

Your playbook template – sample responses

Welcome to our playbook table, designed to get you thinking about how to grow your commercial finance offering and how best to position what you can offer to your SME clients. Please read through the playbook and add your own flavour to it on the back of what you know about your clients, their needs and how you know you can help.

Where to fish	<p>Where are you most likely to find your clients? Online? Referral networks? Social? Word of mouth?</p> <p>My own FLEX database, referral partners (accountants, financial planners who understand a client's position and strategy), social media, presentations (i.e. purchasing property through your SMSF, Managing your ATO obligations, Business expansion strategies etc).</p>
Your audience	<p>What sorts of industries do your clients work for or in? What are their responsibilities?</p> <p>Your existing clients (starting the conversation with a simple home loan health check for your SMEs and then an observation about their business and how you can help, your networks online, your existing clients who have SME friends and family, social media.</p>
Their goals	<p>What are their business goals? How can your business finance offering help them achieve them? What are their challenges and pain points, how can you help address them?</p> <p>Ask them the question and look at your clients' overdraft activity for pointers, business growth, purchase of assets, alleviate cashflow issues, fund stock purchases, cover tax payments, to cover increasing sales etc.</p>
Their problem	<p>What gap you're filling with in the market, and the opportunity.</p> <p>Finding the right finance and knowing it's the best solution for them. Is it no security given declining home ownership in younger segments? Understand their problems today and anticipate their problems tomorrow? Are they are start-up? Is the loan process just all too hard and too much of an admin burden? Is it just too hard to think about switching from what they already have?</p>
Your solution	<p>Concise, clear, and why it makes sense right now, how we're different, why you're the right team.</p> <p>One stop shop, choice across leading lenders, peace of mind you've matched the right type of finance with your particular need, and we make it easy and as quick as possible.</p>
Competitive advantages	<p>Your product in action (proof points too on why your clients love it), show examples of how it works, the underlying magic of the technology and your process.</p> <p>Your lender networks you can lean on, talk them through lenders' risk appetites, tips on getting it right first time and tips on how to expedite etc.</p>
Asking for Action	<p>Are they more predisposed to a particular solution or product in your arsenal?</p> <p>What is important to you? What are your business plans for the next 12 months? How are you going to fund them? Let's have a quick 15 min chat, leave them in no doubt you are their go to for all things finance, their advocate and their sounding board – you are their go to for and discussion that is finance related and their first port of call.</p>

Your playbook template – further ideas, solutions and responses you may have

Welcome to our playbook table, designed to get you thinking about how to grow your commercial finance offering and how best to position what you can offer to your SME clients. Please read through the playbook and add your own flavour to it on the back of what you know about your clients, their needs and how you know you can help.

Where to fish

Your audience

Their goals

Their problem

Your solution

**Competitive
advantages**

Asking for Action

Contact Us

www.afgonline.com.au

Level 4, 100 Havelock Street
West Perth WA 6005

T 08 9420 7888

Australian Finance Group Ltd
Australian Credit Licence 389087
ACN 066 385 822