



Get to know Xplan

Practical learning. Real confidence.

Introduction

Getting started with new software can feel overwhelming.

You want clarity from day one. Clear guidance. No confusion. No wasted time. That's exactly what we aim to provide. You learn differently today than you did a few years ago. You expect flexibility. On-demand access. Practical examples. Support when you need it. So that's how we've designed Xplan training.

You'll find structured learning in formats that suit you, from self-paced modules to live sessions. And when questions come up, the Iress Community is there to support you with practical advice and real-world insight. You don't have to figure it out alone. We'll guide you through it.

Your starting point: the Iress Learning Centre

Think of the Iress Learning Centre as your central hub for Xplan and CommPay training. It's available on demand, so you can access learning when it suits you. Book sessions. Track progress. Return whenever you need a refresher.

What you'll find inside

The Learning Centre includes hundreds of structured courses and training videos designed to help you use Xplan and CommPay with confidence. Whether you're new to the platform or looking to deepen your expertise, you'll find content organised around real business needs, including:



Practice management



Clients, policies and portfolios



Workflow management



Data feeds



Revenue management

You'll also have access to training guides and a full record of completed and upcoming learning, so you can clearly see your progress.

*Currently available in Australia, New Zealand, the United Kingdom and South Africa.



Training designed around how you work

You can choose the format that suits your schedule, your role and your learning style.



eLearning

Set your own pace with structured eLearning courses. Access them anytime, from anywhere, and revisit them whenever you need.



Micro-learns

Short, focused and practical. Most sessions are under 10 minutes and designed to give you exactly what you need, quickly. With more than 700 available, you can target specific tasks or features with precision.



Learning Pathways

If you're unsure where to begin, Learning Pathways provides a recommended training plan aligned to typical roles within a financial planning business.

You can complete these through eLearning or virtual classroom sessions. Progress tracking helps you stay focused and build confidence step by step.



Virtual classroom

If you value live interaction, our virtual classroom sessions offer structured, hands-on training delivered via Zoom.

You'll be guided by experienced trainers and have the opportunity to ask questions in real-time. Some sessions include pre-learning to ensure you get the most from the experience.

Webinars

Our product and training teams regularly host live webinars on key topics and updates.

Upcoming sessions are listed in the Iress Learning Centre, and previous webinars are available on demand so you can revisit them at any time.



Learning that reflects real life

Our training is built around real-world scenarios. The situations you explore are those you encounter every day, helping you apply what you learn with clarity and confidence.

[Explore the Iress Learning Centre](#)

Start building your knowledge today



Meet the Iress Community

Training builds knowledge. The Iress Community strengthens it.

This is where clients connect with peers and product experts to share insights, ask questions and stay informed.

The Iress Community offers:



**Searchable help articles,
FAQs and software information**



**“Ask Me Anything” sessions
with product experts**



**Service updates
and known issue notifications**



**Case studies and practical
best practice examples**



**Software release
highlights**



**Datafeed information
and platform summaries**

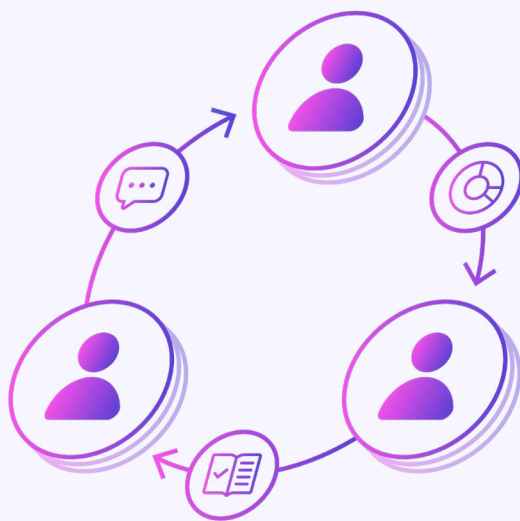


**Opportunities to share feedback through
Community surveys and Iress Labs**

It's a space designed to support collaboration, transparency and continuous improvement.



You're invited



The Iress Community includes more than
Over 23,000 members
worldwide and continues to grow.



Join the
conversation



Learn from peers



Help shape what
we built next

Visit the Iress Community at

community.iress.com

**Let's build the right
training approach for
your business**

If you'd like help creating a tailored training package, we're here to support you.

We can work with you to understand your goals, your team structure and any specific requirements, then recommend the right combination of learning options.

Speak to your Iress representative to start the conversation or visit <https://iress-connect.atlassian.net/servicedesk/customer/portals>