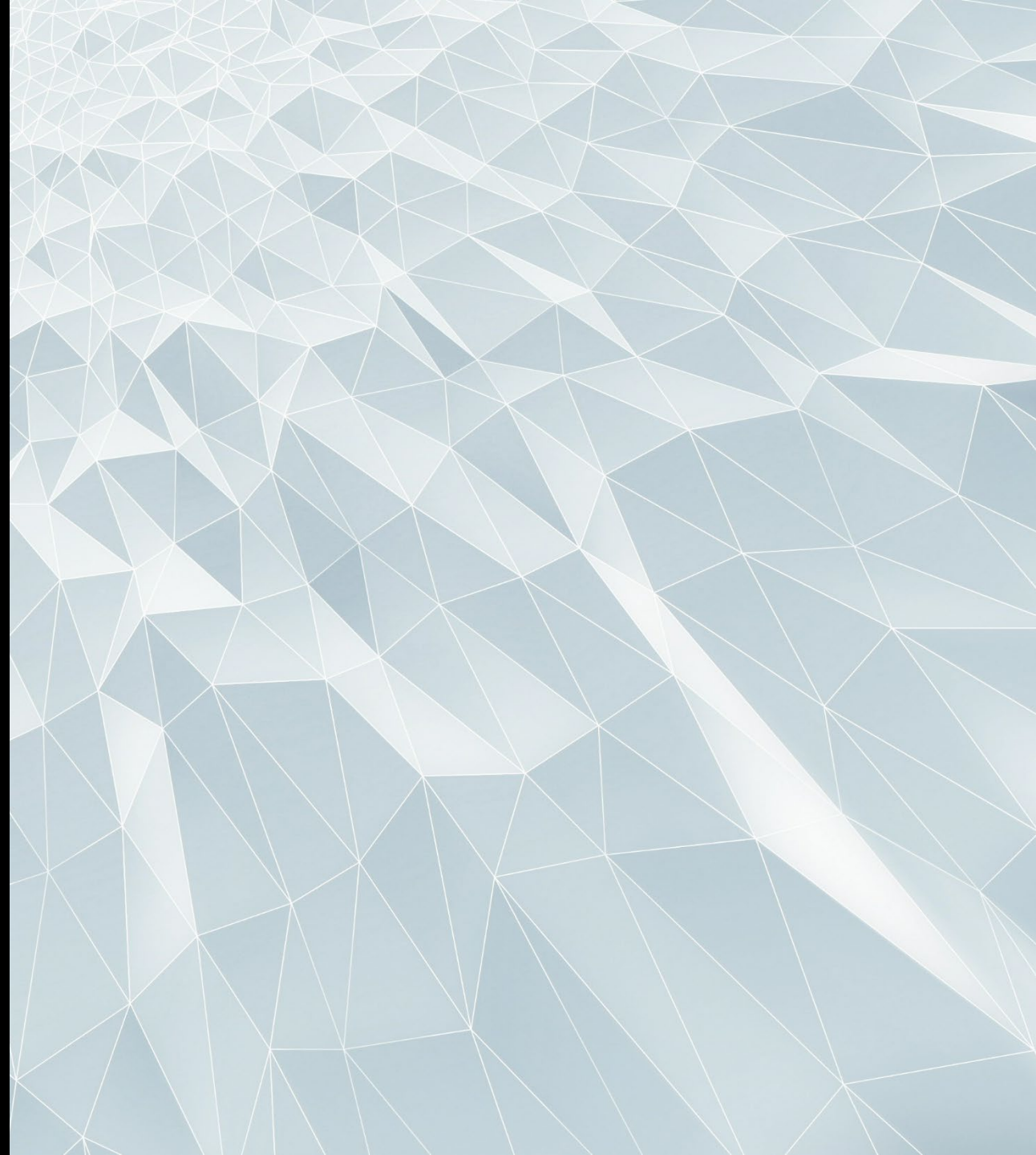


Hunting for organic growth

Centrepont Alliance

4th February 2025



Poll Question

What's your main growth challenge right now?

1. Attracting new clients
2. Capacity to absorb new clients

Important information

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Learning outcomes

A copy of the slides will be available after the session

01

Learn real, practical organic growth tips from leading advice businesses and practitioners



02

Hear how advice professionals ranging from a day-one Founder to a CEO successfully grow organically



03

Hear case studies covering relationship building, communication, networking, lead generation, psychology and culture



Agenda



01.

