



Marketing Passport®

*Your complete marketing
foundation, organised in one place.*

Foundations » Strategy » Execution Readiness



GNR MEDIA
GROWTH AND REVENUE

CLIENT INFORMATION

1. BUSINESS BASICS

Full Name:	Sandeep K S		
Website Address:	cashwise.net.au		
Business Stage: (Idea/ Growing/ Established)	Established	Primary Contact:	Sandeep K S
		Country:	Australia
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Which industry best describes your primary business?

Cashwise operates in the financial services and financial technology (fintech) industry, with a focus on financial organisation, reporting, and tax-readiness support for individuals and businesses.

How does your business primarily operate?

The business operates primarily as an online service, delivering digital financial reports, data collation, and insights through secure systems, supported by professional consultation where required.

Where do you currently serve customers?

Cashwise serves customers Australia-wide, supporting individuals, families, and businesses across multiple states through online delivery.

If you have a physical presence, where is it located?

Cashwise operates without a customer-facing shopfront and primarily functions as a remote and online business. Any physical operations are conducted via office or home office locations. N/A for public physical premises.

Which location matters most for your growth right now?

Australia, with a focus on expanding national reach and deeper penetration across key metropolitan and regional markets.

2. MISSION, VISION & VALUES

(WHY YOU EXIST AND WHAT YOU STAND FOR)

Mission (what you do and who you help?)

Cashwise helps individuals, families, and small businesses gain clarity and control over their finances by making financial management simple and easy to understand. We bring income, expenses, assets, liabilities, and tax-related information into one clear view so people can make confident financial decisions without confusion or stress.

Vision (what success looks like in the future?)

Our vision is a future where managing money feels calm, proactive, and empowering. Cashwise aims to become a trusted financial platform that helps people understand their financial position, plan ahead with confidence, and build long-term financial security through clear, automated insights.

Core values (3-5 guiding principles)

Simplicity We believe financial tools should be easy to use and easy to understand.

Clarity We focus on providing clear and meaningful financial insights.

Accessibility We make financial management affordable and available to individuals, families, and small businesses.

Trust We operate with transparency, integrity, and strong data security.

Empowerment We support better decision-making by giving people confidence and control over their finances.

3.PRODUCTS & SERVICES

((WHAT YOU ACTUALLY SELL))

List of core products/services .

Cashwise provides a digital financial management platform that helps individuals, families, and small businesses organise and understand their financial information. The platform connects to financial accounts to present income, expenses, assets, liabilities, and tax-related data in one clear and central view, supported by automated insights and projections.

Outcomes: the results your customers get.

Customers gain clarity and confidence around their financial position. They can clearly see where their money comes from, where it goes, what they own, and what they owe. This improved visibility reduces confusion and stress and supports better financial awareness, planning, and informed decision-making without complexity.

Pricing: how you package or charge for your work.

Cashwise operates on a subscription-based pricing model. Customers pay an ongoing fee to access the platform, with different pricing tiers providing increasing levels of features, automation, and insights. Pricing is designed to be accessible and scalable rather than personalised or advisory-based.

Hero Offer: the offer that drives most of your revenue.

The core hero offer is the Cashwise subscription platform, which delivers an automated financial snapshot and ongoing insights in one place. This recurring subscription is the primary driver of revenue and long-term customer value.

4. AUDIENCE & CUSTOMERS

(WHO YOU'RE FOR)

Ideal customer profile (plain English) .

The ideal Cashwise customer is an individual, family, or small business owner who wants clarity over their finances but feels overwhelmed by traditional financial tools. They value simplicity, want to see everything in one place, and prefer automated tools over manual spreadsheets or complex systems.

Customer segments (if you serve more than one type of customer).

Cashwise serves multiple customer types, including individuals and families managing household finances, as well as small business owners seeking a clear view of cash flow, assets, and obligations. These customers share a common need for clarity, visibility, and ease of use rather than complex financial systems.

