

# The Adviser **BOOTCAMP** NEW REVENUE STREAMS 2016

PRINCIPAL  
PARTNER



# AGENDA

## 8.30AM REGISTRATION AND NETWORKING

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## 9.00AM WELCOME

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## 9.10AM - 10.25AM DRIVING PRODUCTIVITY, MAXIMISING PROFIT AND POSITIONING FOR GROWTH IN A DYNAMIC MARKET ENVIRONMENT

**Speaker:** Stuart Donaldson, owner and founder of Banyan Co

A hands-on, interactive and engaging session that will challenge your thinking and leave you wanting to explore growth options. The session will include insights into setting financial targets, measuring and managing key sales drivers, and embarking on a growth strategy, and will provide real examples of what other highly successful brokerages are doing to produce outstanding performance.

- Many businesses overlook the power of managing and measuring productivity drivers to maximise profitability. Learn how to effectively use resources to produce sales, using revenue and productivity modelling.
  - Positioning for growth: Determine how to assess the benefits, opportunities and alternatives when embarking on a change to your business strategy, including diversifying, outsourcing and creating new revenue channels.
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## 10.25AM - 10.55AM SMALL BUSINESS - THE BIGGER PICTURE

An expert Panel will give advice on how to tap into the SME market

- What you need to know in a changing lending landscape
  - How big is the SME opportunity
  - How to identify an SME client
  - Bullet proof your business for future changes
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## 10.55AM - 11.40AM MORNING TEA AND NETWORKING

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## 11.40AM - 12.40PM DISCOVERING CLUES TO NEW BUSINESS OPPORTUNITIES FROM WITHIN YOUR SME CLIENTS' FINANCIAL STATEMENTS

**Speaker:** Stuart Donaldson, owner and founder of Banyan Co

The story of a business is found in its financial statements. Learn how to leverage your clients' financial statements for new business opportunities by understanding what to look for, how to uncover the clues and how to position this knowledge to add value to your SME client relationships.

- Meeting SME needs: Identifying the opportunities is the starting point. We will explore how to leverage your database, ring-fence your clients, maintain control and expand your revenue sources.
  - Not a numbers person? No problem, you will learn how to overcome this and transform your approach to reviewing and assessing financial statements.
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## 12.40PM - 1.10PM LOAN WRITER OR LEAD GENERATOR?

- Every loan presents an opportunity
  - Best practice to diversification strategy - what actually works
  - How to increase revenue without wasting time.
  - Create stickier clients.
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## 1.10PM - 1.55PM LUNCH AND NETWORKING

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## 1.55PM - 2.15PM DEBTOR FINANCE - INTRODUCTORY WORKSHOP

- Why are Australian businesses so bad at paying their invoices?
  - Understanding your clients' needs and the challenges of rapid business growth
  - Introduction to the Debtor Finance solution
  - How to spot a Debtor Finance opportunity - what to look for and what to avoid
  - Debtor Finance - Developing a lasting passive revenue stream for your business
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## 2.15PM - 3.30PM LEVERAGE YOUR LINKEDIN PROFILE FOR BUSINESS GROWTH AND LEAD GENERATION

**Speaker:** Jane Anderson, personal branding expert

- Learn how turn LinkedIn into a lead-generating machine.
  - Position yourself as a trusted adviser for SMEs.
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## 3.30PM - 3.45PM AFTERNOON TEA AND NETWORKING

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## 3.45PM - 5.00PM SPEED DATING - PRODUCT FOCUS

Your chance to hear how to market and present leading products. This series of short, sharp, interactive sessions will maximise your knowledge in the minimum time.

- Direct insights from product experts.
  - Interactive and engaging content.
  - Learn first-hand how to kick-start new revenue streams.
  - Discuss and share thoughts with peers.
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## 5.00PM NETWORKING DRINKS

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