



## The Strategy Agenda

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 – 10:00 AM	<b>The Fault in our Data</b>  Every story starts with great planning and organization. Cleaning up your data will help you tell a great story!  <u>Key Takeaways:</u> <ul style="list-style-type: none"><li>○ Working with a Style Guide</li><li>○ How to Handle: Contact Cleanup</li></ul>
10:00 AM – 10:15 AM	<b>Break</b>
10:15 AM – 12:00 PM	<b>The Call of the Prospects</b>  The prospects are calling, the CRM can help you keep on track as you are reaching out to prospects and onboarding them.  <u>Key Takeaways:</u> <ul style="list-style-type: none"><li>○ How to Handle: Prospecting</li><li>○ How to Handle: Onboarding</li></ul>
12:00 PM – 1:15 PM	<b>Lunch</b>



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 – 5:00 PM

## **Wrap-Up / Q&A**