



## ALL-IN-ONE PACKAGED SOLUTION

# Business HealthClub

## What is HealthClub?

HealthClub allows your business to use Business Health diagnostics whenever and as often as you like, for a flat monthly fee. Importantly, this also includes a quarterly phone call with a Business Health partner; these calls can offer analysis and insights into the diagnostic results of the practice and may include suggestions for actions to improve any areas of concern or interest for the business.

## What will you receive?

You will receive the following business diagnostics: -

- **HealthCheck** - a qualitative and quantitative business diagnostic
- **CATScan Client Survey** - a confidential & anonymous survey that benchmarks results for each practice to its peers
- **Estate Planner** - an estate planning tool that can be offered to clients and prospects
- **BenchMarker** - financial metric benchmarking
- **Six consulting hours per year** - as required
- **Ongoing communication program** - newsletters, blogs, webinars

## Why go to the effort?

The HealthClub provides not only fantastic diagnostics and information on an ongoing basis, it also provides opportunities to engage with existing clients and prospects.

Quarterly phone calls provide an ongoing opportunity for you to discuss your business practices with an experienced professional, ensuring that you and your business gain the maximum possible benefit from the HealthClub.

## Where to from here?

Simply complete the attached form and fax or email to Business Health. For further information or assistance please phone 02 9518 6966.



## FIND OUT HOW HEALTHY YOUR BUSINESS REALLY IS

# Business HealthCheck

It's difficult for most business owners to know exactly what is '*best practice*'. What is the standard ratio of support staff to clients? What is the average level of practice profitability? Is my practice generally performing better or worse than my peers and colleagues? To answer to these questions, it's only a matter of taking a little time and effort. So why not seek out the answers... and benchmark your practice?

### What is the HealthCheck?

The HealthCheck is a unique, objective and innovative self-assessment tool, proven and backed-up by the knowledge and experience of the Business Health team and other leading industry consultants and organisations. It is web-based and accessible twenty-four hours a day, seven days a week and your details remain totally confidential.

Even though the HealthCheck will ask you up to one hundred questions, covering every key area of your practice, it will still only take between 30 - 45 minutes to complete (you can even decide to complete this in stages).

### What will you receive?

By '*HealthChecking*' your practice, you'll not only get an independent assessment of your strengths and weaknesses across 30 different areas. You'll also receive a comprehensive, easy-to-understand report which provides information and ideas to help you improve the efficiency and value of your business.

### Why go to the effort?

Perhaps we should have instead asked - why *wouldn't* you go to the effort? For many this will be the first time you will have an objective assessment of the 'health' of your practice, benchmarked against our national database. Invaluable information and insight which will ensure you are ideally placed to plan the future direction of your business.



## SEE YOUR BUSINESS THROUGH CLIENT EYES

# CATScan Client Survey

Our international research consistently reveals that most practices have no formal process to ask their clients what they think of their services. While it's impossible to refute the wisdom of seeking client feedback, most principals are unfortunately too busy managing the daily 'stuff' to devote time and effort to this area.

### What is the CATScan?

The CATScan is an independent client survey facility, conducted by Business Health on behalf of the practice. It is available in printed and email format. It asks nine specific questions while further gathering a range of qualitative data from your clients such as willingness to refer (their adviser) and future intentions (do they intend to stay with your practice or leave). It takes clients on average around 15 minutes to complete, while all feedback remains strictly confidential. The average response rate is 35% - 40%.

### What will you receive?

You will receive a practical, easy-to-digest and honest appraisal of how your business is performing as seen through the eyes of your most valued clients. The report will further benchmark your nine KPI areas against our overall data base (40,000+ clients). As well, the qualitative responses will be reported while every ad hoc client comment is also captured, verbatim, and fed back to you. Over time, you will have a valuable tool for tracking your performance and measuring client satisfaction levels.

### Why go to the effort?

If you believe your clients are your greatest asset (as well as your most important critics) why wouldn't you want to know how satisfied they are with your service offer?