The organic
growth map



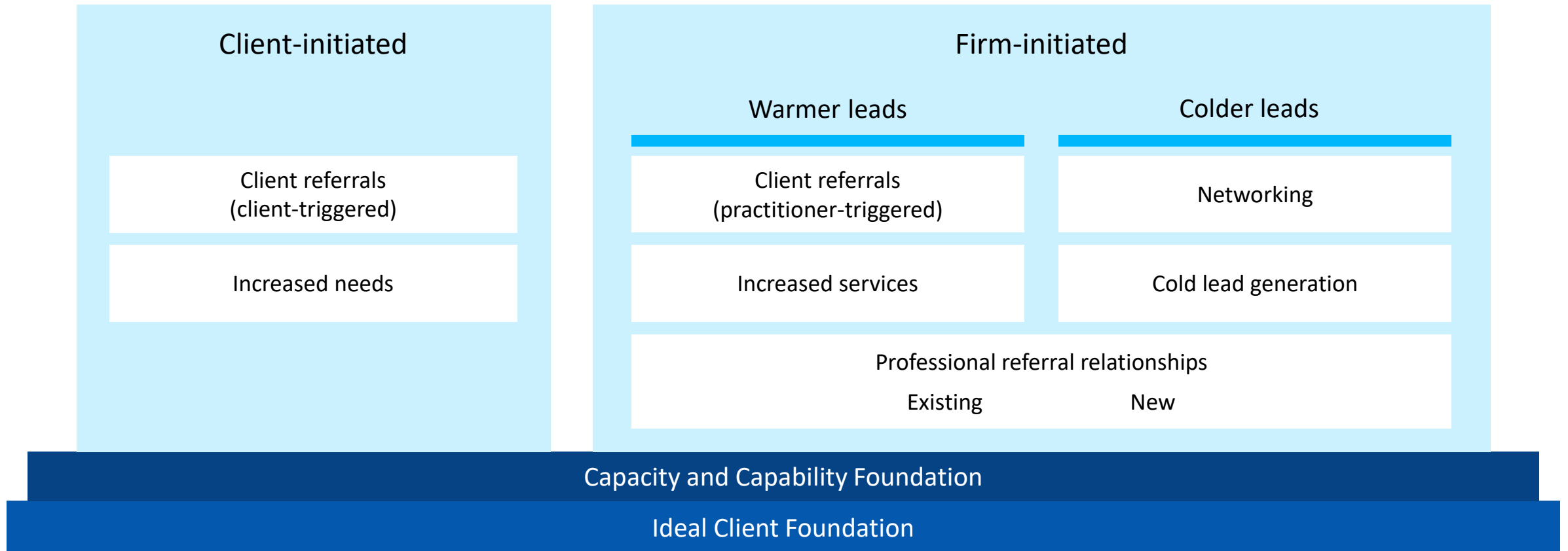
02.

From Founder
to CEO:

