




BUILDING CENTREPOINT'S INSIGHTS ENGINE

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HEAD OF TRANSFORMATION PROGRAM DELIVERY

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If you make sure you're connected,
The writing's on the wall
But if your mind's neglected,
Stumble you might fall

Stereo MCs, 1992

OUR STRATEGIC REVIEW | OUR CLIENT CHALLENGE



INSIGHT

- Financial
- Compliance
- Clients

ACTION

- How has it changed?
- How does it compare?
- What should I do?

PROGRESS

- Goal / Objectives / Tasks
- DIY guidance

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VERSION 1.3 | UI UPGRADE IMMINENT

Business Plan

Late In next 30 days

35 new clients - 80% conversion rate 28 Feb

Financials

Year to Date ▾

REVENUE

\$832,437
+30.07%
vs \$640,000 (Budget)

EBITDA

\$48,437
-69.73%
vs \$160,000 (Budget)

EXPENSES

\$784,000
-63.33%
vs \$480,000 (Budget)

PRODUCTIVITY

\$208,109

Revenue/Adviser

19

Clients/Adviser

Newsfeed

Updates

Events

31 JAN
Professional standards update - New Licensee Standards available: Client Review [Read more](#)

31 JAN
Research News - APL and Market and Economic Updates. [Read more](#)

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Governance

DUE THIS MONTH

Opt In	10	\$1,626
FDS	71	\$12,282

INVESTMENT COMMISSION

9.24% of total

REVENUE
\$115,754 total

FEE/ADVICE RISK

90 clients \$192,458

DUE CURRENT MONTH

0 clients \$0

AUDITS

0	Significant Dev
0	Required
0	Dev Required
0	Remediations

Clients

Leads

\$2,063

Average Client Fee

Services

\$117,799

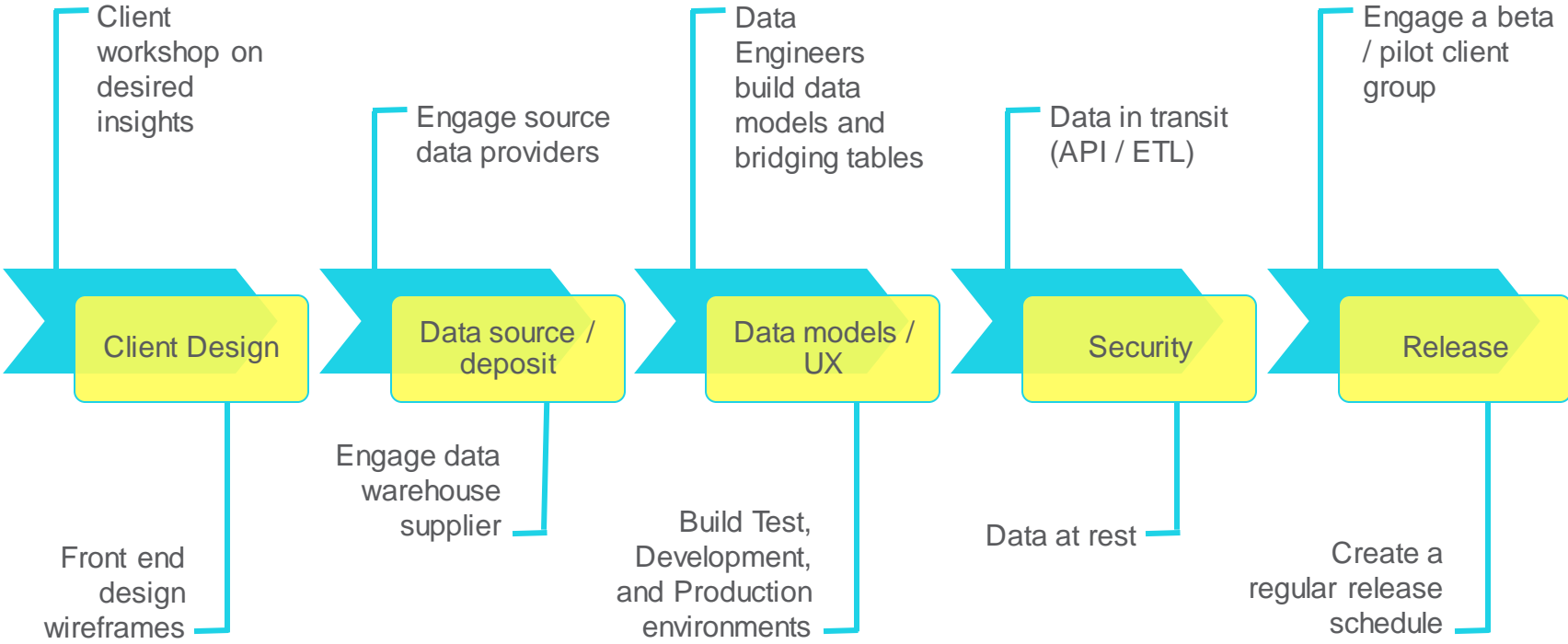
Attrition

Client Type (Rolling 12 Months)

Active	Insurance	Passive
74	185	348
\$287,426	\$346,160	\$618,777

THE STEPS TO BUILD A PROPRIETARY INSIGHTS ENGINE

From a standing start... zero data strategy!



LOOKING AHEAD...

- Consumer desire for 'right solution at right time'
- Economic and market environment outlook
- A more active regulator with expectations towards real-time-compliance
- Don't wait for adversity to innovate

There is a journey ahead, but the compounding return on effort will be reaped by those who start now.

So begin your journey, and get in touch if you want to discuss any aspect at all

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