



FINDING HIDDEN VALUE

# Marketing Passport®

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

*Foundations » Strategy » Execution Readiness*



GNR MEDIA  
GROWTH AND REVENUE

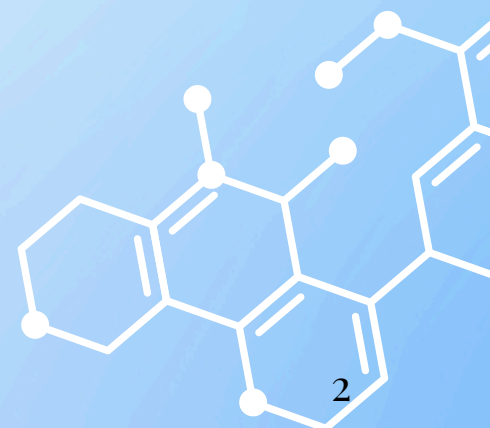


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# CLIENT INFORMATION

## 1. BUSINESS BASICS

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<b>Website Address:</b>	EzySWOT.com		
<b>Business Stage: (Idea/ Growing/ Established)</b>	Launch / Growing	<b>Primary Contact:</b>	Phil Greer
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### Which industry best describes your primary business?

EzySWOT operates in the business advisory, diagnostic, consulting and professional services technology space. It supports accountants, lawyers, business coaches and bookkeepers who advise small and mid-sized business clients.

### How does your business primarily operate?

EzySWOT primarily operates online, using a platform-based and appointment-based model. Advisors use the system with their business clients to complete a structured diagnostic, generate a report and connect the client with relevant experts.

### Where do you currently serve customers?

EzySWOT currently serves customers across Australia, with the ability to support advisors and businesses in other Englishspeaking markets over time.

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

EzySWOT is primarily operated online. The business is based in Sydney, NSW, Australia, but does not rely on a customerfacing shopfront.

## **Which location matters most for your growth right now?**

The main growth focus is Australia first, especially advisors working with small and mid-sized businesses. Future growth may include the United Kingdom, United States and other English-speaking markets.

## **2.MISSION, VISION & VALUES**

(WHY YOU EXIST AND WHAT YOU STAND FOR)

### **Mission (what you do and who you help?)**

EzySWOT helps accountants, lawyers, business coaches and bookkeepers deliver better advice to small and mid-sized business clients. It gives advisors a structured diagnostic system that uncovers risks, gaps and growth opportunities, then connects the client with the right expert help where needed.

### **Vision (what success looks like in the future?)**

Our vision is for EzySWOT to become the go-to business diagnostic system for advisors who want to deliver broader, smarter and more valuable advice without needing to be experts in every field. Success means more business owners get practical clarity, better decisions and access to trusted experts who can help them improve, protect and grow their business

### **Core values (3–5 guiding principles)**

**Clarity:** Business owners are often surrounded by complexity, so EzySWOT is designed to make problems, opportunities and next steps easier to see.

**Practical Value:** The system is built to identify real-world improvements that can lead to better cash flow, reduced risk, stronger operations and increased business value.

**Accessible Expertise:** EzySWOT helps connect business owners with high-quality specialists without forcing the advisor to personally solve every issue.

**Trust:** Advisors, clients and experts all need to feel confident that the process is professional, useful and focused on the client's best interests.

**Continuous Improvement:** EzySWOT is built to keep improving the diagnostic, the reports, the expert network and the outcomes for advisors and their clients.

### **3. PRODUCTS & SERVICES**

((WHAT YOU ACTUALLY SELL))

#### **List of core products/services.**

- Business diagnostic platform for professional advisors — accountants, lawyers, coaches, bookkeepers
- Structured diagnostic session tool — identifies risks, gaps and opportunities across key business areas
- Report generation — produces a practical, tailored client report from each diagnostic
- Expert matching and connection — links business clients with relevant specialists for free 30-minute consultations
- Advisor subscription packages — monthly and annual options with varying usage levels
- Additional diagnostic report purchases — available when advisors need extra capacity

#### **Outcomes: the results your customers get.**

- Advisors deliver broader, more valuable advice without needing to be experts in every specialist area
- Business clients gain clarity on risks, hidden value and areas needing immediate action
- Advisors create new advisory revenue streams and strengthen long-term client relationships
- Business owners receive practical improvement opportunities and connections to relevant experts
- Better decision-making across the business through structured, clear findings

#### **Pricing: how you package or charge for your work.**

EzySWOT is primarily priced as a subscription for advisors, with monthly and annual options at different usage levels. Advisors can also purchase additional diagnostic reports when required. The advisor may then charge their own client a separate fee for running the diagnostic and review process.

