



Planet Redtail

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

7:20 - 7:45am

Sponsor Education Session: Mobile Assistant

8:00 - 8:15am

Welcome

8:15 - 8:30am

Break / Classrooms Split

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 - 2:00pm

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*

2:00 - 2:45pm

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*

2:45 - 3:00pm

Break

3:00 - 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

Wrap-up / Q&A

5:00 - 6:00pm

Cocktail Hour

Day 2

Tracks combine for one agenda

7:15 - 8:00am

Breakfast

8:00 - 8:15am

Blast Off

8:30 - 9:00am

Filing Your Flight Plans

Every space mission relies on past records for guidance. Likewise, it's your duty to document everything related to your clients. We'll equip you with the skills to create a top-notch documentation library in Redtail Imaging!

Key Takeaways:

- *Redtail Imaging*
- *Document Organization*
- *Indexing*
- *Folder Structures*

9:00 - 9:45am

Connecting Across the Universe: Redtail Speak

In today's world, communication happens at the speed of light! We'll show you all the ways Redtail Speak can help you connect more effectively in your galaxy!

Key Takeaways:

- *Client Texting*
- *Internal Chat*
- *Tips & Tricks*

9:45 - 10:00am

Break

10:00 - 10:30am

One Small Step for Man, One Giant Leap for Client Experience

In this enlightening session, we will embark on this celestial voyage with us and learn how the Orion Client Portal, in tandem with Redtail CRM, elevates client engagement to new heights.

Key Takeaways:

- *Client Portal*
- *CoBrowse*
- *Document Sharing*

10:30 - 11:30am

Rocket-Powered Proposals Using Our New Streamlined Tool

When connecting with strange new lifeforms on unexplored planets, sometimes an organized, concise, and understandable proposal helps bridge the communication gap better than any universal communicator.

Key Takeaways:

- *Building Proposals*
- *Orion Tools*
- *BeFi*

11:30am - 12:30pm

Lunch

12:30 - 1:40pm

The Path of Totality: Pathway Workflows for Improved Process Management

We're taking an exhilarating journey through the cosmos of productivity as we delve into the vast expanse of workflow strategies. In this session, we'll unveil the secrets of four distinct workflow types, as well as talk through real life examples and case studies for each one.

Key Takeaways:

- *Workflow Strategies*
- *Process Management*
- *Team Efficiency*

1:40 - 2:00pm

Break

2:00 - 3:00pm

Perfecting Your Launch Schedule

Maintaining a clean, up-to-date calendar is not only important for finding the right time to launch, but also for maintaining schedules for your staff and clients in Redtail. Come learn additional tips and tricks!

Key Takeaways:

- *Calendar Best Practices*
- *Syncing Tools*
- *Calendar Integrations*

3:00 - 3:15pm

Wrap Up/Q&A

1:1 Consultation Appointments will be available throughout the day. Exact times and instructions to schedule will be sent prior to the event.