Customer Problems: the challenges they face.

Customers struggle with fragmented financial information spread across multiple accounts and platforms. They often feel uncertain about their true financial position, future cash flow, and tax readiness. Existing tools feel confusing, time-consuming, or require too much manual effort.

Why do customers choose you?

Customers choose Cashwise because it delivers clarity without complexity. The platform brings financial information together in a simple, automated way, making it easier to understand their position and stay organised. Cashwise is accessible, easy to use, and focused on providing insights and visibility rather than complicated processes.

5. COMPETITORS & DIFFERENTIATORS

(WHERE YOU SIT IN THE MARKET)

Direct Competitors: businesses offering similar products or services.

Direct competitors include digital financial management and budgeting platforms that aggregate financial data and provide tracking and forecasting tools. These platforms typically focus on budgeting, net worth tracking, or forecasting but often require significant manual input or have a steep learning curve.

Indirect Competitors: alternatives your customers might choose instead.

Indirect competitors include spreadsheets, accounting software, bank dashboards, and fragmented apps used to track spending, assets, or liabilities separately. Some customers also rely on informal methods such as manual tracking or delayed reviews with professionals, which can limit visibility and consistency.

Your Edge: what you do differently and why customers choose you.

Cashwise stands out by delivering clarity through simplicity and automation. Instead of complex systems or manual tracking, Cashwise brings financial information into one clear view with minimal effort required from the user. The platform focuses on visibility, insights, and forward-looking projections, making it easier for customers to understand their position and stay organised without feeling overwhelmed.

6. BRAND POSITIONING & MESSAGING

(HOW YOU EXPLAIN YOURSELF TO THE WORLD)

Positioning Statement: the core idea you want to own.

Cashwise is a simple financial clarity platform for individuals, families, and small businesses who want to understand their finances without complexity. It brings all key financial information into one clear view, helping users see where they stand and plan ahead with confidence.

Short pitch / 7-second explanation.

Cashwise helps you see your full financial picture in one place, so you can understand your money clearly and stay in control without stress or complexity.

Hooks/Taglines: memorable lines that spark interest.

Cashwise is built around the idea of clarity and simplicity in money management. Messaging focuses on removing confusion, reducing overwhelm, and making it easy to understand your financial position at any time.

Tone of Voice: choose the style that fits your brand.

The Cashwise tone of voice is clear, calm, and reassuring. Communication is simple, human, and practical, avoiding jargon or complexity. The brand speaks with confidence and transparency, focusing on clarity, insights, and ease of understanding rather than technical or authoritative language.

7. BRAND STORY

(EMOTIONAL CONTEXT)

Who is your ideal customer?

The Cashwise customer is an individual, family, or small business owner who wants to feel in control of their finances but feels overwhelmed by scattered information and complex tools. They are capable and responsible, but short on time and mental space when it comes to managing money.

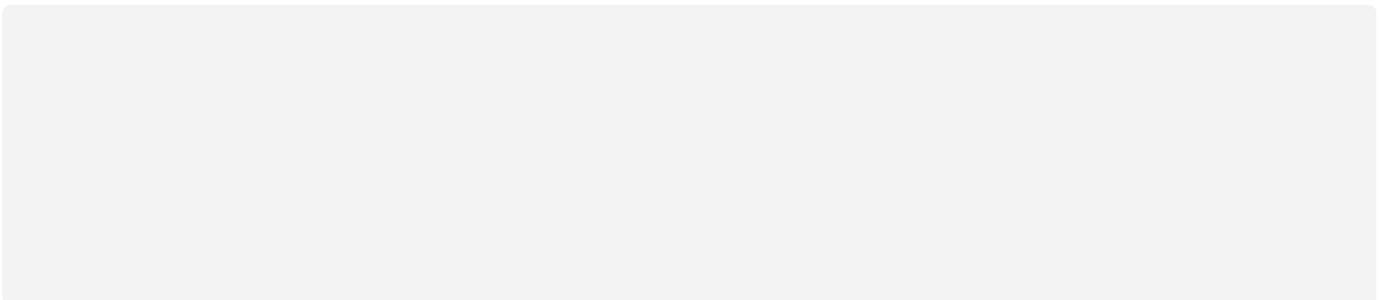
What are they struggling with?

