



**YOUR LEARNING  
YOUR VISION**

**AGENDA: WEDNESDAY, OCTOBER 13, 2021**

Time	Topic	Facilitator
12:30 – 12:45 EDT	Welcome and Kick-off	Bob Sullivan, Pinpoint Global
12:45 – 1:15 EDT	Data Driven Dashboards and Widgets	Tony Hersey and Mike Tringale, Pinpoint Global
1:15 – 1:45 EDT	Redesign & Universal Resource Pages	Chris Harris, Prudential ISG
1:45 – 2:30 EDT	Leadership Skills – Training Content	Dr. Dennis Burke and Dr. Andy Burkemper, Coker University
2:30 – 2:45 EDT	Break	
2:45 – 3:15 EDT	Advanced Filtering and Feedback	Jessica Kerr, Knights of Columbus
3:15 – 3:45 EDT	Financial Planning Roadmap and Survey Driven Curriculum	Elizabeth Gardner, Prudential
3:45 – 4:45 EDT	Tips and Techniques – New Admin Panel, Universal Resources Page Upgrades, Advanced Video Coach Integration	Tony Hersey and Shari Stauble, Pinpoint Global
4:45 – 5:00 EDT	Badges	Mike Tringale, Pinpoint Global