

# RTU MASTERS VIP Agenda

RTU Masters is an exclusive, VIP training course that covers advanced CRM user knowledge and will not be focusing on basic concepts. Please make sure you are proficient in all Intended Topic Features before requesting a spot!



## Day 1: Welcome to Redtail! / Orientation

12:45–2:00 Arrival, Registration, and Tours

2:00–2:45 State of the 'Tail with CEO Brian McLaughlin

2:45–3:30 Developer/Project Manager Roundtable

3:30–4:30 Department Panel Q&A Hosted by Ricky Redtail

4:30–6:30 Cocktail Hour & BBQ

## Day 2: RTU Masters

7:30–8:00 Breakfast and Registration

8:00–8:15 Welcome (Again)

8:15–10:15 Course 1: Audit/Compliance

We will be presenting case studies on how offices have used their CRM in preparation and execution of an audit. *Intended Topic Features:* Notes, Activities, Reporting, Imaging

10:15–10:30 Break

10:30–12:30 Course 2: Prospecting

We will be presenting case studies on offices practices for prospecting new clients and the systems they put in place. *Intended Topic Features:* Opportunities, Workflows, Reporting

12:30–1:30 Lunch

1:30–4:00 Breakout Courses: Retention CASE Breakouts (approximate break: 3:00)

After splitting into user groups, trainers will be rotating from group to group, reviewing common day-to-day activities in the CRM that involve tracking your client's information.

*Intended Topic Features:* Client Reviews, Database Lists, Searching, Reporting, Imaging, Seminars

Communication

Appreciation

Strategy

Events

4:00–4:30 Open Forum/Commencement/Farewell