



# BUSINESS PARTNER SUPPORT

## How can I work with Blue Wealth?

Blue Wealth Property is dedicated to supporting our Business Partners integrate property into their business. Our primary focus is on research and education and through this we are able to assist your clients make the best possible investment decisions.

### WHAT'S THE BEST WAY TO INTRODUCE BLUE WEALTH TO MY CLIENTS?

Where possible we encourage Business Partners to invite clients to a Blue Wealth seminar as the first part of the sales process. Our seminars are held around the country and are based on the demand of Business Partner's and their ability to get clients to an event.

### WHAT IF THERE ISN'T AN EVENT SCHEDULED IN MY CITY?

If there isn't a Blue Wealth event scheduled in your city, we can still assist your clients. In these circumstances, you book them in for a personal video conference with our Property Specialist. The video conference is designed to include key parts of the educational content discussed in the seminar – but the messages and focus can be more personal, as it's not being delivered to a large audience – instead it just your clients!

### HOW DO I ARRANGE A VIDEO CONFERENCE?

Simply complete Blue Wealth's Client Referral Form. This form should be either emailed to **Julie@bluewealth.com.au** or faxed to Julie Gray on **(02) 9743 0377**. If you would prefer to speak to Julie she can be contacted on **(02) 9743 0077**. Julie Gray is our Senior Relationship Manager and she will liaise with you to ensure your clients are well looked after.

### WHAT'S MY ROLE IN THE SALES PROCESS?

The Business Partner plays an important role in the sales process. They are responsible for holding the relationship, qualifying the client, being present at the meeting and assisting with the follow up sales support. The video conference is held at the Business Partner's office – and effectively they are the 'host' of the meeting, and Blue Wealth is the expert called in to educate the client and

select appropriate properties for the client. Having the Business Partner actively involved has the benefits of strengthening your relationship with clients and increasing conversions.

### HOW DOES THE VIDEO CONFERENCE WORK?

We use an internet solution called: [GoToMeeting.com.au](http://GoToMeeting.com.au) This will allow you and your client to see (on screen) a presentation and cash flow analysis presented by Blue Wealth's Property Specialist. You will also be able to see the Property Specialist.

### IS IT EASY TO USE?

Yes it is. Blue Wealth will arrange a suitable meeting time with you and then email you a link to the meeting. At the scheduled time, you click on the link and your computer screen will show the presentation and Blue Wealth's Property Specialist. For first time users we recommend you do a quick 'test' with us before your scheduled meetings with clients. This will give you confidence and show you how easy it is.

### DO I NEED ANY SPECIAL EQUIPMENT?

All you need is an internet connection and ideally a web cam and mic (this is built into most laptops).

If you do not have a web cam and mic please let us know as we can arrange for the service to be provided over the internet and phone lines.