Review Management Supplementary Session

What is this session about?

This session is aimed at providing participants with the knowledge and experience of using example (case) threads, service benchmarks and the advanced search functionality to manage your review clients. This is achieved through expert knowledge, hands-on application, interactive exercises and real-business processes.

This session provides an in-depth understanding of how the XPLAN software and its review management capabilities fit within your business processes. Enabling participants to follow the workflows to complete and update clients Opt-in, Disclosure Statement, Review and Service Benchmark information.

Who should attend this session?

- Planners wanting to utilise XPLAN to support client reviews.
- Administration staff wanting to manage a review process.
- Practice Managers required to design a review process.
- System Administrators

Pre Requisite

- Completion of an XPLAN New User session.
- Good knowledge of Financial Planning concepts

Time

- Half day

Learning Outcome

After completing this session, participants will be able to:

- Use an example thread to manage a new business process.
- Manage and maintain clients Opt-In/Disclosure Statement and Fee for Service details.
- Create and update client review records.
- Apply Service Benchmarks to clients.
- Create client lists relating to reviews and Opt in anniversaries.
- Use an example case thread to manage a review process.
- Use Digital Signatures to set a document to be digitally signed by your client.

How do I register for this session?	Contact your Account Executive or view the XPLAN Training Listing on our website.