The SIAP checklist for new partners

Welcome! We're thrilled that you've joined the **Sage Intacct Accountants Program (SIAP)** from CPA.com and Sage Intacct. Your SIAP peer firms know that there's a roadmap to getting the full value from the program – onboarding is just the start. We've developed this practical, step-by-step checklist of actions your firm should take to get the most out of your journey.

We're here to help every step of the way, let's get started.



Jump-start your enablement roadmap

- ✓ **Get certified.** Make sure your team finishes the Accounting Specialist and Implementation Specialist certifications within six months of joining SIAP.
- ✓ **Join our Partner Enablement sessions.** Join the quarterly business reviews and your first-year strategic presentation to set firm goals and establish benchmarks.
- ✓ **Lean on your Partner Account Managers.** Your CPA.com and Sage Intacct account managers can help track milestones and troubleshoot challenges. Use them!



Connect with the SIAP community

- ✓ **Head to the Highspot Portal.** The portal is packed with product knowledge, marketing tools, white-label templates, and sales resources. It's also a valuable way to stay current with product updates, partner newsletters, and best practices.
- ✓ **Collaborate and connect.** Participate in Sage Intacct discussion boards and office hours to take advantage of the insights from peers, Sage experts, and top-performing firms.

Accelerate your practice development

- ✓ **Join the CAS coaching cohort.** CPA.com's CAS Practice Transformation Coaching program was designed to help you refine your pricing models, staffing strategies, and service offerings. Use it to strengthen and scale your CAS practice.
- ✓ **Step up your marketing game.** The SIAP can help you launch campaigns with white-label collateral and website-in-a-box content. Highlighting your firm's new Sage Intacct capabilities in marketing and client outreach which will help spark new conversations and drive new leads.
- ✓ **Staff up.** Considering assigning or hiring a professional focused on growth – a cornerstone of the Eight Keys to Success.
- ✓ **Crank up the demos.** Use your Sage Intacct demo accounts and advanced product demonstrations to win over new prospective buyers.

Never stop learning

- ✓ **Take advantage of premier events.** Sage Transform and the Digital CPA Conference are widely considered to be some of the top events for networking and gaining new product insights – mark them on your calendar and make a plan for attendance.
- ✓ **Plan your future in Quarterly Reviews.** Work with your partner managers quarterly to assess KPIs and adjust your business plan as your firm grows.
- ✓ **Embrace a continuous education mindset.** Webinars, advanced boot camps, and pre-release product training are all valuable tools to help ensure your team stays at the cutting edge of what's next.

Dive in

- ✓ The SIAP is a valuable tool for growing your practice, packed with resources designed especially for firms like yours. But it's only as valuable as your team's level of engagement with the program. Don't wait to engage – it's time to strike while the iron's hot. Start by logging into the Highspot portal today and explore CPA.com's Professional Services resources to keep the momentum going.