

RTU 2019 AGENDA: STRATEGY (ADVISORS)



7:45-8:30am **Heroes Check In /Continental Breakfast**
8:30-8:45am **Welcome Heroes!**
8:45-9:00am **Break/Classrooms Split**

9:00-9:15am **Intro to Strategy**

9:15-10:30am **Good Data**
Navigation
Foundation
How to Handle Contact Cleanup
Custom Exports
Relationships
Profile Form

10:30-10:45am **Break**

10:45-12:00pm **Day-to-Day**
Notes
Activities
How to Handle Canceled Appointments
Reporting

12:00-1:15pm **Lunch** with Redtail CEO Brian McLaughlin: *Integration Partners and State of the 'Tail*

1:15-2:45pm **Process Management**
Why Workflows
Workflow Parts
Whiteboarding
How to Handle Client Death
Automations

2:45-3:00pm **Break**

3:00-4:30pm **Topical, User-Driven Discussion**
How to Handle Client Review
How to Handle Prospecting
How to Handle Client Events
How to Handle RMDs
How to Handle Employee Departure
How to Handle the Wealth Transfer
How to Handle Client Loyalty
How to Handle Multiple Rep Codes

4:30-5:00pm **Heroic Send Off / Questions**