

1. Mission Statement

Pearson Partners is committed to better communicate. We communicate a broad and complex range of markets, corporations, trusts, products and services. As part of our commitment to better communication, we have identified six priorities:

- ✚ **Transparency.** You can see how we are organized, who makes decisions, how they are made and how our decisions, the info, the role the taxation regulations require. Pearson Partners, Pearson Group and RMC to play.
- ✚ **Accessibility.** You can find out what decisions we have recommended, understand our strategy, tactics and implementation to best deal with your issues.
- ✚ **Less Duplication and Overlap.** You can help us identify and reduce areas where all accounting, tax and compliance duplicates or overlaps. i.e. Cashflow Manager, Quickbooks, MYOB and Excel Spreadsheet Management accounting systems internally need not be duplicated.
- ✚ **Business Impact.** We will better understand the impact of our recommendations on the people and entities we advise and will use more reliable and relevant information in making decisions.
- ✚ **Streamlining and Less Paperwork.** You can deal with us more efficiently, we will reduce paperwork, make better use of electronic communications and streamline and improve our processes.
- ✚ **Engagement Letter with Clients.** You and your family will be effectively and efficiently consulted so that we fully understand your views when we make advisory decisions

Our Service Charter that sets out what you can expect when you deal with us, how long it will take to do things and what we ask of you to help us serve you better.

A Guide to how we work that explains what we do, how we approach issues, how we consult with our clients and how we are accountable.

An organisational structure with key contacts.

2. Objective of the Marketing Plan

The objective of the Marketing Plan for the Pearson Partners Group is to:

- ✚ Initiate utilization of the extensions to the Clayfield Office and meeting rooms in March 2010
- ✚ Initiate Collins Street office entrance for Business Development Seminars in April 2010 in association with Growth Plus Financial Group
- ✚ Achieve replicatable SME events per quarter from April 2010

3. Business Overview

We provide

- Accounting
- Self Managed Superannuation structures
- Business advisory
- Agri business services
- Estate planning
- Business Structures (Companies, Trusts, Hybrid & Unit Trusts Child Maintenance Trusts, Testamentary Trusts, Transition to Retirement Allocated Pensions
- Business Improvement Processes
- Business Planning
- Strategic Planning
- Budgets & Cash Forecasts

Through

- Responsive and innovative approaches tailored to enhance our clients' Operations, Property and Financial entities with members of the Pearson Partners Group of Companies and Trusts:
- Pearson Partners Australia Pty Ltd
- Pearson Partners Unit Trust
- Pearson Group Unit Trust
- Pearson Management Trust
- Janette Pearson Services Trust
- Pearson Group Consulting Pty Ltd
- Managed Risk Underwriting Pty Ltd
- Collaborate Financial Solutions Pty Ltd
- Eighty20 Marketing Pty Ltd
- Risk Management Corporation Ltd

4. SWOT Analysis

<p>Strengths Unique savings to Clients on restructure, asset protection and taxation outcomes.</p>	<p>Weaknesses No representation in the regional area. Rely on referrals</p>
<p>Opportunities To enroll up to 1100 Clients.</p>	<p>Threats</p> <ul style="list-style-type: none"> Fully integrated Financial Planning, Accounting Firms

4.1 764 Sandgate Road & Collins Street Clayfield Integrated Offices

<p>Strengths</p> <ul style="list-style-type: none"> Boardroom and Presentation facility Web Based Support Accounting Practice 	<p>Weaknesses</p> <ul style="list-style-type: none"> Multiple Tenants Lack of Integrated referral and product offering
<p>Opportunities</p> <ul style="list-style-type: none"> Focus on Growth Plus Financial Group joint work, Risk Management and SMSF compliance 	<p>Threats</p> <ul style="list-style-type: none"> Not being able to grow the existing support to at least 400 members by 30/06/09

4.2 Pearson Partners

4.3 Pearson Group

Actions:

- Address potential office layout issues
- Repositioning
- Set-up meeting areas
- Improve filing system & retrieval
- Staff Training

5. Market Analysis

The Small Business SME Market has grown significantly over recent years in line with Baby boomer generation, business acquisition, capital gains SMSF and Succession Planning.

The Sandgate Road Office and Collins Street Marketing Facility will be utilized for a variety of events. These include:

- Tax & Corporate Advisers
- Meeting for New Business
- Boardroom for joint Marketing and referral new business
- Appointments – 11am, 1.30pm and 3.30pm

Professional Accounting Firms and the Compliance BAS and ASIC Reporting Marketplace is highly competitive. Pearson Partners is diversifying to other market segments.

5.1 Competition

5.2 Today's Market Trends

The Pearson Partners Team credits a large proportion of the company's success to having a clear, straightforward proposition and 'referenceable' customers. We also recommend the following principles for start up businesses.

- Focus on revenue! No company can survive without sufficient cash flow and steady profits. Watch your outlay and don't indulge in a fancy office or expensive toys- at least initially.
- Develop a detailed and focused business plan for the next one to five years, taking into account how you want the company to evolve over the long term. Put in place a strong, experienced management team.
- Recognise your niche and build on your Unique Selling Point (USP). Work with investors who: a) add value to your business; b) are large enough to get involved in further rounds of financing if required; and c) have good experience with similar technologies.
- Never forget the importance of outstanding customer service. It's harder to attract new customers than it is to garner repeat business.

6. Target analysis

Identifying the ideal Target Market is important as without it there is a danger that you try to be all things to all people and failing.

By having a Target Market in mind it allows you to focus on developing the correct product package for the customer and allows you to concentrate your resource most efficiently and effectively.

Category	Type of Service	Competitive Assessment (out of 10)		Key Issues to increased assessment
		Current	Potential	
Accounting	Tax Returns and SME Compliance	7	10	Best Practice information Data Base and Retrieval
Consulting	Restructure Corporate Division	8	10	
Risk Management	Growth Plus Financial Group	6	10	
Estate Planning	Wills & Estate Planning	7	10	Outsourcing Legal Documents

Actions:

- Focus on Appointments – 11am, 1.30pm & 3.30pm daily
- Focus on Target Market for Ideal Restructure
- Focus on Distribution Network clients for Pearson Group Consulting Pty Ltd
- Focus on Seminar selling to Collaborate Financial Solutions Strategic alliances

7. Reaching the Target Market

There are two methods of marketing to the Target Market:

Proactive (we contact them)

- SME's
- SMSF
- Corporate Advisory

Proactive methods include: Direct mail, Telemarketing and Targeted advertising

Reactive (they contact us)

- New Business start ups
- Rollovers to SMSF
- Estate Planning, Wills etc
- Agribusinesses
- Growth Plus Financial Group

Reactive methods include" General advertising, Internet, signage

7.1 Create a Prospect database

7.2 Create a Pearson Group Collaborate Database

7.3 Strategic Alliances

Strategic Alliances are important as they create a good source of referrals and can serve as a good reference. Care should be taken in developing strategic alliances as relationships such as these are best developed slowly and over a period of time and increased business is not immediate. There should be web links.