

Service Offering



The next practice in business solutions



# Introducing iQ:eQ

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## Why iQ:eQ? »

- ▶ The team at iQ:eQ bring many years of training and financial services experience to your business and your clients.

We recognise the importance of an effective training and ongoing support program to keep your clients happy and fully supportive of your business.

We offer various service packages that provide you with choice and flexibility in relation to the services we offer.

We are keen to explore and develop an ongoing relationship/partnership with you.

We are professional and highly motivated individuals with a strong desire to succeed.

## What's in a Name? »

- ▶ The name iQ:eQ is derived from extensive observation of many industries and corporations with particular focus paid to the financial planning industry. For over several years we have asked what is it that distinguishes one financial planner from another? What qualities make a person a leading performer in this industry?

The answer is consistent. It is a balanced combination of technical skills (IQ – Intelligence Quotient) and non-technical skills (EQ – Emotional Quotient), such as interpersonal, communications, rapport building, sales and presentation etc.

A good planner must possess a blend of skills to be the best in their field. Not only do they require sound technical knowledge to devise the financial planning strategy, but they also require excellent communication and sales skills to sell the idea to the client. What iQ:eQ has come to realise is the interesting fact that the combination of these skills is not a 50/50 split but generally one of 80/20 (80% non-technical and 20% technical). This means that people tend to be more adept in one aspect of their role and not so strong in other areas.

We have also discovered that the training dollar is also generally split 80/20 (sometimes 90/10), with at least 80% of training resources allocated to technical training and 20% on the non-technical component. Our services and programs are geared towards providing the right balance between iQ:eQ to achieve the right result. We believe that this is the 'difference that makes the difference'.

## Benefits to your business »

- ▶ Some of the benefits to our clients may include:

- Reduced training costs
- Improved client experience
- Accessibility to a full training model
- Comprehensive training package that compliments current offering
- A strategic alliance that remains seamless to your clients
- Guaranteed return on investment

## Adding Value »

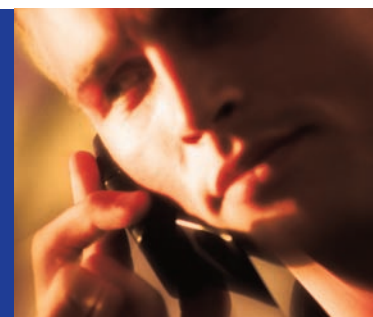
- ▶ iQ:eQ adds value in the way we approach training needs and in the design and delivering of our training solution.

Our Approach:

1. Understanding our client needs
2. Identifying the Gap
3. Developing the Action Plan
4. Closing the Gap
5. Maintaining the Desired Change



**The right balance of iQ:eQ. We believe that this is the difference that makes the difference.**



# 01 Training »

iQ:eQ is a specialist services provider, offering its talents specifically to the financial services industry. The iQ:eQ training service offer aims to support businesses in ensuring employee skill and behavioural competence, promoting quality service to clients. We are committed to providing the highest level of training that is customised to the specific needs of your business.

Our training professionals will work with you to determine skill and behaviour gaps within your business and then assist you in selecting the appropriate training activities and programs to support you in achieving peak performance and business growth.

This is achieved through:

- ▶ Consulting support to facilitate skill gap analysis.
- ▶ Consulting support to develop and implement a technical training strategy for individual businesses.
- ▶ Design and delivery of customised training packages to meet the specific needs of individual businesses.
- ▶ Strategic alliances with industry specific organisations and tertiary educational institutions to ensure a holistic training approach.

TRAINING SERVICE	OUTCOMES	KEY COMPONENTS
▶ <b>Software training</b>	Planners who: <ul style="list-style-type: none"> <li>• Efficiently generate Statements of Advice, client review and marketing correspondence using a financial planning tool, MS Excel &amp; Word</li> <li>• Utilise customised templates and reports for business use</li> </ul>	<ul style="list-style-type: none"> <li>• Financial planning software training</li> <li>• General PC training</li> <li>• Template customisation</li> </ul>
▶ <b>Leadership development training programs</b>	<ul style="list-style-type: none"> <li>• Financial Planners with the capability to effectively lead the business</li> </ul>	<ul style="list-style-type: none"> <li>• Business Planning and Strategic Leadership</li> <li>• Coaching &amp; Mentoring</li> <li>• Recruitment and Retention</li> <li>• Performance Planning</li> <li>• Emotional Intelligence for Inspirational Leadership</li> <li>• Change Leadership</li> <li>• Influencing and Negotiation Skills</li> <li>• Financial Management for Businesses</li> </ul>

# 02 Paraplanning »

We are committed to providing the highest level of paraplanning support, giving you the option of outsourcing your paraplanning needs to us, having our specialist paraplanning team customise your templates or having us recruit paraplanners to your business.

Our paraplanning professionals will work with you to determine your paraplanning needs and then assist you in selecting the appropriate services to support you in achieving peak performance and business growth.

This is achieved through:

- ▶ Consulting support to determine needs.
- ▶ Consulting support to develop and implement customised templates.
- ▶ Consulting support to recruit high calibre paraplanners to your business.
- ▶ Support in doing your paraplanning for you.

