



Best of Both Worlds

Day 1

Choice of either the Implementation Track or Strategy Track

Implementation Agenda

7:00 - 8:00am

Check In / Continental Breakfast

7:20 - 7:45am

Sponsor Education Session: Mobile Assistant

8:00 - 8:15am

Welcome

8:15 - 8:30am

Break / Classrooms Split

8:30 - 8:45am

Intro to Implementation

8:45 - 10:00am

History Part 1 - Maintaining the Captain's Log

Every mission requires a comprehensive log! Learn all the ways to track your interactions with the most important history-focused tools in your CRM.

Key Takeaways:

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

10:00 - 10:15am

Break

10:15am - 12:00pm

History Part 2 - Houston, We Have a Solution

The best way to avoid problems is by having concrete plans in the first place! Help your crew work better together with these process-management solutions!

Key Takeaways:

- *Building Workflows*
- *Automations*
- *Running Workflows*

12:00 - 1:15pm

Lunch

1:15 - 2:45pm

Information Part 1 - Customize Your Constellation

Every client and their relationships are unique! Fortunately, there are many tools in the CRM to help you draw your own Contact Constellations in the sky!

Key Takeaways:

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

2:45 - 3:00pm

Break

3:00 - 4:30pm

Information Part 2 - Establish Your Orbit

The information in your CRM helps you maintain your routines so you can focus on your ever-expanding galaxy. Continue to bring in new opportunities when you harness the power of your gravitational pull.

Key Takeaways:

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

4:30 - 5:00pm

Wrap-up / Q&A

5:00 - 6:00pm

Cocktail Hour

Strategy Agenda

7:00 - 8:00am

Check In / Continental Breakfast

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8:30 - 10:00am

Session 1 - What is your Launch Status?

Every great mission starts with great planning and organization. Is your ship (and your CRM) ready for takeoff?

Key Takeaways:

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

10:00 - 10:15am

Break

10:15am - 12:00pm

Session 2 - Blast Off!

The relationships you have with your clients and a journey to the stars have one thing in common: they all have to start somewhere!

Key Takeaways:

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

12:00 - 1:15pm

Lunch

1:15 - 2:45pm

Session 3 - Life on the Space Station

The life of an astronaut is one of repetition, making sure everything is being maintained properly. So too, is the life of an advisor, making sure every client is getting what they need, regularly.

Key Takeaways:

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

2:45 - 3:00pm

Break

3:00 - 3:45pm

Session 4 - Making Our Space (station) Jam

The cold vastness of space can be a reminder of the special relationships we have in our lives, and why 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 - 4:30pm

Session 5 - To Infinity and Beyond

Every great journey comes 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 journeys.

Key Takeaways:

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

4:30 - 5:00pm

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Cocktail Hour

Day 2

7:15 - 8:00am

Check In/Continental Breakfast

8:00 - 8:15am

Blast Off

8:30 - 9:30am

A Different Kind of Data in Space

No, we're not talking about the android from Star Trek. In this session, we focus on how data flows into Orion and how you can support the mission of keeping it clean and organized by adopting our best practices for database maintenance.

Key Takeaways:

- *Data Best Practices*
- *Database Setup*
- *New Accounts*

9:45 - 10:45am

Space Exploration Isn't Free, After All

You need to spend more time exploring the cosmos and less time thinking about how to pay for it. Lucky for you, Orion's Billing helps you calculate fees, create custom fee and payout schedules, and get paid faster than before!

Key Takeaways:

- *Billing App*
- *Bill Settings*
- *Quarter End Dashboard*

11:00am - 12:00pm

Houston, We're Avoiding Problems

In order to avoid any rough patches in your journey through the stars, you need to be able to not only get performance data quickly and easily, but also be able to effectively communicate that information to your clients in compelling, easy-to-understand ways.

Key Takeaways:

- *Data Queries*
- *Reports*
- *Performance*

12:00 - 1:00pm

Lunch

1:00 - 2:00pm

Navigate Your Financial Galaxy With Ease

Operating your spacecraft requires you to know every button and switch and what it does. Orion's Portfolio Dashboard provides an intuitive, customizable interface for you to navigate through all the financial data of your clients in order to serve them best.

Key Takeaways:

- *Dashboard*
- *Portfolio View*
- *Portfolio Audit*

2:15 - 3:15pm

Ground Control, Do You Read Us?

Communication is a key aspect of space travel, and it's also a key aspect of interacting with your clients. Fortunately, Orion has tools that can help you communicate with your clients that are better than any galactic radio!

Key Takeaways:

- *Client Portal*
- *Financial Planning*

3:30 - 4:00pm

Wrap Up/Q&A