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

The EzySWOT advisor subscription is the flagship offer — giving advisors access to the diagnostic system, report generation, expert matching and client review process. It allows advisors to turn EzySWOT into an ongoing advisory service, transforming a narrow service provider into a broader strategic advisor who uncovers more value for clients and creates lasting advisory revenue.

## 4. AUDIENCE & CUSTOMERS

(WHO YOU'RE FOR)

### **Ideal customer profile (plain English) .**

EzySWOT is built for professional advisors who work with small and mid-sized business clients and want better advisory conversations. The best-fit customer is usually an accountant, commercial lawyer, business coach or bookkeeper with trusted client relationships who wants a better way to uncover issues, create advisory opportunities and help clients take action.

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

**The Advisor:** Accountants, lawyers, business coaches and bookkeepers who use EzySWOT with their own business clients— the primary and most important segment.

**The Business Owner:** Small and mid-sized business owners who want clearer insight into their business risks, gaps and growth opportunities.

**The Expert:** Specialist professionals — in funding, insurance, HR, legal, tax, succession, systems or growth — who help solve issues identified through the diagnostic.

### **Customer Problems: the challenges they face.**

**For Advisors:** They know there are more ways they could help clients, but lack a simple structure for identifying needs across the whole business. Time pressure and limited specialist knowledge restrict advisory depth.

**For Business Owners:** Often too busy or overwhelmed to step back and assess what truly needs attention. Important risks and opportunities stay hidden until they become costly problems.

### **Why do customers choose you?**

**Repeatable System:** EzySWOT gives advisors a structured, practical and repeatable way to uncover hidden value across many clients.

**Broader Value Delivery:** Helps advisors turn a normal client relationship into a broader advisory opportunity — without needing expertise in every area.

**Clarity for Clients:** Business owners receive a clear report, actionable next steps and access to relevant expert help — providing confidence and direction.

## 5. COMPETITORS & DIFFERENTIATORS

(WHERE YOU SIT IN THE MARKET)

**Direct Competitors: businesses offering similar products or services.**

EzySWOT's direct competitors include business diagnostic tools, advisory platforms, consulting frameworks and software used by accountants, lawyers, business coaches and bookkeepers to assess business clients. Some firms also use their own internal checklists, spreadsheets, strategy templates or advisory processes instead of a dedicated platform.

**Indirect Competitors: alternatives your customers might choose instead.**

Indirect competitors include traditional consultants, business coaches, accountants, lawyers and other advisors who provide advice without using a structured diagnostic system. Other alternatives include online business assessments, generic AI tools, planning workshops, advisory programs — and doing nothing at all because the business owner is too busy or unsure where to start.

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

### **The Unique Edge**

EzySWOT does more than produce a checklist or report. It helps advisors run a structured diagnostic, uncover hidden risks and opportunities, create a tailored business report, and connect the client with relevant expert help.

**Repeatable System:** Unlike a normal consulting session, EzySWOT gives the advisor a system they can use consistently across many clients.

**Practical Design:** Unlike generic software, it is designed around practical business improvement and advisor-led conversations — not just data collection.

**Smart Expert Matching:** Unlike a simple referral directory, EzySWOT links specific business issues to appropriate experts after the diagnostic has identified the need.

**Advisory Revenue Creation:** EzySWOT helps advisors grow advisory revenue, strengthen client relationships and deliver more than compliance — without becoming an expert in every business area.

## 6. BRAND POSITIONING & MESSAGING

(HOW YOU EXPLAIN YOURSELF TO THE WORLD)

**Positioning Statement: the core idea you want to own.**

EzySWOT is the business diagnostic system for advisors who want to uncover hidden value for their clients and connect them with the right expert help. It helps accountants, lawyers, business coaches and bookkeepers deliver broader, smarter advice without needing to be experts in every business area.

**Short pitch / 7-second explanation.**

"EzySWOT helps advisors run a structured business diagnostic, generate a practical client report, and connect business owners with expert help where it is needed most."

