



client
acquisition
retention
engagement

financematters MARKETING PROGRAM

Industries: finance, accounting, financial
planning, property investment, conveyancing



our marketing philosophy

We believe that a single marketing approach is no longer an effective and long term strategy for any business wanting to retain and continue business growth. Our research and results show that a planned, multi-layered communication strategy is the best form of marketing to, and engaging with, your clients for long term business success.

your **client**matters' marketing strategies, resources and programs are designed to assist with client acquisition, retention and most importantly client engagement.

finance matters program

As time passes our lives change and evolve. We experience different events. These events can trigger different opportunities.

The finance matters marketing program is designed to target these events to trigger a response through timely delivered marketing that will generate enquiries from new and existing clients.

Your clients are unique. They will respond and engage in different ways. Your multi-layered program will encompass different mediums allowing you to communicate with your clients via their preferred method of communication whether it be print, electronic, internet/website, sms or social media.

You will find this combined strategy delivers excellent results.

The finance matters marketing program is designed to assist you with client:

✓ **a**cquisition,
✓ **r**etention, and
✓ **e**ngagement.

Your marketing program delivers a multi-layered strategy implemented through a range of products and services. These services target the different interactions you have with your clients and prospects, helping you not only retain your clients but also **generating a pipeline of new leads.**

magazine

a r e
✓ ✓ ✓

Obtain a client and keep them for life. Stay in touch with your clients and prospects every quarter using this educational and professional resource.

We do all the work for you including mailing or emailing it directly to your clients.

print magazine

The premium quality magazine comes with a range of branding options allowing you to:

- write your own personalised letter, or
- provide your own magazine name and front cover images.

The magazine will enhance your brand recognition and reputation. It can be used as a client retention strategy and we will work with you to teach you how to leverage the magazine as a client acquisition tool.

electronic magazine

The highly acclaimed and very successful paper based magazine is also available in an electronic version. A customisable email message is delivered to your clients each quarter and links to an online branded flip-magazine.

The online magazine provides direct links for your clients to enter the competition.

RBA announcement and monthly marketing campaigns

a r e
✓ ✓ ✓

Who has the time to sit down and create a targeted marketing piece every month designed to encourage your clients to pick up the phone and call you?

We do! Every month you will receive a professionally designed marketing piece with the RBA announcement and a separate call to action. We can even send it directly to your clients on your behalf if you choose.

This will ensure your clients think of you when they next want to do business.

engagement

retention

acquisition

Providing a range of professional lead generation strategies from new and existing clients as well as your referral partners.

With the right communication plan and marketing strategies we help you turn your once off transactions into clients for life.

Education, prompting client initiated contact, is the key to your marketing program and your successful engagement strategy.

finance matters program

client competitions



The competition is a proven lead generator in its own right. You can use the competition to thank your clients for doing business with you and as an incentive to refer business to you. We have many strategies to suit your business and personality.

The finance matters marketing program includes two competitions annually, valued up to \$10,000 each. The competition marketing pack includes:

- brandable posters,
- entry tickets,
- web and email graphics,
- dedicated branded competition entry website, and
- online entry forms to include in your own website.

marketing coaching



We provide you with your very own marketing coach to **work in partnership with you on your business** marketing plan. We'll help you to implement our proven marketing systems, try new marketing ideas and most importantly keep you motivated and accountable to your marketing and business goals.

Your marketing coach will contact you on a regular basis to ensure that you are:

- using the program to its capacity,
- growing your database, and
- generating new leads.

marketing workshops



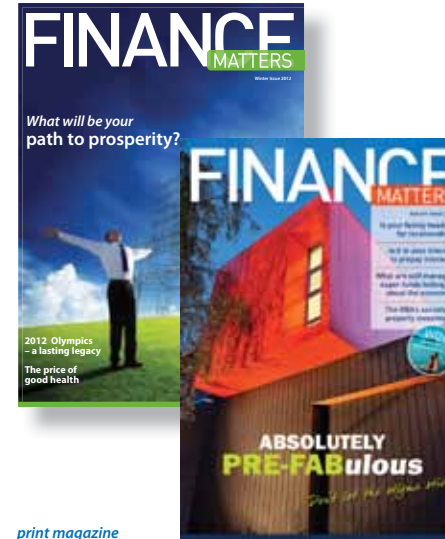
Our workshops will educate you on the latest tips, research and current marketing initiatives to help you with your business. These highly motivating workshops will teach you how to improve your business systems, develop peer networks and increase referrals with effective marketing techniques, whilst earning MFAA and FBAA CPD hours!

local area marketing



Raise your profile and improve brand awareness in your suburb and local community. Use your extra magazines and the competition for external marketing. Hand magazines to all new prospects and ask friends and family to pass them on. Leave magazines and competition promotional material with local businesses and your strategic alliances - anyone who has a waiting room. All training and support provided.