They are dealing with financial information spread across multiple accounts, platforms, and documents. They feel uncertain about their true financial position and future cash flow, which creates stress, hesitation, and a sense that money management is harder than it should be.

How does your brand help?

Cashwise acts as a clarity partner by bringing everything together into one simple, easy-to-understand view. The platform removes confusion by organising financial information and presenting clear insights that help customers see where they stand and what's coming next.

What does life look like after success?



8. BRAND PERSONALITY & VOICE

(HOW YOU SOUND AND SHOW UP)

Brand personality traits.

Cashwise is calm, clear, and reassuring. The brand feels practical rather than flashy, confident without being authoritative, and supportive without being complicated. It is modern, trustworthy, and focused on making money feel manageable and understandable.

Voice Guidelines: the do's and don'ts that keep your communication consistent.

Cashwise communicates in plain, human language that avoids jargon, fear-based messaging, or technical overwhelm. The brand speaks clearly and simply, focusing on clarity, insights, and visibility rather than instructions or directives. Communication is transparent, respectful, and grounded, helping customers feel informed rather than pressured.

One-Word Descriptor: the single word that captures your brand's essence.

Clarity

9. BRAND STYLE GUIDE

(HOW YOU LOOK?)

Logo [upload].



Brand colours, e.g: your colour codes: #8c52ff

Cashwise uses a light green colour theme as its primary brand colour. Light green represents clarity, calmness, growth, and financial well-being. Supporting colours should remain neutral and minimal so the light green theme remains the dominant and recognisable visual element across all brand touchpoints.

Fonts / typography.

Cashwise typography is clean, modern, and easy to read. Font choices prioritise clarity and accessibility, especially for digital use. Typography should feel professional and simple, avoiding decorative or complex styles that reduce readability.

Visual preferences.

The overall visual style of Cashwise is clean, calm, and minimal. Layouts should feel open and organised, using white space to reduce visual noise. Visual elements should support understanding and reinforce the brand's focus on clarity, simplicity, and ease of use.

10. WEBSITE & INFRASTRUCTURE

SNAPSHOT

(EXECUTION READINESS – SIMPLIFIED)

What website platform do you use? Tick one. If you select other, please provide the platform name.

Wordpress Webflow Shopify Other _____

Where is your Domain or DNS hosted?

Cloudflare GoDaddy Namecheap Unsure

Do you have full website access or not?

Yes No

11. MARKETING CHANNELS (CURRENT & PLANNED)

(WHERE YOU SHOW UP)

Current channels in use.

Cashwise currently uses its website as the primary marketing channel, supported by direct conversations, referrals, and relationship-based outreach. Content on the website focuses on explaining the platform clearly and building trust through transparency and simplicity.

Channels you want to use next.

Future marketing efforts will expand into digital channels that support education and clarity, including search, content marketing, and selected social platforms. These channels will be used to increase awareness, explain the value of financial clarity, and reach individuals and small businesses seeking simple financial tools.

Paid vs organic mix (if any).

Cashwise prioritises organic growth through clear messaging, content, and referrals while selectively testing paid channels to accelerate reach. Paid activity is intended to support visibility and demand generation, while organic channels remain central to building trust and long-term brand recognition.

12. MARKETING ASSETS (EXISTING)

(WHAT YOU ALREADY HAVE TO WORK WITH)

- **Logo files**
- **Photos**
- **Videos**
- **Testimonials**
- **Case studies**
- **Written content**

Cashwise has an established primary logo that is used consistently across the website and brand materials. The logo is available in standard digital formats suitable for online use and can be adapted for future campaigns and platforms as needed.

