



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 **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

10:00 AM – 10:15 AM **Break**

10:15 AM – 12:00 PM **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

12:00 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

2:45 PM – 3:00 PM

Break

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

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