

REDTAIL UNIVERSITY 2022



Strategy Agenda XL

Day 1

12:00 - 12:45pm

Check In

12:45 - 1:00pm

Welcome

1:00 - 1:15pm

Break / Classrooms Split

1:15 - 2:30pm

Session 1: Growing Your Business

How to Handle: Client Events

How to Handle: Client Loyalty

2:30 - 2:45pm

Break

2:45 - 4:00pm

Session 2 - Cultivate Your Calendar

How to Handle: Scheduling Appointments

How to Handle: Calendar Syncing

Day 2

7:15 - 8:00am

Continental Breakfast / Rejoining Classrooms

8:00 - 9:30am

Session 3 - Nurturing Your Business

How to Handle: Client Reviews

How to Handle: RMDs

9:30 - 9:45am

Break

9:45 - 11:30am

Session 4 - Pruning Your Database

Working with a Style Guide

How to Handle: Contact Cleanup

How to Handle: New & Departing Employees

11:30 - 12:30 pm

Lunch

12:30 - 2:00pm

Session 5 - Circle of Life

How to Handle: Client Death

How to Handle: Divorce

2:00 - 2:15pm

Break

2:15 - 3:30pm

Session 6 - Grafting Your Technology

Utilizing Speak, Imaging, and Mobile App

Integration Q&A

3:30 - 4:00pm

Wrap-Up / Q&A