Current brand imagery focuses on clean, minimal visuals aligned with the Cashwise light green theme. Additional lifestyle, product interface, and brand imagery can be developed to support broader marketing activity and storytelling.

At present, video content is limited. There is an opportunity to create short explainer videos, platform walkthroughs, and educational content to clearly communicate the Cashwise value proposition across digital channels.

Formal testimonials and written customer feedback are limited at this stage. As the platform grows, collecting customer experiences and feedback will become an important trust-building asset.

Case studies are not yet a core asset. Future case studies can be developed to demonstrate how customers gain clarity and confidence through using the Cashwise platform.

Cashwise currently uses clear website copy to explain the platform and its purpose. Additional written content such as articles, guides, and campaign copy can be created to support awareness, education, and organic growth.

13. KEYWORDS & SEO FOCUS

(ONLY NOW DOES THIS MAKE SENSE)

Core topics you want to be known for.

Cashwise focuses on financial clarity, money organisation, cash flow visibility, and simplified financial management. The brand aims to be known for helping individuals, families, and small businesses clearly understand their financial position without complexity, overwhelm, or fragmented systems.

Primary keywords/themes (the search terms and themes your ideal customers actually use)

Primary search themes relate to financial management tools, money tracking platforms, cash flow visibility, budgeting software, net worth tracking, and tax readiness tools. These keywords reflect how customers search when they want clarity, visibility, and simple ways to understand their finances rather than complex or manual solutions.

14. GOALS & SUCCESS METRICS

(WHAT SUCCESS LOOKS LIKE)

Primary business goal (your main focus for the next 6–12 months).

The primary goal for Cashwise over the next 6–12 months is to grow platform adoption by increasing awareness, attracting new users, and converting interest into paid subscriptions. The focus is on building steady, repeatable growth while strengthening brand clarity and trust.

Key outcomes you care about (leads, sales, visibility, etc.).

Success is measured through increased website traffic, higher platform sign-ups, and growth in paid subscriptions. Additional outcomes include improved brand visibility, stronger engagement with content, and increased inbound enquiries from individuals and small businesses seeking financial clarity tools.

Biggest constraints: what's limiting progress (time, budget, clarity, systems).

The biggest constraint limiting progress is the need to balance time, resources, and focused execution while the platform continues to develop and evolve. Maintaining clarity in messaging and prioritising the highest-impact marketing activities is essential as the business scales.

15. BUDGET & DECISION-MAKING

(HOW WORK ACTUALLY GETS APPROVED)

Marketing Budget Range: an approximate amount you're comfortable investing.

Cashwise is comfortable investing a controlled and flexible marketing budget that supports steady growth rather than aggressive spending. Budget allocation is focused on high-impact activities such as website optimisation, content creation, and targeted campaigns, with spend adjusted as results and platform adoption increase.

Decision-Maker: the person who approves spend and final decisions.

Final marketing decisions and budget approvals are made internally by the company leadership. This ensures fast decision-making, clear accountability, and alignment between brand direction, platform development, and growth priorities.

16. COMPLIANCE & PERMISSIONS

(RISK PROTECTION – KEPT LAST)

Do you have permission to use testimonials/photos?

This section confirms how Cashwise manages legal, regulatory, and platform requirements before marketing activity goes live. Cashwise only uses logos, photos, testimonials, and written feedback where clear permission has been granted. Any customer quotes or feedback used in marketing are approved for use, and no personal or sensitive financial information is shared publicly. Brand assets are owned by Cashwise or used with appropriate rights and consent.

Industry Rules: any sector-specific regulations you must follow?

Cashwise operates within the financial technology sector and follows relevant regulatory and privacy requirements. Marketing communications are carefully positioned to provide information, insights, and clarity only, without making guarantees or personalised claims. Messaging avoids regulated financial representations and complies with data protection, privacy, and consumer transparency standards.