## THE RIGHT PEOPLE, THE RIGHT WAY, AT THE RIGHT TIME

# Estate Planner

It's a simple fact that most of your clients don't like thinking about what would happen to their family, business and loved ones if something unexpected happened. 50% of Australians don't even have a current Will, for example. How will debts be paid? What will happen to aging parents, dependent children, business partners and even pets? Property, superannuation and money held in bank accounts and shares all need to be carefully considered. **Lots of "stuff" that is extremely important but, for many, not easy to think about!**

### What is the Estate Planner?

The Estate Planner is an easy to use, online tool that can **help your clients take control of their estate - no matter how small or big it might be**. Accessed via a secure weblink, your client will be asked a series of 'point and click' questions about the various aspects of their estate. It will take around 15 minutes to complete.

### What will you receive?

At the end of this process, both you and your client will immediately receive a 'report card' on how well positioned or not, we believe your client to be. The professionally presented report includes useful explanations, general commentary and suggested actions for you and your client to consider.

### Why go to the effort?

Your clients will have worked hard over many years to accumulate their estate. Doesn't it make sense for them to begin thinking and planning about how they want it handled when they're unable to look after it? If they don't take control, it will depend on others (and maybe even a court) to distribute their estate on their behalf. Most importantly, **the Estate Planner will give your client peace of mind that everything has been thought of and if something happens, the people who are relying on them, will be properly looked after.**



## BENCHMARKING YOUR BUSINESS AGAINST PEERS & COMPETITORS

### BenchMarker

Through our work with Australian practices, we gather significant amounts of data about their businesses. We learn about staffing and client numbers, activity levels, major areas of expense, revenue, profitability and so on. We have consolidated this data to develop a **unique and dynamic dataset that delivers a snapshot of 'how practices are performing' at any point in time.**

#### What is the BenchMarker?

Our innovative BenchMarker tool enables you to access this dataset and compare your business against key metrics. **With a focus on the financials, it is factual and objective in nature. How does your business compare?**

The tool is accessible on any web-enabled device, twenty-four hours a day, seven days a week. It will take less than five minutes to complete, with your individual results available immediately. Of course, your details remain totally confidential.

#### What will you receive?

You will immediately receive comparative ratios that are relevant to your business. Further, **you will be able to input multiple 'what if' scenarios** during the course of the 12-month license period - without any restriction on usage.

#### Why go to the effort?

BenchMarking your business will enable you to ascertain current best practice and how your business compares to peers. **Armed with this objective, independent assessment, you will have the perfect platform to develop meaningful plans for your business going forward.**



**BUSINESS HEALTHCLUB - ORDER FORM (SPECIAL OFFER TO END DEC 2018)**

Please complete this form and return via email:

Simply save this form on your computer, complete your contact and payment details, then email it to [terry@businesshealth.com.au](mailto:terry@businesshealth.com.au), or fax 02 9660 8416.

**Product Details:** Ongoing subscription includes;

- |  |                                       |
|--|---------------------------------------|
| ▪ 6 x consulting hours per year                | ▪ Unlimited use of the Estate Planner |
| ▪ Unlimited use of the business HealthCheck    | ▪ Unlimited use of the BenchMarker    |
| ▪ Unlimited use of the e-CATScan client survey | ▪ Ongoing communication program       |

**Practice Details:**

Your Name:	
Practice Name:	
Email Address:	
Address:	
	Suburb: <span style="float: right;">State:</span>
	Postcode: <span style="float: right;">Telephone:</span>

**Credit card details:**

Card Type:		Card No:
Expiry Date:		CVV: (last 3 digits on signature strip, 4 digits for Amex)
Name on Card:		
Amount:	<b>\$150 +gst per month (total = \$165.00) will be debited each month (You can cancel at any time.)</b>	
Signature:	(Signature not required if form sent via email)	

**Thank you for your registration.  
Information regarding your purchase will be emailed shortly.**