**Hooks/Taglines: memorable lines that spark interest.**

The Value Hook: "Uncover hidden value in every client."

The Advisory Hook: "Turn client conversations into advisory opportunities."

The Platform Hook: "The business diagnostic system for modern advisors."

The Insight Hook: "Help clients see what they are missing."

The Outcome Hook: "Broader advice. Better reports. Smarter expert connections."

The Action Hook: "Stop guessing where the opportunities are."

The Core Tagline: "From diagnostic to expert action plan."

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

**Clear, Practical and Confident:** Professional without being stiff, smart without being complicated, commercially focused without sounding pushy.

**Advisor-Focused:** Speaking directly to advisors who want to grow their value, strengthen client relationships and move beyond narrow compliance work.

**Outcome-Focused:** Messaging centres on clarity, hidden value, advisory revenue, risk reduction, expert access and practical next steps — avoiding hype, jargon and vague claims.

EzySWOT's voice is straightforward, credible and commercially grounded — making complex business issues easier to understand and easier to act on.

## 7. BRAND STORY

(EMOTIONAL CONTEXT)

### Who is your ideal customer?

**The Hero:** You are a professional advisor — an accountant, commercial lawyer, business coach or bookkeeper — with strong client relationships built on years of trust. You know your clients need more from you, but the daily pressure of compliance and core service delivery leaves little room to see the bigger picture.

### What are they struggling with?

**The Villain — Hidden Complexity:** Many advisors know their clients have hidden risks, missed opportunities and areas of untapped value — but they do not always have a simple way to uncover them. Valuable advisory conversations get missed or delayed. Business owners remain too busy running their business to step back and see what is being missed. Important risks stay hidden until they become costly problems.

### How does your brand help?

**The Guide — EzySWOT:** EzySWOT acts as the guide. It gives the advisor a structured diagnostic system that helps them identify what is really going on inside the client's business. It turns broad business issues into clear findings, practical next steps and relevant expert connections — so the advisor can move from reactive service provider to proactive strategic advisor.

**The Plan — The EzySWOT Diagnostic System:** A structured, repeatable process that uncovers risks, gaps and growth opportunities across the whole business. The system generates a clear client report and connects the business owner with specialist experts who can help solve specific problems.

### What does life look like after success?

**The Transformation:** After using EzySWOT, advisors can show clients where risks need attention, where value may be hidden, and which expert help could make a difference. The client gets clarity and direction. The advisor strengthens the relationship and creates new advisory opportunities. Business owners are no longer surrounded by complexity — they have a clear picture and a practical path forward.

## 8. BRAND PERSONALITY & VOICE

(HOW YOU SOUND AND SHOW UP)

### **Brand personality traits.**

**Clear & Practical:** EzySWOT makes business complexity easier to see. The brand feels intelligent and commercially focused — like a smart advisor who can quickly identify the bigger picture and explain things simply.

**Trustworthy & Experienced:** The brand feels established and credible, but not old-fashioned or overly formal. It earns trust through structured process and real business outcomes — not promises or hype.

**Action-Oriented:** EzySWOT always points toward useful action — hidden value, clearer decisions, expert connections, stronger advisory conversations. It does not linger in the problem.

**Professional but Human:** The brand makes advisors feel supported and capable, while making business owners feel understood, clear and ready to act.

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

**Speak in plain English:** Direct, confident and useful. Focus on real business outcomes — hidden value, stronger advisory conversations, risk reduction, expert support and practical next steps.

**Avoid jargon and hype:** Do not sound like a generic software company or a traditional corporate consultant. Avoid overpromising and do not make business improvement sound automatic or effortless.

**Be outcome-focused:** Every message should connect to a clear result — for the advisor, the business client, or the expert.

**Use straight-talk:** Be honest about what EzySWOT does and does not do. The brand's credibility comes from clarity, not from ambitious claims.

