



# SPOTLIGHT

Scope and Implementation  
2022-23

**The Landmark Spotlight series of e-booklets/fact sheets will provide you with a ready source of material to send to clients and prospects on advisory services.**

If you use the booklets, and we have added a few suggestions in this document, they will help to reinforce your reputation as an expert adviser and promote ideas that may lead to new client conversions or cross-sales opportunities.

The booklets are updated for all changes that affect the tax year 2022-23.

## Branding – first job, change our logo and contact details

Before you use the Word format files we give you access to you will need to change the cover page footers. Simply add your logo and contact details and delete Landmark's details.

Once this is done, save each amended Word file in a PDF format and use these PDF files when you send booklets/fact sheets to clients or prospects by email.

Make sure that all your staff have ready access to the Spotlight series. More on how staff can make good use of Spotlight are expanded on below.

You could also colour print the PDFs and display as handouts in your reception area..

PLEASE NOTE: there are no copyright restrictions on your use of our Spotlight material. You are free to edit, change the design or repurpose as you see fit.

## Updates

Spotlight is a recurring annual subscription. Each year we will update relevant publications for changes at budget time and add any new topics that we feel are relevant.

If changes to legislation occur mid-year, any updates will be taken care of at no additional cost.

## Clients and prospects - making the most of Spotlight

Ideas to use Spotlight fact sheets in your interactions with clients include:

- Attach a copy of specific Spotlight publications – that you know will have relevance to the clients – when you send accounts or tax return for review or signature, or when you send final accounts etc., with your bill....
- Use relevant fact sheets if you need to illustrate a particular problem or issue that clients may need to address. This will help you close more cross-sales opportunities.
- Send all new prospects/contacts a copy of the consolidated Spotlight edition (that includes all the various topics as chapter headings). This will help to establish your practice as an adviser worthy of their consideration.

## Staff and partners – making the most of Spotlight

- Make sure that all partners and staff have access to your rebranded Spotlight PDF files.
- Make sure that staff read the consolidated handbook version of Spotlight 2022-23. This can be recorded as part of CPD reading and will help to keep staff in the loop on current thinking on the topics covered.
- Encourage staff to send copies of PDF documents to friends or associates that may trigger new client acquisitions or cross-sales opportunities with existing clients.

## Referral sources – making the most of Spotlight

Consider providing copies of Spotlight documents to your referral sources, with the proviso that they display your branding details on the front cover.

## Like more topics covered by Spotlight?

We are happy to consider adding new fact sheets to the series. Email any suggestions you may have to [bob@landmarkpd.co.uk](mailto:bob@landmarkpd.co.uk).

Also, please share your success stories, how has using Spotlight had a positive impact on your practice?

## We are here to help

If you want to discuss ideas to implement Spotlight use in your practice, our founder/director Bob Edwards is willing to exchange ideas with you. Call him any time 07879 896073 or email [bob@landmarkpd.co.uk](mailto:bob@landmarkpd.co.uk).

You can also book a call-back online at <https://landmarkpd.co.uk/book-a-call/>

Bob Edwards and the Spotlight editorial team – March 2022