myprosperity

Implementation checklist for Champions

As your practice champion, you play an important role in keeping implementation moving and supporting your team through change. Use this checklist to coordinate key activities, monitor milestones and maintain momentum from preparation through to launch and early adoption.

Roll out plan signed off

- [ ] Jointly defined objectives and timelines to guide implementation
- [ ] Implementation plan reviewed and signed off by all stakeholders

Communication

- [ ] **Internal communication:** myprosperity announcement, including why and launch date
- [ ] **Internal communication:** Launch
- [ ] **External Communication:** Have you communicated to your clients your why?

myprosperity portal set up

- [ ] Can you log in?
- [ ] Ensure your app is configured:
  - Is you logo correct?
  - Is the business information and contact details correct?

  View guide
- [ ] Download and test your app
- [ ] Invite your staff to access the portal

  View guide
- [ ] Configure user roles and permissions based on staff members' responsibilities
- [ ] Integrate key systems like Xplan, SharePoint, financial datafeeds, eSigning integrations or FYI
- [ ] Review and test your digital form
- [ ] Understand and select which client views your firm will utilise

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Enablement / Training

- [ ] Self-paced learning completed
- [ ] Have your staff completed the self-paced learning?

Early usage

- [ ] Onboard your first client
  View guide
- [ ] Onboard 5 clients within the first 30 days
- [ ] Have you sent a digital form/s to client/s
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- [ ] Have you uploaded and shared documents?
  View guide
- [ ] Have you sent a form to utilise the digital signing feature?
- [ ] Have you created and assigned a task to a client?
- [ ] Confirm that data from integrations (e.g., Xplan or financial feeds) is syncing without issues
- [ ] Ensure at least 50% of assigned staff have logged in and engaged with the portal features



Need more resources?

Access all guides, training videos, webinars and more through our **Partner Help Centre**

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