Hunting for organic growth

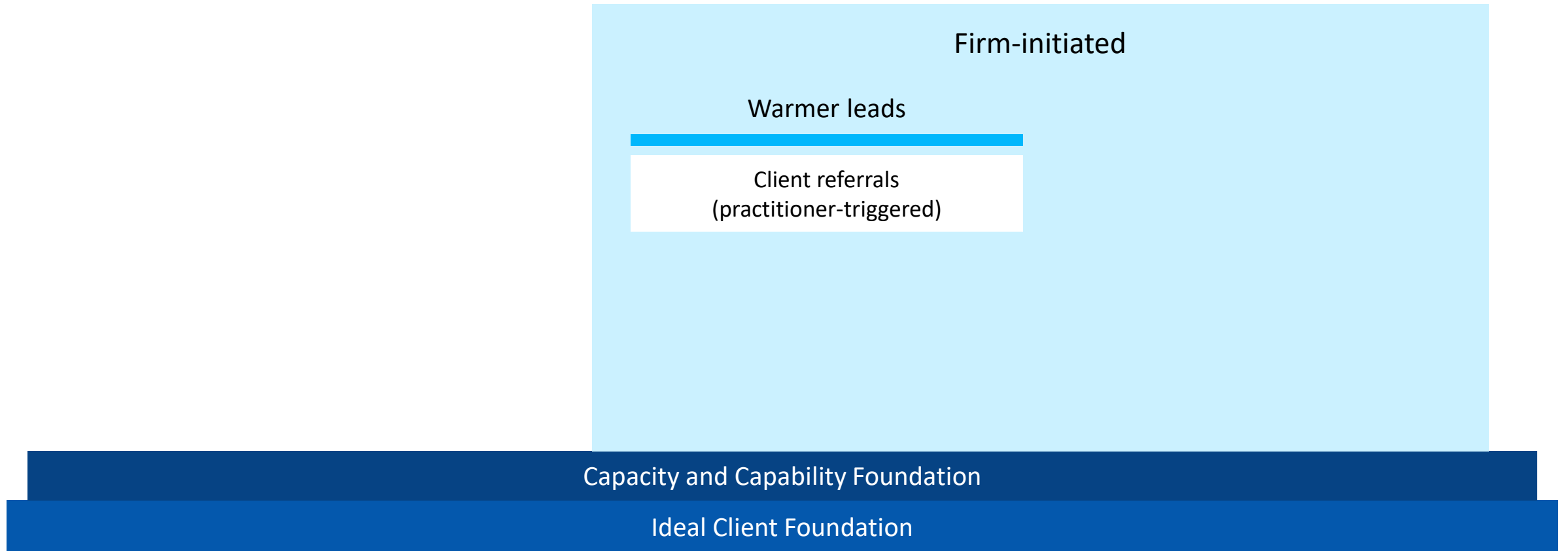
Organic growth sources

Sustainably uplifting organic growth requires two critical foundational elements and comes from three sources



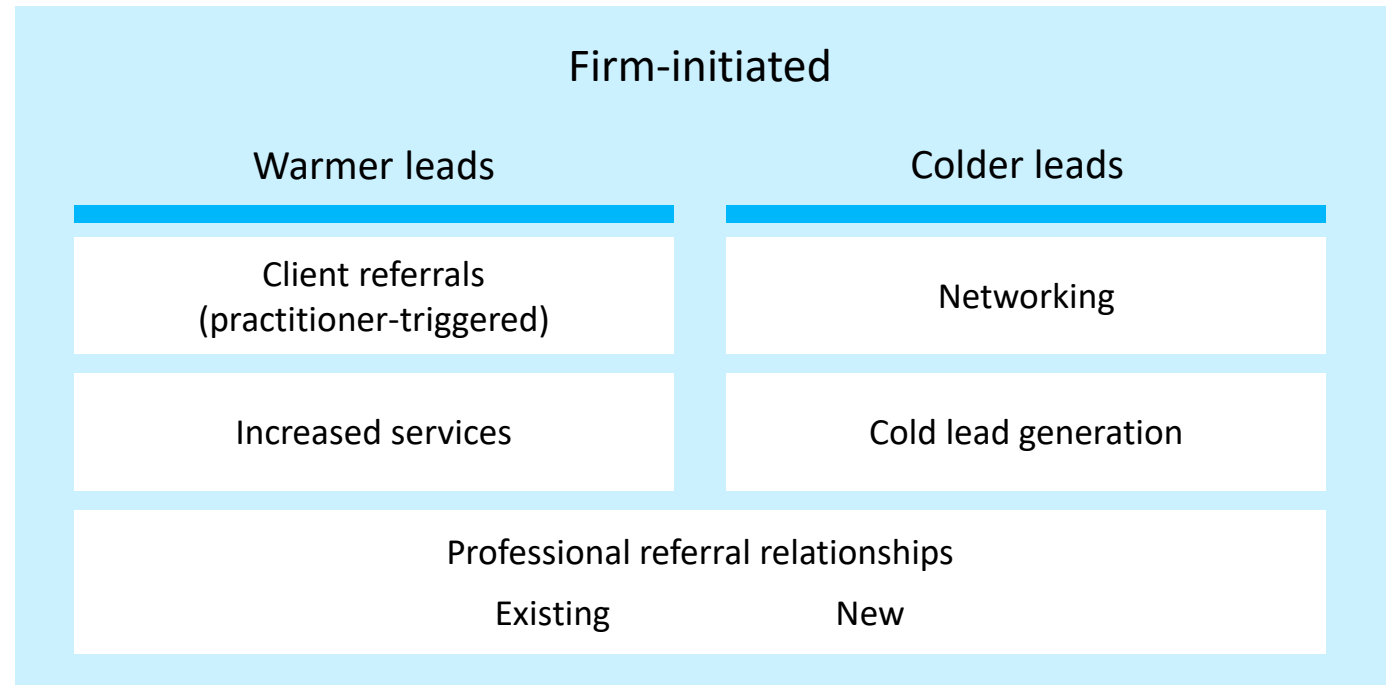
Primary Drivers of Capacity and Growth

Our last session in November focused on the Ideal Client, Capacity and Client Referrals



