

Course Name: *Business Tools*

Overview of Course

Business Tools looks at how to best utilise the software systems used in an Adviser's practice and how to gain maximum efficiencies in conducting day to day activities.

iQ:eQ have worked with large financial institutions and at an adviser's practice level to deliver expertise in VisiPlan, AdviserCentral, ASSIRT and COIN.

Learning Outcomes

At the end of the course you will be able to:

- Demonstrate an understanding of how business tools can be best integrated into your practice
- Illustrate how to gain efficiencies in key processes within your practice
- Have the knowledge to effectively utilise the business tool to complete required tasks such as generating Statement of Advice, conducting reviews, performing mail merges and marketing campaigns

Features and Benefits

- Training is modular based and participants can attend the required training without wasting time on irrelevant information
- The workshop provides participant with useful resources designed to be used back in the workplace
- Proven results in improving efficiencies within an Adviser's practice

Audience

The course is available for anyone within an Adviser's practice performing specific tasks utilising a business tool

Pre Requisites

This course requires participants to be working within the Financial Planning Industry.

Course Material

A manual with reference guides will be provided to the participants.

How to find out more

Send an e-mail to info@iq-eq.com.au or contact us on 1300 799 994.

Investment

Sessions may be conducted face to face classroom style, onsite or over the phone coaching. Please contact iQ:eQ for more information.

