Redtail Edition – Day One

The Implement 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 – 8:45 AM	Intro to Implementation
8:45 AM – 10:00 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

10:00 AM – 10:15 AM	**Break**

10:15 AM – 12:00 PM **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

12:00 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 – 5:00 PM	**Wrap–Up / Q&A**
5:00 PM – 6:00 PM	**Cocktail Hour**

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**
5:00 PM – 6:00 PM	**Cocktail Hour**

Redtail 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 – 10:15 AM	**Once Upon a Process: Strategies for Managing and Communicating Change** In this engaging session, we'll explore how to effectively manage and communicate through processes within your organization. Just like a great tale, every process has its own timeline — and through thoughtful storytelling, you can guide yourself through the twists, challenges, and triumphs of the journey. Key Takeaways: ○ Speak ○ Mail Merge ○ Proposal Tool ○ BeFi Tools ○ Imaging ○ Client Portal
10:15 AM – 10:30 AM	**Break**

10:30 AM – 11:30 AM	**Storyboarding Success: Networking and Group Discussion on CRM Strategies** Join us for an interactive breakout session on storyboarding, also known as whiteboarding. This session will teach you how to use whiteboarding techniques and provide tips and best practices for creating more effective workflows. You'll collaborate with peers to map out key touchpoints in the client journey, apply the whiteboarding skills you've learned, and develop your own processes to help illustrate your firm's story.
11:30 AM – 12:30 PM	**Lunch**
12:30 PM – 2:00 PM	**One Chapter at a Time: Leveraging Redtail CRM to Build Relationships and Foster Trust** Every client relationship is a story unfolding, and you're the storyteller. In this session, we'll show you how to transform each interaction into a pivotal moment in the narrative of trust and loyalty.
2:00 PM – 3:00 PM	**The Plot Twist: Live 'Ask a Trainer' Q&A Session** Every CRM user faces moments of uncertainty—those plot twists where the path forward isn't clear. In this live Q&A session, we'll help you navigate those twists by answering your questions and offering expert guidance.