Hunting for Organic Growth

Today we will broaden the growth conversation to include a wider range of sources, that are sometimes referred to as “Hunting”



Ideal Client Foundation

Sources of today's information

Over 13 years of consultation and collaboration with leading advice firms



150+ firms
\$1m-\$100m
13 years



2 MPs
~\$2m each
\$20-\$40m firm



High growth "Hunters"



2 leaders
with 25% growth



What can we learn from the experiences of these high growth businesses?

Nathan's Story

Drive



Personality

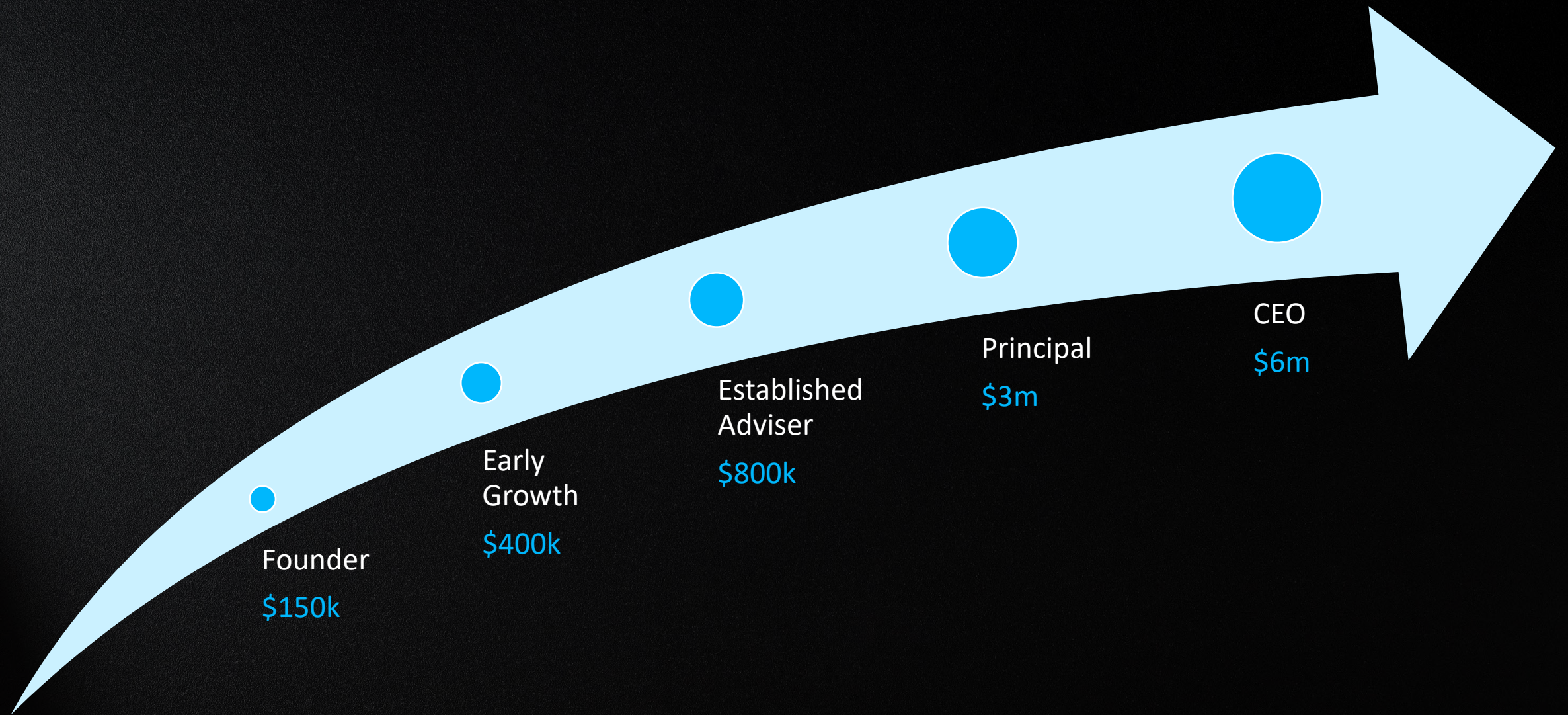


Skill



Nathan's story will encompass the insights we've gained from multiple advisers and businesses

