

# Practice Management - Automation Session description

Xplan June Major Release



## What is this session about?

This session provides an in-depth understanding of how the Xplan modules Scheduler, Leads, Alerts Manager and Action Manager fit within the advice journey. Participants will learn to effectively build, manage, report and automate business processes whilst also developing structured guidelines to standard process. These tools assist with managing clients, the advice processes and compliance obligations. This is achieved through expert knowledge, hands-on application, interactive exercises and real-life scenarios.

The session covers the following main areas:

### **Scheduler**

- Create a Schedule
- Run a Schedule

### **Leads**

- Create a Lead
- Activate a lead against a client in Xplan
- Update a Lead
- Report on Leads

### **Alerts**

- How Xplan Exception & Compliance Management provides advisers and dealer groups with a mechanism for running automated, exception-based rules across your client database.
- Compliance rules can be built around client and portfolio data.

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**Action Manager**

- Add barcodes to your Xmerge documents
- Setup the actions
- Execute an Action Manager document

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**Who should attend this session?**

- Administrators / Practice Managers / Site Administrators
- Advisers who do their own administration
- Principals who want to know about the more advanced Client Relationship Management (CRM) capabilities of Xplan.

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**Pre-Requisite**

- Completion of an Xplan New User session.
- Good knowledge of Financial Planning concepts.
- Knowledge of Advanced Search and Templates

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**Time**

Half Day

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**Learning Outcome**

After completing this session, you should be able to:

- Create a Schedule to automatically activate a review process.
- Use Leads to track and manage business opportunities.
- Use Alerts Manager to identify opportunities and breaches on both client and portfolio data.
- Create barcoded Action Manager documents to automate activities within Xplan

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**How do I register for this session?**

Please visit our [website](#) for the Xplan training schedule and registration form.

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