

FINANCIAL ADVISORS

Business Development Service

This brochure sets out the key aims, objectives and benefits of the Business Development and Marketing Service offered to Financial Advisors based in New Zealand.

This service has been specifically designed to support the business development requirements of Financial Advisors in New Zealand, whilst helping to ensure compliance with the relevant regulations.

It is important to note that the Financial Advisors

Business Development Service is already being delivered within the New Zealand market, and all features are tried and tested, with demonstrable results – this is not a ‘start up’ or speculative venture, rather a roll-out of a proven solution to a wider market.

THIS SERVICE HAS **THREE KEY OBJECTIVES** FOR FINANCIAL ADVISORS

1 **GROW** YOUR CLIENT AND PROSPECT BASE

- Dramatically increase the size of your prospect list
- Convert more prospects to clients
- Qualify your prospects to ensure they are right for your business
- Leverage referrals to develop hot prospects from your existing contacts

2 **NURTURE** YOUR EXISTING CLIENTS

- Regular, relevant communication with your clients
- Seek feedback from your clients and promote regular engagement
- Learn your clients' preferences and behaviours and act on them
- Develop your reputation as a ‘Trusted Adviser’
- Reduce or eliminate client churn

3 **SELL MORE** OF YOUR PRODUCTS & SERVICES PROFITABLY

- Increase your total revenue
- Improve your retained margin
- Develop sales across your entire product portfolio
- Sell more to your existing clients

This Business Development Service is designed to deliver all the above whilst meeting your compliance requirements. Furthermore, this service will help you achieve your business development objectives without a proportional increase in workload, via the intelligent application of software and automation systems.

AN EXAMPLE OF THE CHALLENGES THAT YOUR ORGANISATION MAY FACE:

THE CHALLENGE

GIVING YOUR CLIENTS THE TIME AND INFORMATION THEY DESERVE

Imagine you have a ‘book’ of 100 clients – contacting each of them individually, once per year, by email, phone or post to offer them a review meeting will take quite some time, but is achievable.

Now imagine you have a book of 2,000 clients – it is obviously not possible to individually contact each of them, meaning you must cherry pick those you offer meetings, or more likely just wait until the client contacts you.

Not only are you potentially failing to meet your regulatory obligations but you may well be missing out on major sales opportunities because of your clients' changing circumstances.

THE SOLUTION

PERSONALISED & AUTOMATED CUSTOMER SERVICE

As part of this Business Development Service, every single one of your clients (for whom you have an email address) will receive a **personalised invitation** to organise a review meeting, every year at the anniversary of them becoming a client (or any other date you jointly agree).

Furthermore, if a client wants to organise a meeting with you, they can do so simply by clicking a link in the email and picking a time – the meeting is then booked into both of your diaries without the need for any further emails or phone calls – **simple, quick, effective and extremely impressive customer service**. Meetings can take a variety of formats such as face to face, phone or Skype, etc.

The software automation platforms used as part of this solution are designed to automate and streamline repetitive manual tasks, whilst delivering a highly personalised service to each individual client.

KEY FEATURES

Learn more about the key features of the Financial Advisors Business Development Service. All features listed below are included as part of the standard service and associated fee, unless otherwise stated.



A FULL EMAIL AND MARKETING AUTOMATION PLATFORM

- Developed using Active Campaign (activecampaign.com)
- Full set up and configuration, including contact import from other systems
- Segmentation and list creation (ie. 'active, passive, investors, KiwiSaver, etc.) allowing targeted marketing to specific client or prospect groups. We work with you to create your 'segments' and ensure your contacts are correctly assigned
- Custom field creation – store an unlimited range of personal data for each contact (for example policy numbers, renewal dates, birthdays, golf handicaps, etc.) allowing for very detailed personalisation of marketing content
- Full access - 'your database' - not owned and managed by someone else. You will have your own unique and secure database in Active Campaign with full access rights. Should you decide to cancel your subscription you will retain your Active Campaign account and all data (although you will obviously be required to continue paying the Active Campaign subscription directly)
- Template design and creation. We will create email templates to support your individual, company and group branding
- Three templates - simple, single picture, multi-picture – designed in collaboration with you and any relevant colleagues
- (OPTIONAL) Additional template design services if required.



