Managing client data integrity

What is this course about?

This course brings together existing XPLAN features and functionality to help advisers, principals and site administrators manage client data integrity.

The start of the session examines ways of ensuring client data integrity using advanced searches, automated alerts, data mining and report generation. We then look at how to manage client service delivery through automated benchmarks, client lists and management reports. Finally, we examine how to use CommPay and data mining to check the integrity of client fees and associated services.

Who should attend this course?

- XPLAN users who manage client data integrity.

Recommended Pre Learning

- New User classroom session or video recording
- Practice Management Introduction, and Practice Management Advanced classroom sessions
- Video suggestions:
    - Service Benchmarks
    - Search Criteria

Time

1 hour

Learning Outcome

After completing this course, participants will understand how to:

- Manage client data integrity
- Manage client service delivery
- Check client fee and service integrity using CommPay data

How do I register for this course?

Contact your Account Executive or view the XPLAN Training Listing on our website.