1 ENTICE

Generating new business with your enticing offer to your target market

ENTICE

STEP 1 - ENTICE

Generating new business with your enticing offer to your target market

Welcome to the first step in the Client Engagement Process Skills Goodie Bag.

'Entice' is the first of six easy steps designed to help you support your advice business and streamline your client engagement process.

It contains 3 'marketing' templates that are ideal for businesses that need marketing assistance to create brochures or documents.

What's it all about?

Entice is about generating and attracting new business and interest in your target market. The step comprises of three templates you can use, depending on your market, as a framework from which to create your own marketing brochure, document or other marketing collateral. These are examples only to make sure you are on the right track. The fourth template in this step provides direction around how to tailor the content to suit your specific clients and target their needs.

The examples we have used are for:

- Business owners
- CEOs and senior executives
- Health care specialists

What's in it for you?

This step provides suggested comprehensive content for your marketing brochure covering:

- Issues that the targeted markets need answers to
- Details about your offer
- Details about what clients can expect from your offer
- How your offer is delivered
- How to present your document

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ENTICE

1.	ENTICE	TOOL TYPE
Purpose	Generating new business with your enticing offer to your target market	
1.1	Offer to business owners	Marketing
1.2	Offer to CEOs and senior executives	Marketing
1.3	Offer to health care specialists	Marketing
1.4	Template offer using Business Owners as an example	Marketing

TOOL 1.1: Offer to Business Owners
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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THE BUSINESS OWNER'S ADVICE AND CONSULTING PROGRAM

Growing a business doesn't have to be done alone!

If you've devoted many years to building your business like most business owners have, you'll have a whole lot of questions you haven't had time to get the answers to. At <*business name*> we run a successful small business too! So we're aware of many of those questions you have. And we'll take the time to understand the other issues that are specific to you.

Are these some of the questions that you need answered?

- How can I maximise the value of my business?
- When is the best time to sell my business and when is the best time to transition out?
- Financially should I be taking more out of the business and investing personally?
- Do I have the appropriate protection/insurances in place – for my business, my family and my future?
- How can I reduce the amount of tax I pay?

Our research shows these are some (but definitely not all) of the important issues that business owners need advice on.

This program is all about you!

The components of the Business Owners Advice and Consulting Program are delivered in order of priority and within a time frame that works for you.

Therefore, you will receive all the advice to help you achieve the things that are most important in your life:

- The growth of your business
- A structured business exit plan
- Strategies to protect your assets, your income, your family and your future

TOOL 1.1: Offer to Business Owners
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
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- An investment plan to fund the lifestyle that is important to you –now and in the future
- The confidence and reassurance that someone is looking after your best interests and working with you in an environment of trust, empathy and care.

WHAT CAN YOU EXPECT FROM OUR PROGRAM?

A Personal tax savings and effectiveness plan – Documented advice on all matters tax, receiving your employee share entitlements, exercising your options, salary sacrificing, salary packaging, agri-investments, other tax effective investment strategies and trust establishment.

Personal investment plan – Strategies that will help you make the appropriate investment decisions to achieve what's important to you both now and in the future. This plan will be developed after examining all the options available to you including investment property, shares, managed funds and tax effective investments.

Personal protection plan – Protection strategies for your non-business assets including your home, car and family assets.

Asset ownership plan – Ensuring you have the appropriate strategies in place for the current and future ownership structure of your assets and wealth.

Debt management plan – A review of your current personal and investment borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current investment borrowings and/or funding future investments or home renovations or upgrade.

TOOL 1.1: Offer to Business Owners
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

HOW DO WE DELIVER THIS PROGRAM?

We listen – We spend a lot of time understanding what's important to you. Once we understand your priority needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time frames and indicative costs.

We introduce – Helping you achieve your goals and objectives will normally require advice from more than one specialist adviser or consultant. We will liaise and schedule appointments with the appropriate specialist(s). At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

We advise – At a subsequent appointment we will present the advice and discuss it in detail encouraging your questions and ensuring you understand why it has been recommended to you.

