

# Threads

## Supplementary Session

### What is this session about?

Welcome to the half day Threads session. This session is aimed at providing participants with knowledge and experience of Threads, a series of related tasks used to build your businesses processes within XPLAN. This is achieved through expert knowledge, hands-on application, interactive exercises and real-business processes.

This session provides an in-depth understand how the XPLAN software and Threads 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.

### Who should attend this session?

Practice Managers and XPLAN System Administrators.

### 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 should be able to:

- Understand the role Threads can play within your business
- Build and maintain Threads
- Understand how to utilise the different features of a Thread
- Apply Threads to both an individual and a group of clients
- Run reports with valuable information gained from your Threads

### How do I register for this session?

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