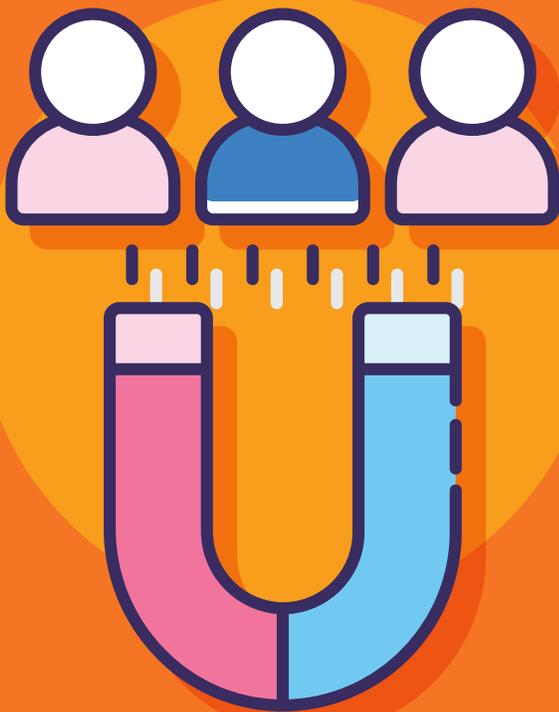




# TOP 5 TIPS

On Generating commercial leads from your existing customers



 1300 023 023

## 1 Start with the Self Employed

If a customer is self-employed this can be the first indication that there is more than likely a need for commercial debt somewhere within the business. Having a thorough understanding of the customer operations, strategies and future goals can help identify areas where the customer may need either new commercial debt or the restructure of existing debt if there are already facilities in place.

## 2 Look for commercial debts on their A&L + Balance Sheets?

If your client has existing commercial debt facilities in place, offering a no-obligation review of this debt is an effective way of generating new business for an existing customer. Not only will this assist the customer with restructuring their facilities (if and where required) but it will show them that you are looking at their position holistically and not just as an isolated transaction. Sometime they may not be listed on their A&L, also review their balance sheet and you might find a surprise.

## 3 Are you building relationships with consultants?

Everyone is a potential customer and the more your existing customer base grows, so to does your of external consultants that you may be dealing with on a particular transaction. It is important to build strong communication channels and relationships with your existing customer's accountants, solicitors, builders and any other stakeholders to the current deal as this can often lead to either a new referral source or a new deal itself. The more people you can extend your offering to the better.

## 4 Pre-approved Equipment finance for Self Employed

When doing any type of finance for your self employed customers why not offer to get them an asset finance pre-approval. Its not heavily labour intensive and you'd likely have all the information required with your current application. Sometimes putting in place a \$60-100k limit for a customer might just be the little push they need to replace their vehicle or that forklift they need within their business but hadnt gotten around to it.

## 5 Finally let everyone know you offer commercial finance!

The last tip and probably the 'slow burn' of our lead generation tools is ensuring you have prompts set up in your CRM to make contact with existing customers annually. Let them know you are can help with their commercial requirements. This helps to keep your business front of mind and reminds your customers that you not only exist but you also care about your transactions post settlement. Thus can be crucial to encourage word-of-mouth leads to be sourced for your business.