ASCENT 2026 AGENDA

Operations Leaders and Staff

A tailored agenda to help you maximize your conference experience, designed with your unique role and goals in mind.

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From Whiteboard to Workflow: Effective Process Management with Redtail Workflows

In this session, Redtail Training Experts will guide you through the process of whiteboarding and implementing Workflows in Redtail CRM with intention and strategy in mind. You'll discover how to leverage whiteboarding techniques to visually map and refine your Workflow strategy before building it within Redtail. We'll explain how to set a clear Target Date and calculate each Step's due date, so your processes stay on schedule. You'll explore the use of Outcomes to create conditional paths in your Workflow—streamlining the process and allowing for more flexibility. This pre-conference session will help you push past process-building pitfalls to create systems that drive action and create accountability. Throughout the session, we'll walk through identifying critical touchpoints in the client journey and show how to configure those within Redtail Workflows to stay organized and boost operational efficiency.

COO Circle

As one of Orion's most active and engaged communities, the COO Circle is where operational excellence meets collaborative insight. At Ascent 2026, we're thrilled to bring this dynamic group together for a special in-person session — an opportunity to connect face-to-face with peers who are navigating the same challenges and driving innovation behind the scenes.

Join us for a focused discussion on the strategies, systems, and solutions shaping the future of advisory firm operations. Whether you're tackling growth, efficiency, talent, or tech adoption, this session offers a unique forum to share ideas, ask questions, and walk away with practical takeaways.

Don't miss this exclusive opportunity to strengthen your network and help shape the future of the COO Circle.

Simplify the Story: Building Reports That Make Sense of It All

This session is designed for Orion power users who build custom reports that unify financial planning, performance metrics, and holdings data into a single, client-ready narrative. Learn how to harness Orion's reporting tools to transform complex data into confident, actionable insights that resonate with clients.

Workflow Smarter: Customizing and Scaling Redtail for Your Practice

Redtail Workflows are powerful tools that help streamline and standardize processes across your financial practice. You'll learn how to create customized workflows for a variety of needs, from managing client meetings and call cadence routines to coordinating events and annual reviews. We'll explore how different templates for meetings, call cadences, and events can be scaled down or repurposed for other processes, making them highly adaptable. You'll also learn how to automate and trigger these workflows using Redtail Automations, ensuring tasks are launched at the right time with minimal manual effort. With Redtail Workflows, you can build repeatable, scalable systems that enhance client service and operational efficiency.

Input with Intention: Getting Data Into Orion

Discover the right way to bring data into Orion, whether manually, in bulk, or through integration. This session covers best practices to ensure your data is clean, consistent, and ready to support everything else you do on the platform.

Outsourced Ops: Where It Works and Where It Breaks

Many firms are turning to outsourced trading, compliance, marketing, and even client service to stay lean while growing fast. But not every function belongs outside your walls. This panel explores the benefits and risks of outsourcing key operations, how to evaluate partners, and where the model starts to fall apart if not managed properly.

Output with Impact: Putting Your Data to Work

Once your data is in, it's time to make it count. We'll explore how to extract and apply your Orion data through exports, dashboards, reports, and more to drive insight, action, and meaningful outcomes.

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Ascent 2026 is your chance to sharpen your skills, stay ahead of key industry shifts, and connect and learn from your peers. Don't miss this opportunity to expand your knowledge and spur growth for your business.