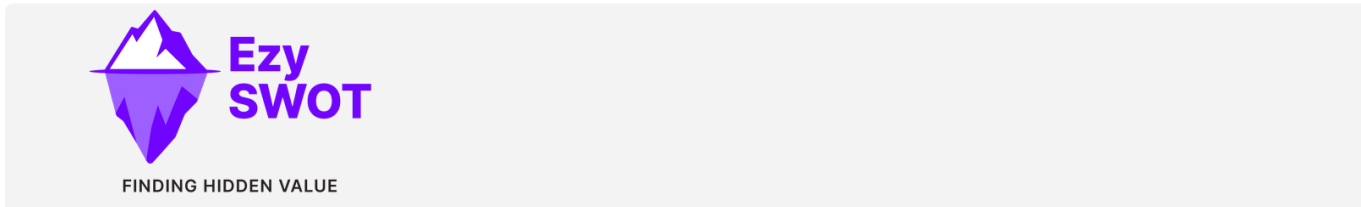
### **One-Word Descriptor: the single word that captures your brand's essence.**

This word captures the heart of the brand. EzySWOT exists to give advisors and business owners a clearer picture of what is really happening inside the business — so they can make better decisions, reduce risk, uncover hidden value and take confident action with the right expert support.

## 9. BRAND STYLE GUIDE

(HOW YOU LOOK?)

Logo [upload].



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

### Brand colours:

	Primary Purple	#7B2FBE
	Deep Purple	#5A1A9E
	Dark Purple	#3D0F7A
	Pure Black	#000000
	Light Grey Background	#F0F0F0
	White	#FFFFFF

### Fonts / typography.

Clean, modern and easy to read. Headings use a confident, professional serif display style (Georgia or equivalent). Body text uses a clear sans-serif (Arial or equivalent). Overly decorative or hard-to-read fonts should be avoided.

### Visual preferences.

Clean, structured and commercially credible. The EzySWOT visual style should feel like a modern business advisory platform — not a generic software app or a traditional consulting firm. Visuals should use clear layouts, strong headings, simple diagrams, practical screenshots and business-relevant imagery. The brand should look professional, sharp and useful, reinforcing the idea that EzySWOT brings clarity to complex business issues and helps advisors uncover hidden value for their clients.

## 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.**

**Warm Outreach (Primary Channel):** Personal networks, warm email outreach, LinkedIn connections, event contacts, accountant and advisor databases, referral conversations, Loom/video demos and direct booking links for discovery or onboarding calls. The strongest current channel is warm outreach to advisors who already know the business.

**Channels you want to use next.**

**LinkedIn Content & Outreach, Educational Email Sequences, Webinar-Style Demos, Advisor Onboarding Pages:** Over time, partner/referrer channels, expert-led content, case studies, event follow-up campaigns and paid retargeting once the core message and conversion process are proven.

**Paid vs organic mix (if any).**

**Growth Maxim — Organic First:** Focus should be mostly organic and relationship-led. Paid advertising should not be the main focus until the offer, landing pages, onboarding process and conversion tracking are working properly. Priority: warm email, LinkedIn, direct outreach and helpful educational content that explains how advisors can uncover hidden value and grow advisory revenue.

## 12. MARKETING ASSETS (EXISTING)

(WHAT YOU ALREADY HAVE TO WORK WITH)

- Logo files** — Available in PNG, SVG and PDF formats for use across website, presentations and social media
- Photos** — Additional founder photos, platform screenshots and professional brand imagery to be developed
- Videos** — Loom-style video demos, platform walkthroughs and educational explainer videos in development
- Testimonials** — To be collected as the platform is used by advisors, experts and business clients
- Case Studies** — To be developed, showing the advisor diagnostic process, findings and expert recommendations
- Written Content** — Website copy, advisor messaging, FAQs, email drafts, onboarding material and educational content in development
- Priority Gaps:** Polished case studies, testimonials, founder photos, short social videos and a central approved marketing asset folder.

## 13. KEYWORDS & SEO FOCUS

(ONLY NOW DOES THIS MAKE SENSE)

### Core topics you want to be known for.

EzySWOT should be known for business diagnostics, advisor-led business improvement, uncovering hidden value in small and mid-sized businesses, practical advisory systems, expert matching and helping advisors move beyond narrow compliance work. Content themes should focus on how accountants, lawyers, business coaches and bookkeepers can create better advisory conversations, identify more client needs, generate new advisory revenue, and help business owners make clearer decisions.

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

**Platform & System Keywords:** business diagnostic system, business diagnostic tool, business advisory platform, advisory software for accountants, small business diagnostic, business advisory system, business health check, business improvement assessment.

