

REDTAIL UNIVERSITY 2022



Strategy Agenda

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 Implementation
8:45 - 10:00am	Session 1 - Growing Your Business How to Handle: Client Events How to Handle: Client Loyalty
10:00 - 10:15am	Break
10:15 - 12:00pm	Session 2 - Nurturing Your Business How to Handle: Client Reviews How to Handle: RMDs
12:00 - 1:15pm	Lunch
1:15 - 2:00pm	Session 3 - Cultivate Your Calendar How to Handle: Scheduling Appointments How to Handle: Calendar Syncing
2:00 - 2:45pm	Session 4 - Pruning Your Database Working with a Style Guide How to Handle: Contact Cleanup
2:45 - 3:00pm	Break
3:00 - 4:30pm	Session 5 - Circle of Life How to Handle: Client Death How to Handle: Divorce
4:30 - 5:00pm	Wrap-up / Q&A