Case Threads
Session description

Xplan June 2020 Major Release

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What is this session about?	This session 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 session 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 session?	• Practice Managers / Site Administrators
Pre-Requisite	• Completion of the Xplan New User session. • Good knowledge of Financial Planning concepts.
Time	Half Day

Learning Outcome	After completing this session, 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 session?	Please visit our website for the Xplan training schedule and registration form.

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