



Advisors: Grow your client base & improve your bottom line.

The innovative digital platform helping Advisors and Advisory Firms generate more business and improve their bottom line.



Your platform for business success



MyMalekso™

- ✓ Advisor Reports
- ✓ Monthly Business Advice Programs
- ✓ Monthly Seat Licence



The MyMalekso™ platform was designed for professional Advisors as a client engagement tool.

But it also has several built-in products which, as an Advisor, you can leverage to your benefit.

In this document we'll outline these products, providing you with guidance on how you could approach delivering these services.

The entire process is enabled through your MyMalekso™ dashboard.

1 Advisor Reports

MyMalekso™ features three business advice reports:

Business Accelerator, Mentoring for Business Owners and Sale Price Maximiser.

Bundled with your review and feedback, these reports provide cost-effective, powerful solutions for the business owner seeking professional business advice.

MyMalekso™ reports provide a great starting point for ongoing client engagements.

The following process is recommended in the provision of this service:



1. You and your client **AGREE** on your fee for service as per normal practice.
2. You log into your MyMalekso™ dashboard and **PURCHASE** the relevant advisor report product.
3. The business owner can either complete the deep-dive questionnaire by themselves or, you allocate time in your service fee to 'hold their hand' as they complete the **QUESTIONNAIRE**.
4. Once the questionnaire is complete, you **REVIEW** the business owner responses, noting areas for discussion with them.
5. Following this review, you would **CONSULT** with your business owner via the MyMalekso™ videoconferencing facility, 1:1, discussing their questionnaire, your findings, and both your questions and theirs.
6. Following this meeting, you insert specific, custom advice into the MyMalekso™ report questionnaire, hitting **SUBMIT** once finalised to instantly send the report to their dashboard.

In some instances, this completes the process. However, depending on what you have agreed with the business owner, you may meet again via videoconferencing to discuss their report and agree on their next steps.

The whole process takes 4-8 hours, depending on how involved you get with completion of the questionnaire, how long you choose to run your 1:1 meeting and whether you run any post report follow up meetings.

Regardless, using MyMalekso™, you save anywhere from 8-16 hours of work (plus travel). You will capture more consistent data, and minimise the chances of missing important information.

The MyMalekso™ fee is \$540 plus GST per Advisor Report. You simply purchase the report and charge whatever you want for the provision of this service, invoicing the business owner directly.



Recommended pricing:

\$1,220 plus GST per report (minimum).

Based on \$175 hourly rate (4 hours). Includes \$540 MyMalekso Advisor report fee.

2 Monthly Business Advice Programs

Following on from Advisor Reports, MyMalekso™ currently offers three business advice implementation programs for **Business Accelerator**, **Mentoring for Business Owners** and **Sale Price Maximiser**.

Using the information and recommendations from MyMalekso™ Advisor Reports, these advisory programs offer proven, effective solutions for the business owner — while providing the Advisor with a great source of additional income.

The following process is recommended in the provision of this service:



1. You and your client **AGREE** on your fee for service (based on your rates). Generally, a 2 hour advisory session per month (videoconference) plus an additional 1.5 hours for reporting, document reviews, miscellaneous emails and calls will suffice.
2. Log into your MyMalekso™ dashboard and **PURCHASE** a program licence for the business owner.
3. Commence the program as per the **AGREEMENT** with your client.
4. Each month, the business owner completes the monthly **QUESTIONNAIRE**. This updates the data in their dashboard (which you can access) and providing you with performance monitoring and discussion points for your advisory session with them.
5. Use MyMalekso™ to manage the **ENGAGEMENT** and keep your client on track. using the in-built task management function. Other features include the ability to add minutes, private and public notes, and the use of the document repository to store and share documents and more.



Recommended pricing:

\$757.50 plus GST per month (minimum).

Based on \$175 hourly rate (3.5 hours). Includes \$145 MyMalekso Advisor program fee.

The MyMalekso™ Business Advice Platform offers Advisors a way to expand their offering.

3 Monthly Seat Licence

Use the power of MyMalekso™ to manage ALL your client engagements. For clients not on a program, use the MyMalekso™ Seat Licence.

Simply head to your dashboard, purchase however many seat licences you require for a fee of \$10 + GST per month per licence, and then allocate them to your clients.

Once they accept your licence invitation, you will both be connected and visible to one another on your MyMalekso™ dashboard. You will then be able to use the seat functions to manage their engagement.

Some Advisors on-charge this fee to their client, building in the seat licence as part of the engagement fee. This is entirely up to you.

Replace MyMalekso™ branding from reports

For a low fee of \$100 + GST per month, replace the MyMalekso™ branding on reports with your own. This fee covers an unlimited number of reports per month. Contact us to enable this feature.

Referrals from MyMalekso™ to Advisors

As part of our commitment to supporting Advisors, we are proactively engaging with various organisations to present MyMalekso™ as a solution to their needs. These include local councils, chambers of commerce, economic development authorities, industry bodies and more.

Where MyMalekso™ negotiates a bulk licence or bulk service contract with such an organisation, we will, where relevant, approach advisors using the MyMalekso™ platform to provide the services involved. In most instances the scope of work and associated fee will be agreed in advance and advised you before the projects commence. In all circumstances advisors will be paid a minimum of \$150 + GST per hour, depending on the contract, and will invoice MyMalekso™ directly as the primary contract holder.

In addition, we have built a proactive re-target marketing campaign. Any businesses accessing a self-service product will be referred to the advisor driven products, with the aim of generating leads and work for all Advisors using the MyMalekso™ platform.

Advisory Firm dashboard

COMING SOON

Advisory Firm and senior management visibility over their teams from a service delivery perspective.

- A list of your Advisors.
- View the individual advisor dashboards for each member of the Advisory Firm.
- View the client dashboards associated with each advisor on your team, allowing you to monitor service delivery.
- Move clients from one advisor to another seamlessly.

Expected launch March 2022



If you're not using
MyMalekso™ yet,
find out what it
can do for you!

The innovative digital
platform helping Advisors
and Advisory Firms
generate more business
and improve their
bottom line.

Using high impact digital
technology to deliver affordable
business advisory services
and mentoring solutions.

Contact MyMalekso™ for more information
or a confidential chat about your needs.



Peter Spinda

Business Hours AEST (Australia)
Mobile: 0434 236 418
Email: peter@mymalekso.com.au

mymalekso.com.au



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