contact Events 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

## DAY 2

7:15-8:00am	Continental Breakfast/Rejoin Classrooms
8:00-9:30am	<b>Blueprints – Business Processes in Redtail</b> What is a Workflow? Parts of a Workflow Whiteboarding Workflows DIY (Group) Automations
9:30-9:45am	Break
9:45-10:30am	<b>Project Scope – Contact Record in Detail</b> How to Handle Client Onboarding Contact Record Relationships How to Handle Wealth Transfer
11:30-12:30pm	LUNCH with Partners/State of the 'Tail
12:30-2:00pm	<b>Breaking Ground – Tracking Daily Contact Interactions</b> Notes Activities Reports How to Handle Cancelled Appointments
2:00-2:15pm	Break
2:15-3:30pm	<b>DIY Group Discussion (Not all topics will be covered)</b> How to Handle Client Death How to Handle Client Departure How to Handle Client Loyalty How to Handle Client Reviews How to Handle Scheduling Appointments
3:30pm	RTU Wrap-up/ Questions