ALIGN UNIVERSITY

Best of Both Edition – Day One

Implementation

7:00 AM – 8:00 AM	Check In / Continental Breakfast
8:00 AM – 8:15 AM	Welcome
8:15 AM – 8:30 AM	Break / Classrooms Split
8:30 AM – 8:45 AM	Intro to Implementation
8:45 AM – 9:50 AM	**Dear Diary: Writing the Story of Every Client Relationship**

Every relationship has a story, and every interaction is a crucial chapter. As financial professionals, your CRM is the place where these stories unfold. Let's focus on how to weave a rich narrative through detailed Notes and Activities. By capturing the key moments, insights, and decisions in your CRM, you're not just recording transactions — you're crafting a compelling, complete story that enhances trust, improves service, and guides every future conversation.

Key Takeaways:

- Opportunities
- Database Lists
- Notes
- Activities
- Reminders
- Reporting on History

9:50 AM – 10:00 AM	**Break**

10:00 AM – 11:40 AM **Choose Your Own Adventure**

In every story, you get to decide the path ahead. The way you use your CRM is no different. Whether you're navigating routine check–ins or charting a course through complex financial planning, creating and utilizing Workflows allows you to choose the best route to ensure that every interaction leads to a successful and rewarding conclusions.

Key Takeaways:

- Building Workflows
- Automations
- Running Workflows

11:45 AM – 12:30 PM **Expert Panel – Building Happily Ever After: Transforming Experiences Through Strategy and Tech**

Discover how to create “Happily Ever After” moments for your clients by building a strategic tech stack that helps you save time and lessen pain points. You won't want to miss this panel as we bring together industry experts and integration partners to explore practical ways to identify pain points, streamline operations, and deliver unforgettable client experiences. Learn how to turn your clients’ journeys into success stories they’ll be telling for years to come.

12:30 PM – 1:15 PM **Lunch**

1:15 PM – 2:45 PM	**Character Development**

Just like every great story, every client is a unique character with their own story. Your CRM is the place where you can develop and deepen these relationships, turning every interaction into a pivotal moment in their financial story. Think of your CRM as a character development guide, helping you refine and evolve your client's story with every chapter.

Key Takeaways:

- Database Lists Continued
- The Contact Record
- Accounts
- Relationships

2:45 PM – 3:00 PM	**Break**
3:00 PM – 4:30 PM	**The Approach, The Ordeal, The Reward**

Every client's journey is an adventure, and with the right CRM tools, you can help them navigate their path. From the Approach — identifying their unique needs and goals — to the Ordeal — engaging with them through targeted outreach and personalized communication — you'll be there at every turn. Ultimately, you'll lead them to The Reward, helping them achieve their financial goals and celebrating their success along the way. With CRM as your map, you can craft a personalized journey for each client, making their story a true triumph.

Key Takeaways:

- Advanced Search
- Contact List Building
- Seminars
- Broadcast Email

4:30 PM – 4:45 PM	**Wrap–Up / Q&A**
5:00 PM – 6:00 PM	**Cocktail Hour**

Strategy

7:00 AM – 8:00 AM	Check In / Continental Breakfast
8:00 AM – 8:15 AM	Welcome
8:15 AM – 8:30 AM	Break / Classrooms Split
8:30 AM – 9:50 AM	**The Fault in our Data**

Every story starts with great planning and organization. Cleaning up your data will help you tell a great story!

Key Takeaways:

- Working with a Style Guide
- How to Handle: Contact Cleanup

9:50 AM – 10:00 AM	**Break**
10:00 AM – 11:40 AM	**The Call of the Prospects**

The prospects are calling, the CRM can help you keep on track as you are reaching out to prospects and onboarding them.