We document – Our advice will be documented including all the detail around recommended products if applicable, related fees and charges, why this advice has been recommended and how it will help improve your situation.

We monitor – We monitor all the issues that may influence the appropriateness of this advice on an on-going basis. We advise you of any changes that may need to be considered due to changes in your circumstances, the business, economic or legislative environment.

We communicate – Your advisory team will maintain frequent contact through various means at the relevant time. This may include face-to-face meetings, our regular publications, our website etc. Of course, we encourage you to call us at any time if there are queries or issues you would like to discuss.

We care – You and your wellbeing is what's important to us. We will always act in your best interest and make decisions that deliver the best outcomes for you.
Your success is our success!

TOOL 1.1: Offer to Business Owners
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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PRESENTATION OF THIS DOCUMENT

Options to present this offer are:

- Printed: In any desired format such as A4 double sided, A4 folded pamphlet or plain A4 to add to a presentation folder. Examples below.
- Electronic: In pdf file or displayed as an attachment on your website.

A4 double sided example:

First side – Introduction, positioning and offer
Reverse side – The explanation, business contact and general info

A4 folded example:

Page 1 – Cover
Page 2 – Introduction, positioning and the offer
Page 3 – The explanation
Page 4 – General and contact information

It would be valuable to receive advice from a marketing specialist / graphic designer on an appropriate template for the presentation of this offer that is aligned with your business brand.

TOOL 1.2: Offer to CEOs and senior executives
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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THE CEO AND SENIOR EXECUTIVE ADVICE AND CONSULTING PROGRAM

Now there's someone to look after you while you're looking after the company!

We know you have dedicated many years to the development and success of your company and have been focused on the needs of the board, the shareholders, the employees and your clients. Therefore, there hasn't been much time to obtain the answers to all those questions you have about financial matters, your investments and you and your family's future.

How do we know this? Because at *<business name>* many of our clients are executives like you working with both listed and private companies in industries ranging from financial to resources. So we are aware of many of those questions you have. And we'll take the time to understand the other issues which are specific to you.

Are these some of the questions you need answered?

- When is the best time for me to retire?
- When should I exercise my options?
- How do I manage my employee share entitlement in the most tax effective way?
- Should I take my super benefit as a lump sum or pension or both?
- How am I affected by the new super rules?
- What should I do with my investment properties?
- Should I be investing more in superannuation, tax effective investments or property?
- Should I be transferring some of my assets to the children now or later?
- What are the appropriate protection strategies for my family, my assets and my income?

Our research shows these are some (but definitely not all) of the important issues that CEOs and senior executives need advice on.

TOOL 1.2: Offer to CEOs and senior executives
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

This program is all about you!
The components of the CEO and Senior Executive Advice and Consulting Program are delivered in order of priority and within a timeframe that works for you. Therefore, you will receive all the advice that will help you achieve your goals and your objectives.

Tax effective strategies for you in your current and future life phases include:

- A structured corporate exit plan
- Strategies to protect your assets, your income, your family and your life now and in the years ahead
- An investment plan to fund the lifestyle that is important to you – now and as you exit the workforce
- The confidence and reassurance that someone is looking after your best interests and working with you in an environment of trust, empathy and care.

WHAT CAN YOU EXPECT FROM OUR PROGRAM?

A Personal tax savings and effectiveness plan – Documented advice on all matters tax, receiving your employee share entitlements, exercising your options, salary sacrificing, salary packaging, agri-investments, other tax effective investment strategies and trust establishment.
Personal investment plan – Strategies that will help you make the appropriate investment decisions to achieve what's important to you both now and in the future. This plan will be developed after examining all the options available to you including investment property, shares, managed funds, and tax effective investments.
Personal protection plan – Protection strategies for your non-business assets including your home, car and family assets.
Asset ownership plan – Ensuring you have the appropriate strategies in place for the current and future ownership structure of your assets and wealth.
Debt management plan – A review of your current personal and investment borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current investment borrowings and/or funding future investments or home renovations or upgrade.

