Practice Management - Advanced Supplementary Session

What is this session about?

This session is aimed at providing participants with knowledge and experience of creating case benchmarks, activating and completing case, using Alerts Manager to identify opportunities, leads to track the opportunities and using action manager to automate activities within XPLAN. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios.

This session provides an in-depth understand how the XPLAN software and Case Threads, Leads, Alerts Manager and Action Manager fits within the advice journey. Enabling participants to effectively build, manage, report and automate business processes whilst also developing structured guidelines to standard process to assist with managing clients, the advice processes and compliance obligations.

The session covers the following main areas:

Cases

- Learn how to setup Case Benchmarks.
- Learn how to add a Case to a Thread template.
- Learn how to add a Case to a Client
- Learn how to complete items of the Case.

Leads

- Learn how to create a Lead
- Learn how to activate a lead against a client in XPLAN
- Learn how to update a Lead
- Learn how to report on Leads

Threads

- Learn how to build a Thread Template for Cases
- Learn how to attach a Case to a Thread.
- Learn how to activate a thread against a client in XPLAN.

Alerts

- Learn about how XPLAN Exception & Compliance Management provides advisers and dealer groups with a mechanism for running automated, exception-based rules across your client database. Compliance rules can be built around client and portfolio data.

Action Manager

- Learn how to add barcodes to your Xmerge documents
- Learn how to setup the actions
- Learn how to execute an Action Manager document

Who should attend this session?

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

Pre-Requisite

- Completion of the XPLAN New User session
- Good knowledge of Microsoft Word and Financial Planning concepts
- Thorough knowledge of XPLAN Threads.

Time

- Half day

Learning Outcome

After completing this session, participants will be able to:

- Create Case benchmarks to establish requirements for a Case.
- Activate and complete a case for a client.

- Use Leads to track and manage business opportunities.
- Use the Alerts Manager to identify opportunities and breaches on both client and portfolio data.
- Create barcoded Action Manager documents to automate activities within XPLAN.

How do I register for this session?

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

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