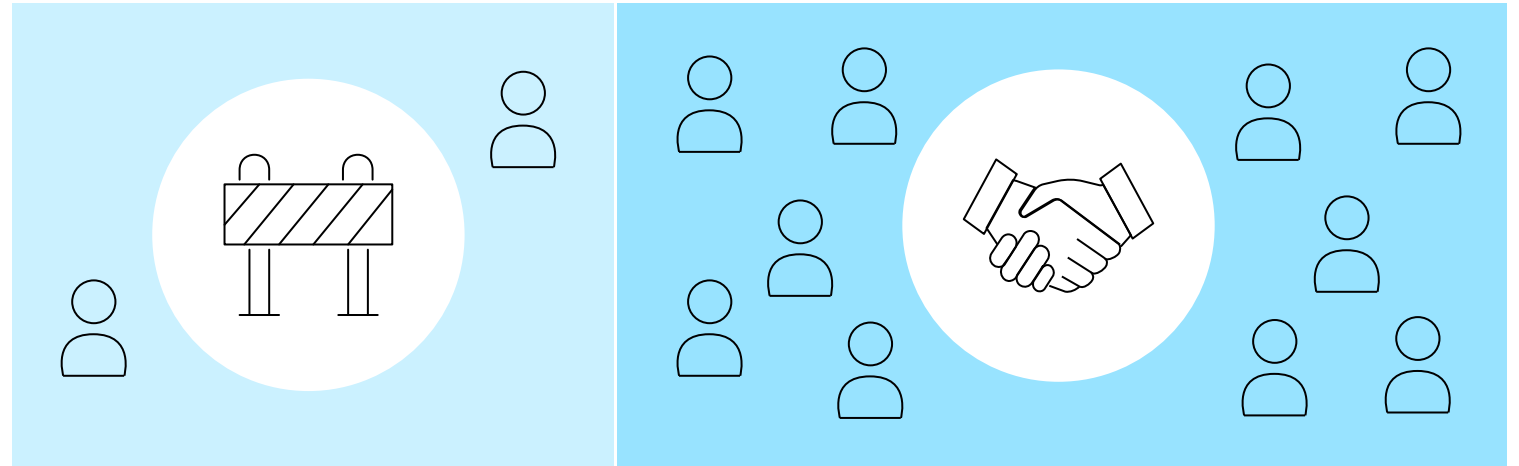
Nathan's Trajectory



Founder

\$150k

Lead generation




Communication and relationship building

$$\text{Trustworthiness} = \frac{\text{Intimacy} + \text{Reliability} + \text{Credibility}}{\text{Self-orientation}}$$

Source: The Trust Equation, from "The Trusted Advisor", David Maister.

Why didn't advisers land affluent clients?

Prospects didn't understand
guidance  **4%**

Prospects didn't
feel understood  **86%**

Founder



Initiatives to consider

Prioritise warm over cold lead generation

Boost your relationship-building capability using The Trust Equation

Don't rely too much on credibility;
strengthen intimacy and client-orientation



Resources

Ziglar on Selling by Zig Ziglar

The Trust Equation or “The Trusted Advisor” by David Maister

Action Plan Marketing by Robert Middleton.

Free self assessment: <https://actionplan.club/free-stuff/scorecard>

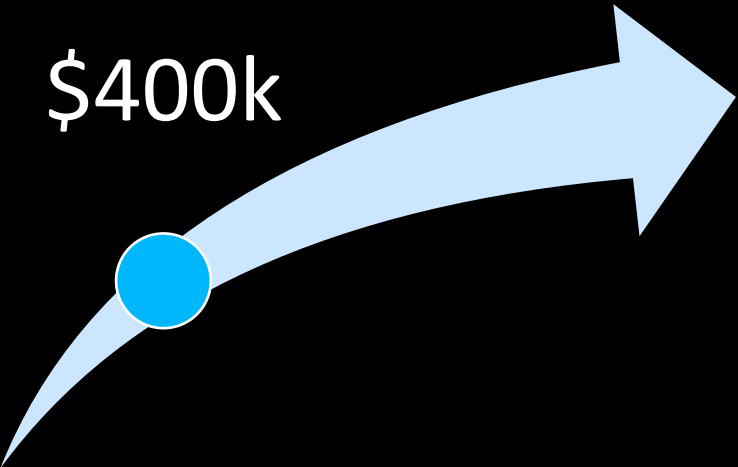
Quiz Question

What is the most powerful driver in building trust?