ENTICE

TOOL 1.2: Offer to CEOs and senior executives
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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HOW DO WE DELIVER THIS PROGRAM?

We listen – We spend a lot of time understanding what's important to you. Once we understand your priority needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time frames and indicative costs.

We introduce – Helping you achieve your goals and objectives will normally require advice from more than one specialist adviser or consultant. We will liaise and schedule appointments with the appropriate specialist(s). At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

We advise – At a subsequent appointment we will present the advice and discuss it in detail encouraging your questions and ensuring you understand why it has been recommended to you.

We document – Our advice will be documented including all the detail around recommended products if applicable, related fees and charges, why this advice has been recommended and how it will help improve your situation.

We monitor – We monitor all the issues that may influence the appropriateness of this advice on an on-going basis. We advise you of any changes that may need to be considered due to changes in your circumstances, the business, economic or legislative environment.

We communicate – Your advisory team will maintain frequent contact through various means at the relevant time. This may include face-to-face meetings, our regular publications, our website etc. Of course, we encourage you to call us at any time if there are queries or issues you would like to discuss.

We care – You and your wellbeing is what's important to us. We will always act in your best interest and make decisions that deliver the best outcomes for you.
Your success is our success!

TOOL 1.2: Offer to CEOs and senior executives
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

PRESENTATION OF THIS DOCUMENT

Options to present this offer are:

- Printed: In any desired format such as A4 double sided, A4 folded pamphlet or plain A4 to add to a presentation folder. Examples below.
- Electronic: In pdf file or displayed as an attachment on your website.

A4 double sided example:

First side – Introduction, positioning and offer
Reverse side – The explanation, business contact and general info

A4 folded example:

Page 1 – Cover
Page 2 – Introduction, positioning and the offer
Page 3 – The explanation
Page 4 – General and contact information

It would be valuable to receive advice from a marketing specialist / graphic designer on an appropriate template for the presentation of this offer that is aligned with your business brand.

TOOL 1.3: Offer to health care specialists
PURPOSE: A framework for the design of a marketing brochure targeting health care specialists.

THE (BUSINESS NAME) HEALTH CARE SPECIALIST ADVICE AND CONSULTING PROGRAM

Now there is someone to look after you while you are looking after others!

We know you have devoted many years to looking after others and have not been able to find the time to obtain the answers to all those questions you have about financial matters, your business and you and your family's future.

How do we know this? Because at (Business Name) many of our clients are Health Care specialists like you – Medical Specialists, Chiropractors', Medical Practitioners operating their own practice. So we are aware of many of those questions you have. And we'll take the time to understand the other issues which are specific to you.

Are these some of the questions that you need answered?

- How can I legitimately pay less tax?
- How can I build value in my practice and protect that value in the future?
- Is the current ownership structure for my practice the most appropriate for me?
- Do I have the appropriate protection in place – for me as a professional, my business, my family, my future?
- How can I best fund the acquisition of new equipment and the expansion of my practice?
- Should I be investing more in superannuation, my business or property?

Our research shows these are some (but definitely not all) of the important issues on which health care professionals need advice.

TOOL 1.3: Offer to health care specialists

PURPOSE: A framework for the design of a marketing brochure targeting health care specialists.

The (Business Name) Health Care Specialists Advice and Consulting Program

This program is all about you!

The components of the (Business Name) Health Care Specialists Advice and Consulting Program are delivered in the order of priority for you and within a timeframe that works for you. So you will receive all the advice that will help you achieve what is important to you:

- Tax effective strategies for you and your practice in your current and future life phases
- A structured practice growth and exit plan
- Strategies to protect your assets, your income, your family and your life both now and the years ahead
- An investment plan to fund the lifestyle that is important to you – now and as your work reduces
- The comfort, confidence and reassurance that allows you and your family to sleep peacefully knowing someone is looking after your best interest and working with you in an environment of trust, empathy and care.

