



# CHECKLIST



**3...2...1...GO!**

- Sign up for the Super VCFO program with a 25% discount
- Add your staff to Spotlight Reporting
- Kick off meeting with Chelsea, our Customer Success Specialist
- Watch our free Reporting and Forecasting training webinars
- Discuss with the team which clients will benefit your new offerings. Each team member to pick at least one client
- Think about incentives for the team to get clients on board. Prizes?
- Attend Masterclass training for all of the team
- Customise your reports in Spotlight (set up your practice preferences and logo)
- Build your templates
- Plan how to market your new services to clients (personal letters, eDMs, etc.)
- Execute the plan!