12 steps to Getting Started with Spotlight Reporting

1. **Complete 30 Minute Intro Training:**
   - [ ] Get your first output market ready in 30 minutes - select an active client or your own firm.
   - [ ] Choose which product to lead with, a Report, Dashboard, or even draft budget

2. **Complete System Admin:**
   Under Settings
   - [ ] Upload company logo
   - [ ] Update Reporting Names
   - [ ] Customize Footer Disclaimers
   - [ ] Set your report cover template or use the default
   - [ ] Invite 2+ key users
   - [ ] Update schedules (if starting with Forecasting)

3. **Select Two Clients**
   - [ ] One is prepared in the training as above
   - [ ] Second report prepared within 14 days of training
   - [ ] Use a “Standard” template / Classic Dashboard or the Profit and Loss Budget
     - [ ] Commentary (Action Plan or an Executive Summary)
     - [ ] Profit and Loss
     - [ ] Balance Sheet
     - [ ] Cash
     - [ ] KPI if you have information available
   - [ ] Use the Checklist - how to prepare an output in 45 minutes
     (This can be found in the Scaling your Advisory Practice module, Best Practice: Report Preparation episode in the Sample Report checklist)

4. **Present Reports to clients** (within 21 days of training session)
   - [ ] Use the Meeting template - cheat sheet topics for an advisory meeting
     (This can be found in the Scaling your Advisory Practice module in the How to Run the Perfect Advisory Session episode)

5. Complete the **Service Opportunity Matrix** for the two clients selected
   (This can be found the Advisory Services module in the Define your Services episode)

6. Update definition **target client**
   - [ ] Ideal clients checklist
   (This can be found in the Advisory Services, Ideal clients episode)

7. Select the **next Two Clients**

8. Get more **junior member** to prepare second report (using the checklist above)

9. **Update** one aspect of the second report:
   - [ ] Change or customize a chart
   - [ ] Include a KPI
   - [ ] Report by tracking categories
   - [ ] Review liquidity metrics

10. **Complete certification** (or have your identified super user / champion do so) - this should be completed within 60 days of sign up.

11. At the end of each month conduct a 30 minute **Internal Review**. This should include all team members who are involved in the preparation and / or selling of services;
    a. What clients have been presented to?
    b. What outputs did they recieve?
    c. What resonated with the clients & why?
    d. What are the next steps with clients - regular meetings / forecast / etc? (refer menu of services)
    e. What were the investment levels for those clients?
    f. What were the internal learnings / opportunities / improvements?
    g. Who are the next clients?
    h. What does an ideal client look like?
    i. Who excelled internally?
    j. Who is identifying opportunities externally?
    k. Has the strategy been conveyed to the team - do they understand and are they onboard, or is this a session required?

12. Have **KPIs** been set across the team?
    - [ ] Number of clients to target
    - [ ] Meeting cadence
    - [ ] Does every client have a budget loaded into their accounting system
    - [ ] Output at the end of a piece of work I.e Dashboard with period end compliance / 1-2 draft budgets per month.