prestwood® PROFESSIONAL

Prestwood® Practice Management 1 Day Course Timetable

10.00 am	Introduction including objectives of the course and overview.
10.15 am	Set-Up Procedures and Basic Data Entry including the use of the New Business Wizard. This section will include a review of the files that must be set up correctly in the first instance. Files include the Employee File, User Names and Passwords File, and Commission Set-Up Files.
11.10 am	New Business Tracking. Tracking in the pipeline business and entering onto the New Business Register.
11.35 am	Break
11.45 am	The Time Ledger – The Client's Notional Account The session will cover methods of recording Staff Time including the use of the Stop Watch, how to keep a record of Client Retainer Fees and how to enter Non-Time Related Charges.
12.15 pm	The Diary - Managing Business Activities and Tasks. Creating Appointments, Reminders and To Do Lists. Create Schedules of Work and Record Business Processes in Checklists. Today's Activities List.
1.00 pm	LUNCH
2.00 pm	Commission Tracking. Recording Expected Commission Income, Reconciling Commission Received, Commission Splits between Advisers and Introducers.
2.40 pm	Contact History. Entering Contact Details, Achieving Effective Recall – Categories and Word Search Facilities, Document Management – Scanned Documents and Attaching Documents to Contact Details, Sending and Attaching Email.

3.15pm	Using Mail Merge Interrogating the Prestwood Databases, Creating a Mailing List Group, Creating an Email Shot for a Mailing List Group, Generating Address Labels. Using Form-Filler.
3.40 pm	Break
3.50 pm	Creating Standard Letters. Creating a New Document Folder and a New Standard Letter, Using Merge Fields, The Standard Letter Template, Creating Standard Paragraphs.
4.15 pm	Review of the Day and Questions
4.30 pm	FINISH

* The course running order may be subject to variation.