

Let's do this

Get to know Xplan with us



“I love learning new software”

Said no one ever.

We get it. It's like bringing flat-packed furniture home. You just want to open the box, get it all out, put it together and start using it straight away. Ideally, with no missing pieces, minimal swearing and without getting in a sweaty mess over a confusing set of instructions and spilling your tea everywhere.

We also get that the way people learn how to do things isn't like it used to be. You've got YouTube, blogs and Reddit. Why should getting to grips with Xplan be any different?

So we've got training - oodles of it - packaged up in lots of different ways for you to choose from.

And, because we all need a helping hand sometimes (yes, even the pros), the Iress Community has your back, providing help, support and encouragement whenever you need it.

So let's do this together, the easy way.

Shall we show you how it's done?

First up, you've got the Iress Learning Centre

Think of this as your on-demand, indispensable training platform*. Bookmark it because it's your new best friend. It's where you'll go to access and book all your Xplan or CommPay training.

Dip in as often or as little as you like. Easy peasy.

So what's it got?

When it comes to content, Netflix has nothing on us. The Iress Learning Centre is packed with hundreds of courses and training videos to help you get to know and use Xplan and CommPay.

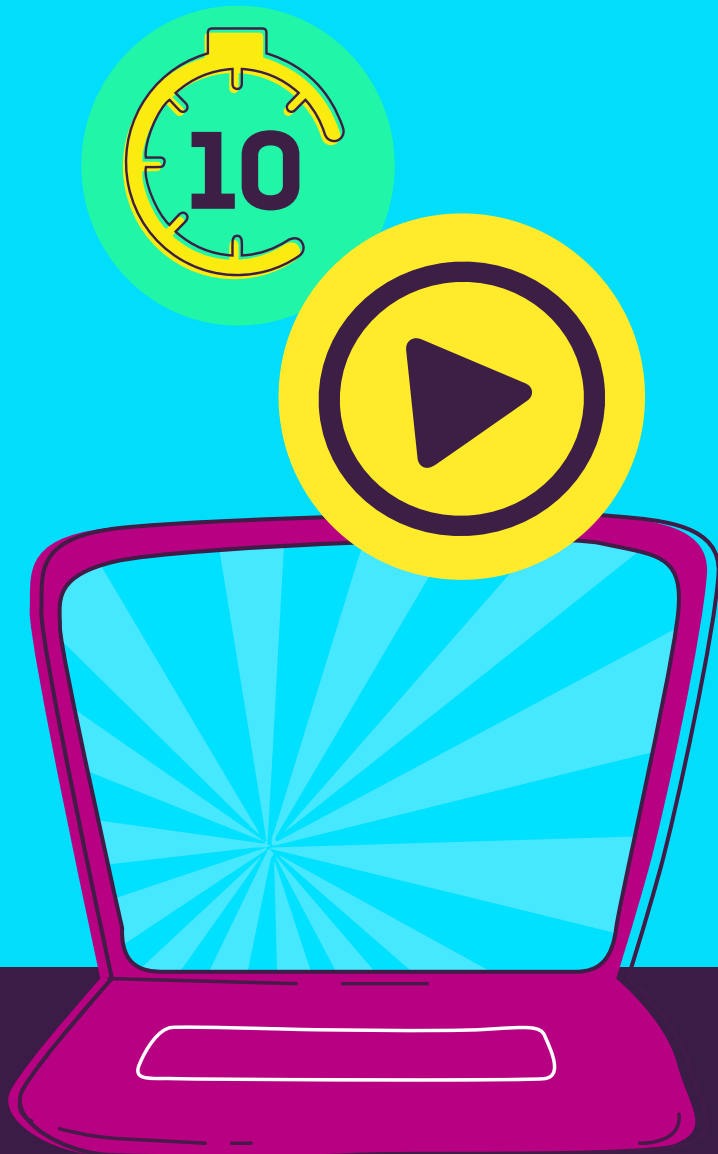
Whether you're a new user or a super user, you'll find everything you need all organised into categories using your kind of lingo - expect heaps

on practice management, clients, policies and portfolios, workflow management, data feeds, revenue management and all that stuff you love.

We've also thrown in training guides and a full history of your completed and future learning so you can see what a boss you've become.

* Currently available in Australia, New Zealand, United Kingdom and South Africa (we're working on the rest).

Here's a bit more about each of our training methods. The choice is yours.



eLearning

Set your own pace with our eLearning courses that you can complete anytime, anywhere. Choose from a wide number of courses that you can take as often as you like.

Learning Pathways

Unsure where to start or where you're headed? No worries. Our Learning Pathways offer a recommended training plan based on typical roles within a financial planning business. Think of it like a box set. You can complete the course at your pace through e-Learning or by joining a virtual classroom session. Progress bars will keep you motivated and on track.

Micro-learns

Like your training quick? These short and sharp on-demand videos are for you. Each session lasts no more than 10 minutes but will tell you exactly what you need to know. Over 700 to choose from.

Virtual classroom

Enjoy the interaction and motivation of classroom training? This option offers that, with the convenience of being hosted via Zoom. You can expect a hands-on experience and the chance to ask questions live and direct with our talented host. Some pre-learning is normally required, and we might give you some homework too.

Webinars

Our brilliant product and training teams occasionally host live webinars on all sorts of topics. You can find details of what's coming up in the Iress Learning Centre, and all of our past webinars are available to watch on-demand too.

We like your style

In case you're wondering, we use real-life scenarios in our training, just like those you'd come up against every day. We find it's the best way to help you learn the ropes.



Get stuck in

[Explore the Iress Learning Centre](#)

Now meet the Iress Community

If the thought of the Iress Community conjures up images of people geeking out on Xplan, you'd be right.

But wait. It's also so much more than that.

While the Iress Learning Centre provides the training, the Iress Community is its partner in crime, providing help from your peers (and us), along with the latest need-to-know software announcements and updates.

It's where you'll meet fellow Xplan users and where fascinating conversations and deep-dive discussions happen. Members are positively encouraged to

share their knowledge by helping out other users with any queries (what better chance to put all that Iress Learning Centre training to good use).

It's also the place where you can share feedback and ideas with us. Our Community team will always listen and respond. Though if you have any major issues or complaints, it's best to raise them with your Iress Account Manager so that we can keep the Community a friendly and welcoming place for everyone.



You're invited

The Community has over 18,000 members from all over the world and is growing all the time.

Come on in and join us

[Visit the Iress Community](#)

Here's what you get from the Iress Community:

Help and best practice

Stay in the know with access to:

- Help articles
- Service updates for known issues
- Case studies and example scenarios sharing best practices
- The latest Iress software releases and highlights

The Community newsletter

A monthly roundup of recently-added content, the latest news and anything else you might've missed straight into your inbox.

"Ask the Community" forums

Dedicated spaces where you can ask questions or bounce ideas off us and fellow members.

Be part of research

Play an active part in what we design and develop by giving your feedback in Community surveys and forums. You might also get invited to be a guinea pig for Iress Labs.



We've saved the best bit for last

Access to the Iress Learning Centre and Iress Community is completely free of charge! That includes all the training material you could possibly want in a lifetime.

If you'd like our help defining a training package for your business, get in touch. We can also chat through any custom requirements.

Got a question?

We'd love to hear from you. Drop us a line at training@iress.com or through your Iress Account Manager.



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