Practice Management Session description

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iress

What is this session about?

This session 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 and add to clients.
- Track and report on services provided to clients

Client Searching & Reporting

- Learn how to create client lists to search the database.
- Learn how to run various management reports.

Review Management

- Learn how to manage client reviews.

Scheduler

- Create a Schedule to automate process
- Run a Schedule

Who should attend this session?	• Administrators / Practice Managers • Advisers who do their own administration • Principals who want to know about the more advanced Client Relationship Management (CRM) capabilities of Xplan.
Pre-Requisite	• Completion of an Xplan New User session. • Good knowledge of Financial Planning concepts.
Time	Half Day
Learning Outcome	After completing this session, you should be able to: • Create email, note, task and diary Templates • Create Service Benchmarks to track and report on services provided to clients • Create client lists to search the database, and run management reports • Manage client review • Use Scheduler to automate processes like Reviews
How do I register for this session?	Please visit our website for the Xplan training schedule and registration form.

Iress Training

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

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