REDTAIL
UNIVERSITY

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	**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
- 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 successful and rewarding conclusions.

Key Takeaways:

- Building Workflows
- Automations
- Running Workflows

12:00 PM – 1:15 PM	**Lunch**
1:15 PM – 2:45 PM	**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

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**