Practice Management - Automation Course description

Xplan 2021

What is this course about?	This course provides an in-depth understand how the Xplan software and Opportunities, Action Manager, Scheduler and Alerts 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?	• Administrators / Practice Managers / Site Administrators • Advisers who do their own administration • Principals who want to know about the more advanced Client Relationship Management (CRM) capabilities of Xplan.
Pre-Requisite	• Completion of an Xplan New User course. • Good knowledge of Financial Planning concepts. • Knowledge of Advanced Search and Templates
Time	Half Day
Learning Outcome	After completing this course, you should be able to: • Use Opportunities to track and manage business opportunities. • Create barcoded Action Manager documents to automate activities within Xplan. • Create a Schedule to automatically activate a review process. • Use Alerts to identify opportunities and breaches on both client and portfolio data.
How do I register for this course?	Please visit our [website]() for the Xplan training schedule and registration form.

Iress Training

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