



REDTAIL UNIVERSITY 2023 XL

Strategy Agenda

Day 1:

12:00 - 12:45pm

Check In

12:45 - 1:00pm

Welcome

1:00 - 1:15pm

Break / Classrooms Split

1:15pm - 2:30pm

Session 1 - Prepping The Kitchen

Working with a Style Guide

How to Handle: Contact Cleanup

2:30 - 2:45pm

Break

2:45 - 4:00pm

How to Handle: Employees

How to Handle: Other Internal Process

Day 2:

7:15 - 8:00am

Continental Breakfast / Rejoin Classrooms

8:00 - 9:30am

Session 2 - Finding Your Foodies

How to Handle: Prospecting

How to Handle: Onboarding

9:30 - 9:45am

Break

9:45 - 11:30am

Session 3 - Following the Recipe

How to Handle: Client Reviews

How to Handle: RMDs

Session 4 - Adding the Secret Ingredient

How to Handle: Client Events

11:30 - 12:30pm

Lunch

12:30 - 2:00pm

Session 4 (pt. 2) -

How to Handle: Client Loyalty

Session 5 - Dividing up Leftovers

How to Handle: Client Death

How to Handle: Divorce

2:00 - 2:15pm

Break

2:15 - 3:30pm

Session 6 - Side Dishes

Utilizing Speak, Imaging, and
Mobile App Integration

3:30 - 4:00pm

Wrap up / Q&A