

Spotlight Champions

Ensuring you have the right people in the right role is pivotal for your success. In a firm of any size, you need to ensure that someone is wearing the hats outlined below.

Gatekeeper / Coordinator

Suggested user role: Admin

This champion should be responsible for gatekeeping your Spotlight account. They will need to ensure a Report Cover is set-up. They will be responsible for setting up all staff with user access. Lastly, this champion should also be responsible for deciding which clients receive what type of Spotlight Report and how regularly.

Allocated: _____

Quality Controller

Suggested user role: Partner or Manager

This champion is responsible for ensuring the outputs add value to the client. Reports should ensure fundamental areas of the clients business are being addressed. They should review the reports before they are presented to the customer, provide feedback to the creator and help staff grow.

Allocated: _____

Education

Suggested user role: Manager or Standard

This champion is responsible for keeping up to date with product releases and embracing changes as relevant. This person should also hold internal training sessions as relevant to share knowledge within the team.

Allocated: _____

Templates & Set-up

Suggested user role: Partner + Manage templates

This champion should work closely with the gatekeeper to make sure that all users have the correct resources available to them. This champion should make sure the Practice Settings are kept up to date and that there are templates available firm-wide for all users to use.

Allocated: _____

Internal / Preparation

Suggested user role: Manager + Manage template

This champion is responsible for the efficient preparation of outputs. This champion needs to be fully trained on Spotlight and preferably certified. This champion will need access to the Templates. If you want them to be able to edit or create templates, they will need 'manage template' access as well.

Allocated: _____

External / Client

Suggested user role: Standard

This Champion is responsible for educating clients on the benefits of a Trusted Advisor relationship and demonstrating additional value for clients. They will probably be the person who meets with the customer and presents the reports on a regular cadence.

Allocated: _____