Depending on your needs you may choose to only use one or two of our products and services. We can tailor a package to suit you.



print magazine



electronic magazine



Let's have a look at this post that's months to see why banks have been such a huge topic for consumers. Many of the things that have led to consumers feeling frustrated are:

- Cash rate drops (Dec 2011) - most banks don't cut all deposit interest rates.
- Fixed rate loans on hold - banks increase rates infrequently.
- A mortgage cut - different cash rate changes - cash rates on hold.
- A fall about the best time to buy your home as rates might start to increase again.
- Banks' credit on hold.
- Banks complain about the high level of costs of lending.
- Fixed interest rates start to drop again.

How confusing is the finance market right now?

We understand that our clients are confused about the difficult when you are working through. When you have different arrangements every single month, you can't understand how they are being calculated, and you are missing things at all. The uncertainty and mess is making you frustrated.

When banks and lending institutions create deals and conditions in the middle of our consumers we find that they have been taken advantage of by the Reserve Bank and choose not to take an official rate rate most people worry that they are being ripped off.

That is not always the case.

So what is a fair interest rate?

This is what banks will have most to do with them on advertised rates and comparison rates.

What is a comparison rate?

A comparison rate is a rate that allows you to compare the true cost of a bank. It is a rate which includes both the interest rate and the fees and charges relating to a loan, reduced to a single percentage figure.

For example, a bank's advertised interest rate may be 5.00%, and its comparison rate 6.25%.

The comparison interest rate takes into account the actual cost of the money you borrow including application fees, valuation fees, lender's legal costs, monthly or annual account keeping fees.

Using a comparison rate

Because it is difficult to compare home loans with different interest rates and fees, credit providers have now they allow able to interest rate or weekly mortgage amount.

This is calculated by adding the interest rate to the actual rate and charges on the loan. Using a comparison rate yourself you will make sure the bank you are comparing are to the same interest and terms.

monthly marketing campaign

"YCM is a full marketing concept with training, support and implementation of strategies designed to grow my business. I didn't tell my client I was at a workshop. I told them I was at a meeting with my marketing company."
Tim QLD

magazine customised cover

competition

additional services

websites

We can build you a cost effective, professional website in days - including extensive content developed especially for the finance industry.

All you need to do is review our menu of options, portfolio of site designs and calculators to decide the type of website that will suit your needs. We will then create the site with your branding and customised layout, our content and any additional content you provide.

The design is individually created for you so you can stand apart from other businesses. We also provide a content management system to make it easy for you to make changes yourself as your business evolves and grows.

social media

Social media and facebook in particular are becoming as important as a website. We have packages to help you start a facebook business page in just days.

Through the use of the dedicated facebook competition entry forms, we can help **generate followers and increase the reach of your business exponentially.**

Not sure how it all works? Our marketing coach can work with you to develop a tailored facebook marketing communication plan.



"Just wanted to email and say a big THANK YOU to everyone at YCM. We've launched timeline and I am extremely happy with it. Today alone I got 9 new leads and yesterday 4 ... facebook is starting to really work well now that I have the numbers."

Andrew NSW

brochures and fact sheets

We have brandable booklets, factsheets and checklists to present a professional image for your business. We have done all the work. All you need to do is provide your logo and contact information and we will personalise them for you. You will receive a print ready file as well as a version suitable to email directly to your clients.

We can create an online flip book for your website to attract new clients or educate existing ones. We can even arrange the printing for you. You only pay for the booklet once, then you can print as many as you like, whenever you like.



the home buying essentials guide

Unless you deal with finance and property on a regular basis, home buying can be an overwhelming experience. We have developed this booklet to help your clients through the process. There are so many considerations when you are buying a property, and let's face it - most people don't do it very often!

the property investment guide

We understand that you want to help your clients invest in property. That is why we have developed a professional guide for you to brand as your own. It covers all you need to know when buying and financing an investment property. A must have for serious finance businesses.

factsheets and checklists

Clients appreciate any extra services you provide to help them on the path to owning a new property. You can now give them your own branded one page factsheets and checklists. We have a range of these available for you to invest in, including loan documentation checklist, budget organiser, finance terms simplified and more. Visit our website to see our comprehensive range.

"YCM is by far the best finance marketing system in Australia."

Michael QLD

“Your Client Matters is one of the biggest discoveries in my entire business lifetime. From the first contact it was clear that they were committed to continuous marketing support of our business. Various marketing initiatives, business ideas, attention to industry changes and sensitivity to our needs are just a few features of YCM services. It was never about just selling their product or service, but rather going the extra 100 miles to maximise our benefits from their products.”

Anton VIC

“We have been using the finance matters magazine for almost 3 years. We love the professional look and more so it’s posted out for us. Definitely makes business life easy. We always receive extra issues for our office, along with the monthly marketing tips. There are always simple activities that can be implemented to get results. YCM is more than a magazine. You have professional support with marketing and workshops with like minded associates leaving you feeling inspired and motivated to better your business.”

Boris QLD

“YCM has allowed our business to complete the ‘polish’ on our communication/touch points with our client base. Professional, well informed staff and products that allow peace of mind.”

Lucy VIC

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