A: Low self-orientation

$$\text{Trustworthiness} = \frac{\text{Intimacy} + \text{Reliability} + \text{Credibility}}{\text{Self-orientation}}$$

Early growth



Networking

Frequency



Connectivity



Adding value



Pipeline management

Lead In	Contact Made	Needs Defined	Proposal Made	Negotiations Started
<p>👤 \$91,792.17 · 46 deals</p> <div><div>11th Hour deal</div><div>11th Hour, Marthuzila J...</div><div>👤 \$10</div></div> <div><div>123 Company deal</div><div>The Great Cater, Porfry ...</div><div>👤 <1d \$0</div></div> <div><div>2K Games deal</div><div>2K Games, Nicholas Co...</div><div>👤</div></div>	<p>👤 \$1,050,200.62 · 57 deals</p> <div><div>47 Deal</div><div>👤 \$0</div></div> <div><div>Bass Industries deal (copy)</div><div>Bass Industries</div><div>👤 \$33,000</div></div> <div><div>Cyberdyne Systems</div><div></div><div>👤</div></div>	<p>👤 \$137,238.48 · 18 deals</p> <div><div>ABC Inc deal</div><div>Purple Frames Ltd., Jus...</div><div>👤 \$33,000</div></div> <div><div>Birdwatching deal</div><div>Flood Inc.</div><div>👤 \$10</div></div> <div><div>Breandan's 2nd deal</div><div>Flood Inc.</div><div>👤</div></div>	<p>👤 \$35,881.90 · 13 deals</p> <div><div>Anna Hurst deal</div><div>Flying Whale Inc., Anna ...</div><div>👤 \$1,100</div></div> <div><div>Bad Wolf deal</div><div>Bad Wolf, Emil Baldwin</div><div>👤 \$33,000</div></div> <div><div>Breandan Test deal</div><div>Isaac Clark</div><div>👤</div></div>	<p>👤 \$84,285.67 · 11 deals</p> <div><div>Bicycle deal</div><div>Flood Inc.</div><div>👤 \$7,500</div></div> <div><div>Brandon Hurst deal</div><div>Brandon Hurst</div><div>👤 \$5,000</div></div> <div><div>Chelsea Tucker deal</div><div>Chelsea Tucker</div><div>👤</div></div>

Early Growth



Initiatives to consider

Frequency, connectivity and value drive network strength; prioritise and diarise these activities

Connect contacts with each other

Start a sales pipeline in a system such as Pipedrive, or a spreadsheet



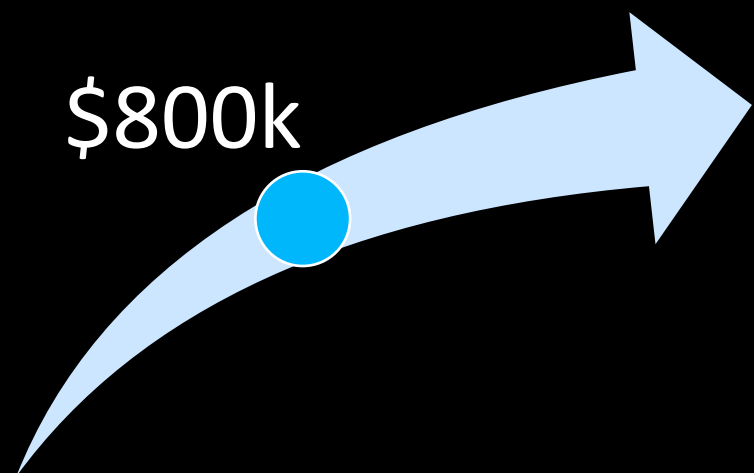
Resources

The Go-giver by Bob Burg

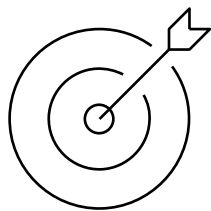
Million dollar consulting by Alan Weiss

Professional Services Marketing
by Mike Schultz and John Doerr

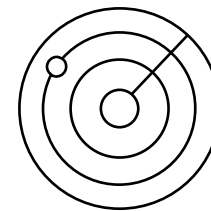
Established adviser



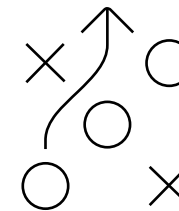
Ideal client clarity



Bullseye



Secondary



Non-client

Specialisation

Identifies potential
specialisation

Involves
network

Immerses into
clients' world

Shapes offering

Established Adviser



Initiatives to consider

Refine your ideal client using tools such as the Bullseye ideal client tool

Identify potential specialisations for you to expand based on your strengths or your clients

