Case Threads
Course description

Xplan 2021

What is this course about?	This course is aimed at providing participants with knowledge and experience of Threads and Cases. This includes building a series of related tasks built around the advice process as well as creating case benchmarks to assist with advice case management. This is achieved through expert knowledge, hands-on application, interactive exercises and real-business processes.
	This course provides an in-depth understand how the Xplan software and Case 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 course?	• Practice Managers / Site Administrators
Pre-Requisite	• Completion of the Xplan New User course. • Good knowledge of Financial Planning concepts.
Time	Half Day

Learning Outcome

After completing this course, you should be able to:

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

How do I register for this course?

Please visit our [website](#) for the Xplan training schedule and registration form.

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