What you can expect from our Health Care Specialists Advice and Consulting Program

A Personal and Business Tax Savings and Effectiveness Plan – Documented advice on all matters tax – receiving your income, structuring your business, planning for retirement, exiting your business and investing both now and in the future.

Business Improvement and Continuity Plan – Advice that will address all the issues around business succession and protection strategies to ensure the continuance of the business. This Plan will also include appropriate advice on funding business expansion and equipment acquisition specific to your goals and practice growth strategies.

Personal Investment Plan – Strategies that will help you make the appropriate investment decisions to achieve what is important to you both now and in the future. This plan will be developed after examining all the options available to you – including investment property, shares, managed funds, and tax effective investments.

Personal Protection Plan – Protection strategies for your non business assets – your home, car, and the assets and income of your family.

Asset Ownership Plan – Ensuring you have the appropriate strategies in place for the current ownership structure of your business and the current and future ownership of all your assets and wealth.

Debt Management Plan – A review of your current business and personal borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current business borrowings and/or funding future business expansion, personal investments or home renovations or upgrade.

How do we deliver this program?

We listen: we spend a lot of time understanding what's important to you. That's YOU not us! Once we understand your priority advice needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time-frames and indicative costs.

We introduce: helping you achieve what's important to you will normally require advice from more than one specialist adviser or consultant. We will schedule appointments with the appropriate specialist(s) in the order that is a priority to you and within a time-frame that works for you. At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

We advise: At a subsequent appointment we will present this advice to you and discuss it in detail encouraging your questions and ensuring you understand why it is appropriate for you.

TOOL 1.3: Offer to health care specialists
PURPOSE: A framework for the design of a marketing brochure health care specialists.

We Document: Our advice to you will be documented, including all the detail around recommended products if applicable, related fees and charges, why this advice is appropriate to you and the value you will experience from this advice.

We Monitor: We monitor all the issues that may influence the appropriateness of this advice on an on-going basis and advise any changes that may need to be considered due to changes in your circumstances, or in the business or economic environment.

We Communicate: Your advisory team will maintain frequent contact with you through our regular publications, on our website and face to face meetings which are scheduled at appropriate intervals. Of course, we encourage you to call us at any time if there are queries you have or issues you would like to discuss.

We Care: At (Business Name), YOU are what's important to us. We will always act in your best interest, make decisions which deliver the best outcomes for you, and deliver our advice in the order that is a priority to you. Achieving what's important to you is what is important to us!

Presentation of this Document

Here are two options in presenting this offer:

- Printed double sided on A4 paper and included in (Business Name) Presentation Folder, or
- Printed 4 sided on A4 folded or appropriate sized paper which can be used with or without folder

A4 double sided:

First side – Introduction, Positioning and Offer

Reverse side – The explanation, business contact and general info

A4 folded or similar

Page 1 – Cover

Page 2 – Introduction, Positioning and The Offer

Page 3 – The Explanation

Page 4 – General and contact information

It would be valuable to receive advice from a Marketing Specialist on the presentation issues.

TOOL 1.4: Template offer using Business Owners as the target market
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

<OFFER TITLE – something relevant, compelling and specific for your target market>

EG. THE BUSINESS OWNER'S ADVICE AND CONSULTING PROGRAM

<INTRODUCTION, including a heading and text to entice target clients>

Growing a business doesn't have to be done alone!

If you've devoted many years to building your business like most business owners have, you'll have a whole lot of questions you haven't had time to get the answers to. At <*business name*> we run a successful small business too! So we're aware of many of those questions you have. And we'll take the time to understand the other issues that are specific to you.

<POSITIONING – the key questions that are at the top of your target clients minds (or should be)>

Are these some of the questions that you need answered?