Understand your specialised clients better than they understand themselves by immersing yourself in their world



Resources

Primary drivers of capacity and growth, Macquarie

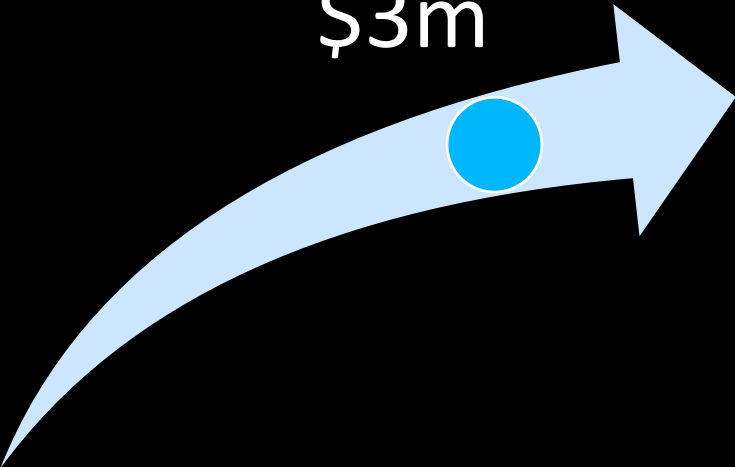
Poll Question

Are great salespeople born or made?

1. Born
2. Made

Principal

\$3m



“I could hunt, so they can too”



Sales KPI #1
Sales KPI #2
Sales KPI #3

Playing to people’s Strengths

Drive



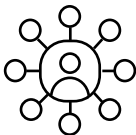
Understand intrinsic,
influence extrinsic

Personality



Assess and accentuate

Skill



Assess and
develop

Principal



Initiatives to consider

Map your team members' will and skill to win new business and develop their skills accordingly

Tailor incentives to drive growth behaviours in ways that align to their will and skill



Resources

7 traits of successful salespeople, Are top salespeople born or made?
by Steve W Martin

The Impact of Big Five Personality Traits on Salespeople's Performance
Yakasai and Jan

Personality characteristics that predict effective performance of salespeople
William Verbeke

CEO

\$6m

Culture and Data



Culture

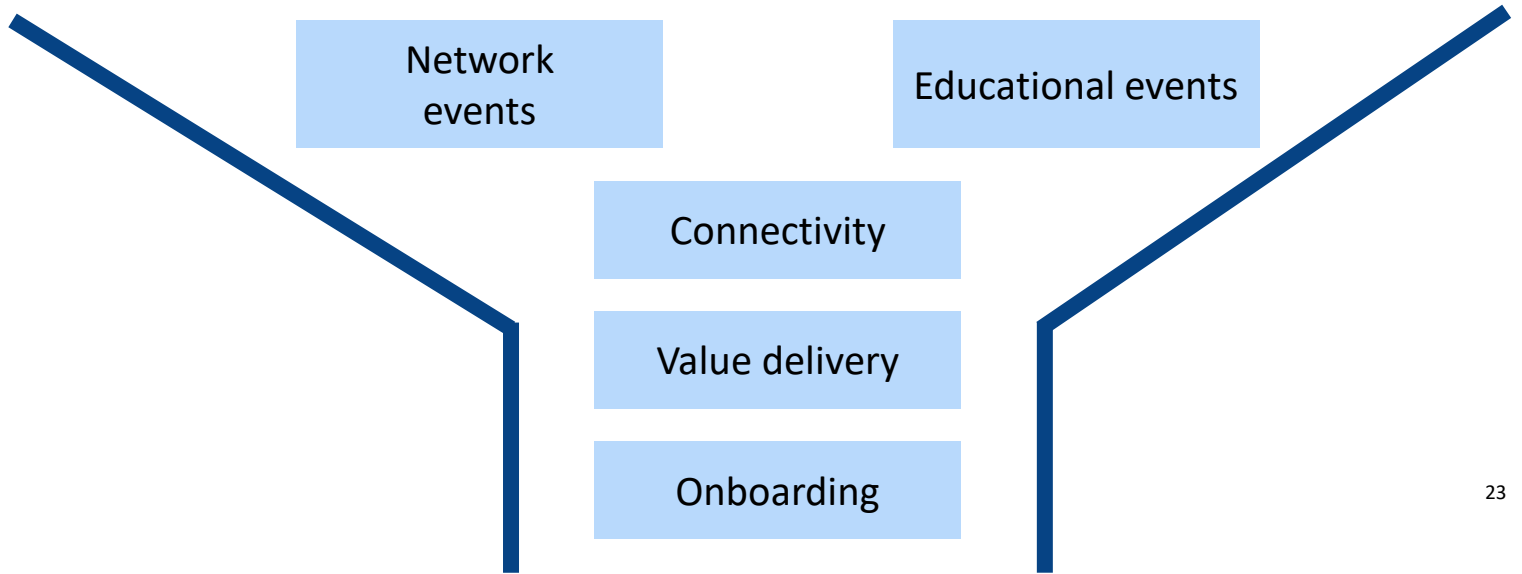
- Leading by example
- Enablement
- Development
- Psychological safety



