

RTU 2019 AGENDA: IMPLEMENTATION (STAFF)



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 Implementation**

9:15-10:30am **History Part 1: Heroic History & Resolute Reporting**

- Customization
- Note Taking
- Activities
- Calendar
- Today Page
- Reminders
- Reporting On History

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

10:45-12:00pm **History Part 2: Wonderful Workflows & Amazing Automations**

- Workflow Whiteboarding
- Workflow Building
- Automations
- Workflow Execution

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

1:15-2:45pm **Information Part 1: Captain Customization & Colossal Contacts**

- Database Lists
- Status vs. Category
- Keywords vs. UDFs
- Contact Record Details
- Accounts
- Permissions
- Know Your Client
- Searching for Clean Up
- Bulk Actions
- Reporting & Exporting for Clean Up

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

3:00-4:30pm **Information Part 2: Superior Searching & Marvelous Marketing**

- Searching for Segmentation
- Seminar Management
- Mail Merge/Broadcast Email
- Opportunities

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