Jacana LTD
Management Training Consultancy

<u>North East 1st User Group</u>

<u>Meeting agenda 2010</u>

Date: Wednesday 20th January 2010
Approx finish time: 4.00 pm
Subject: Adviser Office & Marketing
Content:
In this session we will look at using Adviser Office from a marketing point of view. We will look at:

- Why your consultants should complete as full a factfind as possible
- Creating marketing client groups by analysis of the data
- How to send out bulk emails direct from AO
- Using Standard Letters as effectively as possible
- Using Activity Manager and Leads to monitor campaign success

Whilst aimed at those with sales/marketing responsibility within your firm, they will require some knowledge of AO to get the most from the day (or have someone with them that does).

Date: Wednesday 17th February 2010
Approx finish time: 2.30 – 3.00 pm
Subject: Document Management Systems
Content:
In this session we will be looking at the two most popular document management systems – INVU and Watermark.

The morning session will be 10.30 am to 12.00 noon and will be presented by Tim Boggie of Watermark and Jim McCarry of ScanX, a Watermark reseller based in South Shields.

The afternoon session will be 1.00 pm to 2.30 pm and will be presented by Steve Smith of Linden House who will be demonstrating the INVU system. Linden House as well as being an INVU reseller also provides the software that integrates INVU with Adviser Office.

This session is aimed at those with decision making responsibilities within your firm.

Date: Wednesday 17th March 2010
Approx finish time: 4.00 pm
Subject: Creating a Word-Based Factfind & Client Report
Content:
In this session we will look at the process of taking the default word-based factfind supplied within AO, and turning it into a bespoke factfind for your own company. We will be editing the main template, as well as looking at each of the sub-templates in turn. We will also discuss the setting up of the blank factfind versus the populated one.

We will also take a brief look at the doing the same for a word-based client valuation report.

To get the most out of this session, those attending must have a good day-to-day working knowledge of Microsoft Word

Date: Wednesday 21st April 2010
Approx finish time: 4.00 pm
Subject: A review of Adviser Office
Content:
Rather than a session aimed specifically at new users of the system, in this meeting we will be looking at key functionality within AO and will be providing lots of hints and tips to get the most out of the system.

The session will therefore be useful for new users but also useful for existing users, especially any who have not received any recent training on the system.

Date: Wednesday 19th May 2010
Approx finish time: 1.30 pm
Subject: Adviser Office Forum
Content:
This is the first of two such sessions, which will look at discussing issues surrounding Adviser Office, with the aim of having those issues commented upon by a 1st software representative at the September meeting. It will give users the opportunity to raise any suggestions, questions or problems that they may have for or with the software. The session will be best attended by office/system managers and senior administrators.

Date: Wednesday 16th June 2010
Approx finish time: 4.00 pm
Subject: Data Cleansing
Content:
This is another chance to look at the process of cleansing your database:

- What do you need to look out for in terms of the maintenance files and the clients' personal and plan data?
- How do you go about making the changes required?
- And once the data has been cleansed how do you maintain the new found integrity of the information held?

The session will again best be attended by office/system managers and senior administrators.

Date: Wednesday 15th September 2010
Approx finish time: 4.00 pm
Subject: Forum Response & AO/Roadmap Update
Content:
This session will be presented by Karen MacKenzie from 1st – The Exchange. Karen will firstly provide feedback on the documentation we issued following our Forum meeting in May; advising what suggestions have and have not been accepted, and where additional work is required. The second part of the session will see Karen provide a summary of the evolution of AO since her last visit and a heads up on forthcoming developments as well as the longer term roadmap.

Once again the session will best be attended by office/system managers and senior administrators.

Date: Wednesday 20th October 2010
Approx finish time: 4.00 pm
Subject: Financial Scenario
Content:
At this meeting we will take a detailed look at the functionality within the Financial Scenario module and any other wealth planning functionality that may be then available on the system:

- What data is required and how does it need to be stored?
- Setting up your assumptions
- Using the functionality available
- Creating subsequent reports

This session is expected to be most useful for those providing advice for the consultants, or for the consultants themselves if they do their own planning.

Date: Wednesday 17th November 2010
Approx finish time: to be advised
Subject: to be advised
Content:
This session has been left empty for the moment. The content will be decided upon and advised later in the year.

Date: Wednesday 15th December 2010
Approx finish time: 4.00 pm
Subject: Annual General Meeting & TBA
Content:
The morning session will be a review of the year and the setting of the 2011 agenda. This will be followed by a buffet lunch, and an afternoon training session that again will be decided upon and advised later in the year.