Key Takeaways:

- How to Handle: Prospecting
- How to Handle: Onboarding

11:45 AM – 12:30 PM

Expert Panel – Building Happily Ever After: Transforming Experiences Through Strategy and Tech

Discover how to create "Happily Ever After" moments for your clients by building a strategic tech stack that helps you save time and lessen pain points. You won't want to miss this panel as we bring together industry experts and integration partners to explore practical ways to identify pain points, streamline operations, and deliver unforgettable client experiences. Learn how to turn your clients' journeys into success stories they'll be telling for years to come.

12:30 PM – 1:15 PM

Lunch

1:15 PM – 2:45 PM

Ready Client One

The clients are ready, are you? Redtail can help keep you on track with all your client processes.

Key Takeaways:

- How to Handle: Client Reviews
- How to Handle: RMDs

3:00 PM – 3:45 PM

20,000 Guests Under the Sea

Whether we have 20 or 20,000 relationships, we should celebrate the people and things that mean the most!

Key Takeaways:

- How to Handle: Client Events
- How to Handle: Client Loyalty

2:45 PM – 3:00 PM	**Break**
3:45 PM – 4:30 PM	**Gone with the Wind**

Every great story eventually has to come to an end, and with the right tools and strategies, you can be a significant source of guidance for those who experience the end of their particular stories.

Key Takeaways:

- How to Handle: Client Death
- How to Handle: Divorce

4:30 PM – 4:45 PM	**Wrap–Up / Q&A**
5:00 PM – 6:00 PM	**Cocktail Hour**

ALIGN UNIVERSITY

Best of Both Edition – Day Two

7:00 AM – 8:00 AM	Check In / Continental Breakfast
8:00 AM – 8:10 AM	Welcome
8:10 AM – 8:15 AM	Break / Classrooms Split

8:15 AM – 9:15 AM

Navigating the Chapters of Orion Connect

Every great story is built on understanding its structure, and Orion Connect is no different. This session will guide you through Orion Connect's key features and tools, helping you confidently move from one chapter to the next.

Key Takeaways:

- Dashboard
- Portfolio View
- Portfolio Audit

9:15 AM – 10:15 AM

The Haunting of Data: Keeping Orion's Secrets Organized

Just as Sherlock Holmes meticulously pieces together clues to solve a mystery, preparing for a client meeting requires carefully assembling and verifying investment reports to ensure they are clean, accurate, and insightful. In this session, we'll explore how to troubleshoot common challenges, analyze data critically, and present information clearly to your clients, ensuring you solve any reporting issues before they arise and present a report that is both compelling and reliable.

Key Takeaways:

- Data Best Practices
- Database Setup
- New Accounts

10:15 AM – 10:30 AM **Break**

10:30 AM – 11:30 AM **The Adventures of Sherlock Holmes: Solving the Case of Accurate Reports**

Just as Sherlock Holmes meticulously pieces together clues to solve a mystery, preparing for a client meeting requires carefully assembling and verifying investment reports to ensure they are clean, accurate, and insightful. In this session, we'll explore how to troubleshoot common challenges, analyze data critically, and present information clearly to your clients, ensuring you solve any reporting issues before they arise and present a report that is both compelling and reliable.

Key Takeaways:

- Data Queries
- Reports
- Performance

11:30 AM – 12:30 PM **Lunch**

12:30 PM – 1:45 PM **Shhh… this is a Library: Quieting the Noise of Billing**

In the library of financial management, the last thing you need is the clatter of complex billing processes. Orion's Billing app helps you shush the chaos, letting you focus on the discovery and delivery of value to your clients. Quiet the noise, streamline your billing, and make room for what matters most—sharing financial knowledge.

Key Takeaways:

- Billing App
- Bill Settings
- Quarter End Dashboard

ALIGN UNIVERSITY

1:45 PM – 3:00 PM

Your Client's Wishes, Granted: The Magic of Orion's Client Portal

Like a fairy godmother granting wishes, Orion helps you effortlessly connect, understand, and deliver exactly what your clients need—making every interaction feel like magic.

Key Takeaways:

- Client Portal
- Orion Planning