

# Looking at your business

Presented by Timothy Buchanan

# Timothy Buchanan

## Business Development Manager - South

### My background in Advice

- Former Financial Adviser
- National Distribution Management
- Product distribution
- Licensee management
- Interacted with over 400 practices



“With over 25 years experience, I’ve come to learn a thing or two” – Timothy Buchanan

# Looking at your practice

## Clients perspective

- Physical
- Telephone
- On line
- Process

## Post Covid-19

## Staff perspective

### Two key rules

- Consistency
- Simplicity



# Question?

When was the last time you phoned your business?

On Hold –  
what do you hear?

- Radio
- Messaging
- Nothing

First Client Interaction

- Consistency
- Simplicity

Process

- Available
- Unavailable

Pre – meeting

People

Purpose

Preparation

Parking

Presentation

Task:

## Take a look around your reception area

- Is it visually pleasurable experience?
- Team – Who are your clients dealing with?

*Reception area – definition “the area in a hotel or organisation where guests and visitors are greeted and dealt with.”*

# Your team



Task:

## Take a look around your reception area

- Is it visually pleasurable experience?
- Team – Who are your clients dealing with?
- Clean
- Awards

*Reception area – definition “the area in a hotel or organisation where guests and visitors are greeted and dealt with.”*



Prize alert

Who was Andy Mill famously married to?

## Task:

# Take a look around your reception area

- Is it visually pleasurable experience?
- Team – Who are your clients dealing with?
- Clean
- Awards
- Reading material
- The ‘Hot Seat’
- Marketing collateral
- Privacy

*Reception area – definition “the area in a hotel or organisation where guests and visitors are greeted and dealt with.”*

# Meeting space

- Proxemics
- IT
- Privacy
- Resources
  - Appropriate documentation
  - Audio visual
  - White board
  - Client tools



# Your client cohort

- Business clients
- Building a client cohort
- Client functions
  - Value add
  - Not selling services



# On the walls

- Services
- Artwork
- Informative
- Educational
- Client Cohort
- Motivational



# Online is forever

- Website
- Smartphone
- Social media



# Staff

## Onboarding

- Staff handbook
- Learn and grow
- Open environment
- Internal efficiencies

## Ongoing

- Org chart
- Management



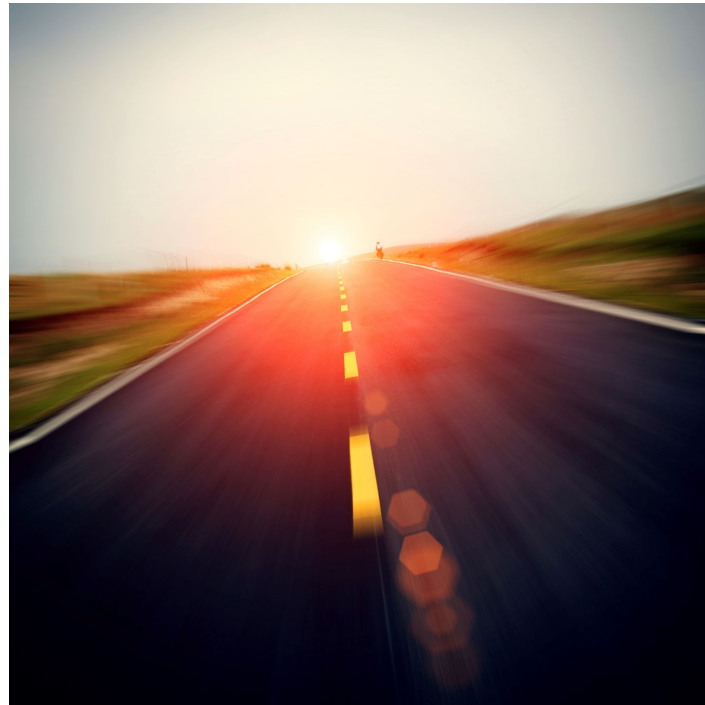
# Prize Alert

What has been a major change with using an ATM in the last ten years, saving banks money and clients time and inconvenience?



# Post Covid – What needs to happen?

## Open forum



# Question?

Which of these three things should your clients be hearing whilst on hold?

A.

Deafening silence

B.

Pre recorded message?

C.

A recording from last years Christmas Karaoke competition?

# Question?

Staff ideas should be considered...

A.

In February

B.

The exception

C.

The expectation

# Question?

Which of these does the term 'Hot Seat' relate to?

A.

“Lock it in Eddie”

B.

The chair in reception which is constantly bathed in sunlight

C.

The chair most commonly chosen by your clients

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<b>Index Funds</b> • Bendigo Defensive Index Fund • Bendigo Conservative Index Fund • Bendigo Balanced Index Fund • Bendigo Growth Index Fund • Bendigo High Growth Index Fund	<b>Active Funds</b> • Bendigo Defensive Wholesale Fund • Bendigo Conservative Wholesale Fund • Bendigo Balanced Wholesale Fund • Bendigo Growth Wholesale Fund • Bendigo High Growth Wholesale Fund

# Support

## Your Business Development Managers

Our dedicated team are here to help



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Thanks for  
participating





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