**Advisor-Focused Keywords:** how accountants can grow advisory revenue, business advisory software, tools for business coaches, advisory tools for bookkeepers, client advisory system, advisory services for accountants.

**Business Owner Keywords:** business health check, identify business risks, improve business value, business growth opportunities, business diagnostic report, expert business advice.

**SEO Priority:** First focus on advisor-focused content — targeting those who want a structured way to deliver more valuable advice to clients.

## **14. GOALS & SUCCESS METRICS**

(WHAT SUCCESS LOOKS LIKE)

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

EzySWOT's primary business goal for the next 6–12 months is to launch and prove the advisor subscription model in Australia — attracting accountants, commercial lawyers, business coaches and bookkeepers who can use EzySWOT with their small and mid-sized business clients.

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

#### **1. Goal: Advisor Acquisition & Platform Activation**

Position the EzySWOT advisor subscription as the go-to tool for advisors who want to deliver broader, smarter advice.

Metrics: Advisor sign-ups, completed diagnostics, booked onboarding calls, active platform usage, client reports generated, expert consultations booked.

#### **2. Goal: Trust & Brand Awareness**

Build credibility through clearer messaging, useful educational content, testimonials, case studies and early proof that advisors can create new advisory revenue through the system.

Metrics: Email response rates, LinkedIn engagement, website visits, demo video views and landing page conversions.

#### **3. Goal: Conversion & Revenue Proof**

Prove which messages, channels and audiences convert before scaling spend.

Metrics: Qualified leads, discovery calls booked, advisor trials started, paid subscriptions, and advisor renewal or continuation rates.

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

#### **The Key Challenge: Execution Focus**

The biggest current constraint is not the size of the opportunity, but execution focus. EzySWOT needs clear messaging, consistent follow-up, finished onboarding assets, reliable systems and a simple marketing process that can be repeated without becoming too complex. The immediate priority is warm outreach, advisor education, demos and onboarding — rather than scaling too many channels at once. Once the first advisor users and case studies are in place, broader marketing can scale with more confidence.

## 15. BUDGET & DECISION-MAKING

(HOW WORK ACTUALLY GETS APPROVED)

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

EzySWOT's marketing budget should be managed carefully during the launch stage, with focus on high-leverage, lower-cost activity: warm outreach, LinkedIn, email campaigns, video demos, advisor onboarding material, referral follow-up and content creation. The initial budget should be flexible rather than fixed too tightly – the priority is to prove which messages, channels and audiences convert before scaling spend.

**Budget Priorities:** Content creation, email and CRM setup, LinkedIn support, landing pages, video assets, marketing automation, onboarding materials and campaign follow-up. Spending should focus on activities that directly support advisor sign-ups, demos, trials and subscriptions.

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

### 1. Chain of Command & Sign-Off

**Final Approval:** Phil Greer holds final sign-off on all strategic marketing, budget decisions, messaging and brand direction.

**Execution Support:** Marketing execution may involve internal team members, virtual assistants, developers, designers, content support or agency partners. Final approval remains with Phil so brand, positioning and commercial direction stay consistent.

### 2. Financial Parameters

Marketing decisions should be based on clear priorities, practical testing and measurable outcomes – focusing on whether each activity helps generate qualified advisor leads, demos, trials or paid subscriptions. Avoid scattered spending.

## 16. COMPLIANCE & PERMISSIONS

(RISK PROTECTION – KEPT LAST)

**Do you have permission to use testimonials/photos?**

EzySWOT should only use testimonials, photos, client names, expert names, logos or case study details where clear permission has been given. Any testimonial or case study used in marketing must be accurate, approved and not misleading. Photos and videos should only be used if EzySWOT owns the content, has permission from the person shown, or holds a valid licence. Stock images should come from legitimate sources.

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

EzySWOT operates in the business advisory and professional services space – marketing must avoid exaggerated, guaranteed or misleading claims. Claims about revenue growth, business value, risk reduction, tax savings, legal outcomes, funding or insurance outcomes should be handled carefully. EzySWOT should not present itself as directly giving legal, tax, financial, insurance or accounting advice unless provided by a properly qualified professional. The safest approach is evidence-based language focused on the diagnostic process, the clarity it creates and the expert connection model – avoiding claims that sound like guaranteed advice or guaranteed commercial results.