Data

- White space
- Demographics
- Referrals
- Adviser engagement

Engagement Funnels



CEO



Initiatives to consider

Set the culture for growth by leading by example, investing in people's development, and communicating your direction and the benefits to all

Use data to identify growth opportunities especially if you deliver multiple service lines

Create systems that reduce reliance on individuals' talents to win new clients



Resources

Managing the Professional Services Firm
by David Maister

Scaling Up by Verne Harnish

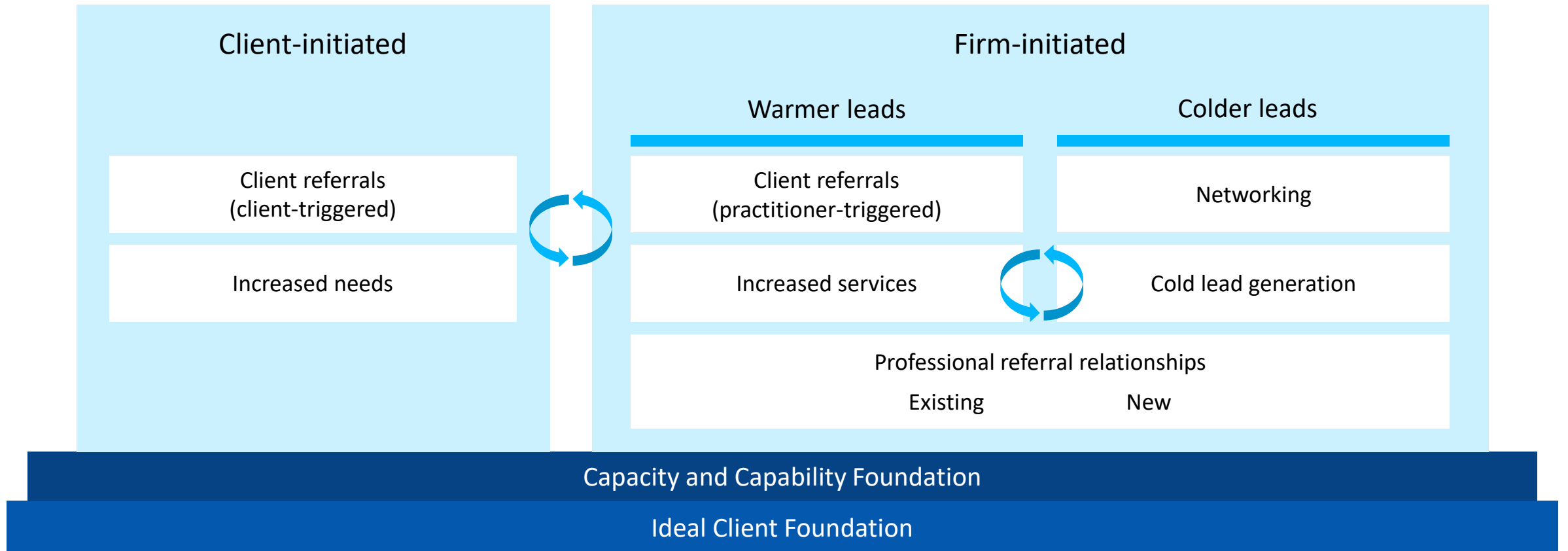
Quiz Question

In relation to warm lead generation and networking, what indicator did Nathan say is directly correlated to growth outcomes?

A: Face time

Hunting for organic growth

For the mature business, effective hunting includes the integration between these various elements



Thank You