- How can I maximise the value of my business?
- When is the best time to sell my business and when is the best time to transition out?
- Financially should I be taking more out of the business and investing personally?
- Do I have the appropriate protection/insurances in place – for my business, my family and my future?
- How can I reduce the amount of tax I pay?

Our research shows these are some (but definitely not all) of the important issues that business owners need advice on.

This program is all about you!

TOOL 1.4: Template offer using Business Owners as the target market
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
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<THE OFFER – outline details of your offer>

The components of the Business Owners Advice and Consulting Program are delivered in order of priority and within a timeframe that works for you.

Therefore, you will receive all the advice to help you achieve the things that are most important in your life:

- The growth of your business
- A structured business exit plan
- Strategies to protect your assets, your income, your family and your future
- An investment plan to fund the lifestyle that is important to you – now and in the future
- The confidence and reassurance that someone is looking after your best interests and working with you in an environment of trust, empathy and care.

<THE OFFER – what clients can expect from working with you – outline the specific components of advice that are provided for this target market>

WHAT CAN YOU EXPECT FROM OUR PROGRAM?

A Personal tax savings and effectiveness plan – Documented advice on all matters tax, receiving your employee share entitlements, exercising your options, salary sacrificing, salary packaging, agri-investments, other tax effective investment strategies and trust establishment.

Personal investment plan – Strategies that will help you make the appropriate investment decisions to achieve what's important to you both now and in the future. This plan will be developed after examining all the options available to you including investment property, shares, managed funds and tax effective investments.

Personal protection plan – Protection strategies for your non-business assets including your home, car, and family assets.

TOOL 1.4: Template offer using Business Owners as the target market
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
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Asset ownership plan – Ensuring you have the appropriate strategies in place for the current and future ownership structure of your assets and wealth.

Debt management plan – A review of your current personal and investment borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current investment borrowings and/or funding future investments or home renovations or upgrade.

<THE EXPLANATION – how you deliver your offer. You can be general or outline the specific deliverable ie. two meetings perannum>

HOW DO WE DELIVER THIS PROGRAM?

We listen – We spend a lot of time understanding what's important to you. Once we understand your priority needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time frames and indicative costs.

We introduce – Helping you achieve your goals and objectives will normally require advice from more than one specialist adviser or consultant. We will liaise and schedule appointments with the appropriate specialist(s). At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

We advise – At a subsequent appointment we will present the advice and discuss it in detail encouraging your questions and ensuring you understand why it has been recommended to you.

We document – Our advice will be documented including all the detail around recommended products if applicable, related fees and charges, why this advice has been recommended and how it will help improve your situation.

We monitor – We monitor all the issues that may influence the appropriateness of this advice on an on-going basis. We advise you of any changes that may need to be considered due to changes in your circumstances, the business, economic or legislative environment.

TOOL 1.4: Template offer using Business Owners as the target market
PURPOSE: A framework for the design of a marketing brochure targeting business owners.
**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

We communicate – Your advisory team will maintain frequent contact through various means at the relevant time. This may include face-to-face meetings, our regular publications, our website etc. Of course, we encourage you to call us at any time if there are queries or issues you would like to discuss.

We care – You and your wellbeing is what's important to us. We will always act in your best interest and make decisions that deliver the best outcomes for you. Your success is our success!

<Suggested PRESENTATION of this document.>

PRESENTATION OF THIS DOCUMENT

Options to present this offer are:

- Printed: In any desired format such as A4 double sided, A4 folded pamphlet or plain A4 to add to a presentation folder. Examples below.
- Electronic: In pdf file or displayed as an attachment on your website.

A4 double sided example:

First side – Introduction, positioning and offer
Reverse side – The explanation, business contact and general info

A4 folded example:

Page 1 – Cover
Page 2 – Introduction, positioning and the offer
Page 3 – The explanation
Page 4 – General and contact information

It would be valuable to receive advice from a marketing specialist / graphic designer on an appropriate template for the presentation of this offer that is aligned with your business brand.