AUTOMATIONS

Automations allow ongoing, repetitive processes to be fully automated. The automations listed below are included as part of the standard service. Other bespoke automations can be developed as required, subject to any additional charges.

- Customer onboarding (including feedback survey) – designed to provide customers with regular communication and information after they 'sign up'
- Review meeting reminders and scheduling – designed to ensure all relevant clients are offered an annual (or other required frequency) review meeting, either in person, over the phone or via Skype, etc.
- Policy renewal reminders
- Kiwisaver top up reminders
- Others as required (OPTIONAL)

► INITIAL EMAIL

Customer preferences, including customisable survey – designed to encourage all clients to complete a survey to gather their unique preferences and requirements, which can subsequently then be used to target relevant content and information.

► WEEKLY EMAILS

Weekly emails or at a frequency to suit you and/or the client or prospect.

- Choice of content we curate and supply (or provide your own content)

► MONTHLY EMAILS

One provider supported email campaign per month – current examples include:

- Generate KiwiSaver
- Healthy by Sovereign
- Fidelity

We work with a wide range of New Zealand providers to ensure constant variety and choice, or we can focus on your preferred providers.

KEY FEATURES CONTINUED

Learn more about the key features of the Financial Advisors Business Development Service. All features listed below are included as part of the standard service and associated fee, unless otherwise stated.



FACEBOOK PAGE SET-UP AND INTEGRATION

- Set up of Facebook for Business page (if not already present)
- Review, update and optimisation of existing page
- Configuration of 'Call to Action' button using Active Campaign sign up form and automation (used to convert Facebook Page followers into email address contacts)
- Weekly Facebook post to support **email** campaigns
- Monthly Facebook post to support **provider** email campaigns
- (OPTIONAL) Promoted posts to increase activity and response

(OPTIONAL) Promoted campaigns:

- Increase page likes
- Increase email sign ups
- Drive website traffic



SURVEYS

- 2 surveys per annum (in addition to customer onboarding survey)
- Configured and managed using **Survey Monkey** platform (full features without needing to pay for an account)
- Completely customisable to your own requirements
- Designed to suit your branding and appearance
- Use to capture/update any range of customer information for ongoing marketing/communication purposes

95% of companies using automation are taking advantage of email marketing – **Regalix**



CLIENT BOOKINGS

Calendly for automated meeting bookings

- Full set up, configuration and ongoing management
- Creation and set up of customer event types (phone meetings, face to face meetings, full reviews, etc.)
- Integration with Office 365, Google Calendar and other internet calendar options



WEBSITE INTEGRATION

- Replacement of existing web site sign up/contact forms
- Capture contact information directly into Active Campaign
- Includes confirmation automation
- New subscriber notifications
- (OPTIONAL) - Landing page functionality to support campaign activity (requires Wordpress website)



FULL REPORTING

- Weekly summary report, delivered by email
- Monthly full report, delivered by email
- Full, anytime access to Active Campaign and Facebook reporting and analytics

PRICING

Pricing is based on a monthly subscription, with an initial set up fee.

There is no minimum contract term – your subscription is paid monthly in advance but can be cancelled at any time. The initial set up fee is non-refundable.

An annual fee option is also available, in which the 12 monthly payments are paid in advance and the set-up fee is waived.

The pricing shown below includes all software licensing costs required for this service, for a single financial advisor. Additional charges may apply if you have multiple advisors in your business – please contact us for details.

SET UP CHARGE

\$1,000

MONTHLY PAYMENT

\$500

All prices quoted are exclusive of GST

SUMMARY

The business development and marketing service described in this brochure will deliver tangible benefits and significant extra value to your business and, unlike most traditional forms of marketing, offers instant and measurable results.

Given the relatively small costs involved, only a very small increase in revenue is required to justify the investment (or a similarly small reduction in client churn).

Please contact me at paul@paulproctor.co.nz or 027 669 9889 to discuss further or get started.

I can provide references for this service on request.

If you would like to arrange a demonstration of this service please [click here](#) to book instantly.

FINANCIAL ADVISORS **Business Development Service**

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