Practice Management Supplementary Course

What is this course about?

This course is designed to give you a detailed look at the practice management capabilities of XPLAN.

This is an interactive session where you will observe demonstrations as well as participate in activities that are structured to provide you with an understanding of XPLAN, and how you could use the system to provide advice to your financial planning clients. The session covers the following areas:

Templates

- Learn how to create templates of various kinds including email, file note, task and diary.
- Look at how templates can be used to increase efficiencies within the practice.

Service Benchmarks

- Learn how to create Service benchmarks

Review Management

- Learn how to record and complete client reviews.
- Learn how XPLAN can help you to manage regular client reviews.
- Learn how to search your client database based on review criteria.

Campaigns

- Learn how to create campaigns, track client responses to invitations and analyse current and past campaigns.

IRESS Limited
Level 11
57 Fort St
Auckland 1010
New Zealand

T (09) 300 5570
enquiries@iress.co.nz
www.iress.co.nz

Offices in
Australia, Canada, Hong Kong, New Zealand, Singapore, South Africa, United Kingdom.

Who should attend this course?	• Administration staff • Practice Managers • Planners who do their own administration • Principals who want to know about the 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, participants will be able to: • Create email, note, task and diary templates • Create Service Benchmarks to track and report on service provided to clients • Create client lists in order to produce management reports • Create and update client review records • Create campaigns and track and report on client responses to campaign invites
How do I register for this course?	Contact your Account Executive or view the XPLAN Training Listing on our website.