# Practice Management - Introduction Supplementary Session

**What is this session about?**

This session is designed to give you a detailed look at the practice management capabilities of XPLAN.

This is an interactive session where you will observe demonstrations as well as participate in activities that are structured to provide you with an understanding of XPLAN, and how you could use the system to provide advice to your financial planning clients. The session covers the following areas:

**Templates**

- Learn how to create templates of various kinds including email, file note, task and diary.
- Look at how templates can be used to increase efficiencies within the practice.

**Campaigns**

- Learn how to create campaigns, track client responses to invitations and analyse current and past campaigns.

**Invoicing**

- Learn how to create products for use within invoices.
- Learn how to create recurring invoices and how to run various management reports for invoices.

**Service Benchmarks**

- Learn how to create Service benchmarks.

**Who should attend this session?**

- Administration staff
- Office/Practice Managers
- Planners who do their own administration
- Principals who want to know about the CRM capabilities of XPLAN.

**Pre-Requisite**

- Completion of an XPLAN New User session
- Good knowledge of Financial Planning concepts

**Time**

Half Day

**Learning Outcome**

After completing this session, participants will be able to:

- Create email, note, task and diary Templates
- Create Campaigns and track and report on client responses to campaign invites
- Use the Invoicing module to create products and invoices
- Create Service Benchmarks to track and report on service provided to clients

**How do I register for this session?**

Contact your Account Executive or view the XPLAN Training Listing on our website.

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