PARAPLANNING SERVICE	OUTCOMES	KEY COMPONENTS
▶ <b>Paraplanning Outsourcing</b>	<ul style="list-style-type: none"> <li>• Increased efficiency and accuracy of plans</li> </ul>	<ul style="list-style-type: none"> <li>• Plan preparation</li> <li>• Plan compliance checks and quality control</li> </ul>
▶ <b>Customisation of templates</b>	<ul style="list-style-type: none"> <li>• Plans that are tailored and suited to client needs</li> </ul>	<ul style="list-style-type: none"> <li>• Support service to customise templates</li> <li>• Training programs for the effective use of customised templates</li> </ul>
▶ <b>Recruitment of Paraplanners</b>	<ul style="list-style-type: none"> <li>• High calibre paraplanners recruited to the planner's business ensuring improved efficiency and business performance</li> </ul>	<ul style="list-style-type: none"> <li>• Recruitment consultancy service including job analysis, role definition, advertising, sourcing, screening, first interview, psychometric and technical testing and reference checking</li> <li>• Induction training program development and delivery for new paraplanners joining your business</li> </ul>

## 03 Talent Management »

The iQ:eQ talent management service offer aims to support financial planning businesses in the development and implementation of a succession plan that is supported by a talent development strategy. This will focus on attracting and retaining talent to ensure peak performance, business growth and market competitiveness.

This is achieved through:

- ▶ Consulting support to develop and implement a succession planning and talent development strategy.
- ▶ Consulting support to design and implement a compelling employee value proposition.
- ▶ Recruitment consultancy support.
- ▶ Performance coaching support.
- ▶ A suite of leadership development training programs and initiatives that are tailored to the needs of individual business, educating leaders to effectively coach and lead high potential employees and potential successors.

TALENT MANAGEMENT SERVICE	OUTCOMES	KEY COMPONENTS
▶ <b>Succession planning &amp; talent management strategy</b>	<ul style="list-style-type: none"> <li>• A succession plan and talent development strategy that is aligned with the overall business strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Consultancy support in the development of a succession plan and talent development strategy</li> </ul>
▶ <b>Recruitment and selection</b>	<ul style="list-style-type: none"> <li>• A clearly defined employee value proposition that attracts and retains top talent and promotes market competitiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Consulting support in the development of:                             <ul style="list-style-type: none"> <li>• Remuneration packages</li> <li>• Employee benefit schemes</li> <li>• Flexible employment programs and activities</li> <li>• Performance development systems</li> <li>• Organisational culture</li> </ul> </li> </ul>
▶ <b>Employee value proposition</b>	<ul style="list-style-type: none"> <li>• Successful recruitment of the right people for the right roles promoting peak performance and future business growth</li> </ul>	<ul style="list-style-type: none"> <li>• Recruitment Services - sourcing, screening, interviewing, testing &amp; reference checking</li> <li>• Graduate Recruitment - recruiting, motivating and developing high potential graduates</li> <li>• Consulting Support - support with managing in-house recruitment processes</li> </ul>
▶ <b>Accelerated development programs</b>	<ul style="list-style-type: none"> <li>• Empowered employees with the capability to effectively lead and grow the business. This is achieved through a suite of training programs and other developmental activities</li> </ul>	<ul style="list-style-type: none"> <li>• Coaching &amp; Mentoring</li> <li>• Business Planning and Strategic Leadership</li> <li>• Recruitment and Retention</li> <li>• Performance Planning</li> <li>• Emotional Intelligence</li> <li>• Change Leadership</li> <li>• Influencing and Negotiation Skills</li> </ul>

## 04 Practice Management »

The iQ:eQ practice management service offer aims to support businesses in ensuring planner competence in practice management, promoting quality service to clients. We provide consulting and training support to financial planners to assist them in winning new clients and effectively managing existing client relationships.

This is achieved through:

- ▶ Consulting support to facilitate skill gap analysis.
- ▶ Consulting support to develop and implement a practice management training strategy for individual businesses.
- ▶ Design and delivery of customised training packages to meet the specific needs of individual businesses.
- ▶ A suite of leadership development training programs and initiatives that are tailored to the needs of the business including 'Winning Relationships', 'Quality Advice', 'Powerful Presentations', 'Marketing' and 'Sales Management'.
- ▶ Assisting businesses design and develop financial planning tools and processes to support planners to more effectively gain new clients and efficiently and effectively manage client relationships.

PRACTICE MANAGEMENT	OUTCOMES	KEY COMPONENTS
▶ <b>Marketing and sales management</b>	<p>Planners that:</p> <ul style="list-style-type: none"> <li>• Effectively gain new clients and manage client relationships</li> <li>• Effectively manage sales strategies and budgets</li> <li>• Provide quality advice</li> </ul>	<ul style="list-style-type: none"> <li>• Consultancy support in developing and implementing effective sales and marketing strategies</li> <li>• A suite of training programs including 'Winning Relationships', 'Quality Advice', 'Powerful Presentations', 'Marketing' and 'Sales Management'</li> <li>• Performance coaching</li> </ul>
▶ <b>Business processes</b>	<ul style="list-style-type: none"> <li>• Business efficiency</li> <li>• Quality advice</li> <li>• Business growth and enhanced performance</li> </ul>	<ul style="list-style-type: none"> <li>• Consultancy support in the development and implementation of business processes and policies to ensure efficiency, quality advice and support business strategy and outcomes</li> <li>• Training programs to support business processes and policies</li> </ul>
▶ <b>Software solutions</b>	<ul style="list-style-type: none"> <li>• Business efficiency in generating Statements of Advice, client reviews and marketing correspondence using customised or tailor-made software systems</li> </ul>	<ul style="list-style-type: none"> <li>• Software consultancy support</li> <li>• Software enhancement and customisation of existing applications</li> <li>• Custom-made applications</li> <li>• Software training programs</li> </ul>



# The iQ:eQ offer at a glance

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## iQ:eQ Business Consulting Services



▶ iQ:eQ is a specialist services provider, offering its talents specifically to the financial services industry. We strive to support businesses in the development and implementation of their business strategy to assist them in achieving **peak performance, business growth and business succession**.

We offer various service packages that provide financial planning businesses with the choice and flexibility to select services that support their individual business needs.



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