Practice Management - Communication Course description

Xplan 2021

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What is this course about?	This course is aimed at providing participants with knowledge and experience of Templates, Campaigns and Service Benchmarks. This course provides good grounding in the fundamental management of your practice using features of Xplan, such as creating templates, event tracking and tracking service delivery.
Who should attend this course?	• Administrators / Practice Managers • 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.
Time	Half Day
Learning Outcome	After completing this course, you should be able to: • Create email, note, task and diary Templates • Create Campaigns and track and report on client responses to campaign invites • Create Service Benchmarks to track and report on service provided to clients
How do I register for this course?	Please visit our website for the Xplan training schedule and registration form.

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