

RTU 2019 XL AGENDA:
STRATEGY (ADVISORS)



DAY 1=

- 12:00-12:45pm **Heroes Check In**
- 12:45-1:00pm **Welcome Heroes!**
- 1:00-1:15pm **Break/Classrooms Split**
- 1:15-1:30pm **Intro to Strategy**
- 1:30-2:30pm **Good Data**
 - Navigation
 - Foundation
 - How to handle Contact Clean-up
 - Exports
- 2:30-2:45pm **Break**
- 2:45-4:00pm **Day-to-Day**
 - Relationships
 - Notes
 - Activities

DAY 2=

- 7:15-8:00am **Continental Breakfast/Rejoin Classrooms**
- 8:00-9:30am **Day-to-Day *continued***
 - Reporting
 - How to Handle Cancelled Appointments
- 9:30-9:45am **Break**
- 9:45-11:30am **Process Management**
 - Why Workflows?
 - Parts of a Workflow
 - Whiteboarding
 - How to Handle Client Death
 - Automations
- 11:30-12:30pm **Lunch with Redtail CEO Brian McLaughlin: *Integration Partners and State of the 'Tail***
- 12:30-2:00pm **Topical, User-Driven Discussion**
 - How to Handle Prospecting
 - How to Handle Client Events
 - How to Handle RMDs
 - How to Handle Employee Departure
 - How to Handle The Wealth Transfer
 - How to Handle Client Loyalty
 - How to Handle Multiple Rep Codes
- 2:00-2:15pm **Break**
- 2:15-3:30pm **Topical Discussion *continued***
- 3:30pm **Heroic Send Off / Questions**