1. WELCOME – ESS BIZ TOOLS STARTER PACKAGE

Thank you for your interest in visiting our website by clicking on to the **Starter Package**.

2. **ESS BIZTOOLS** has developed a comprehensive range of Financial / Commercial / Management Accounting Advisory Services to assist Accountancy, Bookkeeping, Business Advisory and Chief Financial Officer Firms to deliver Business Enhancing Services to Small Medium Enterprises.

Our objective is to supply services which will encourage SMEs to rate their professional advisor – **YOU** their **"KEY STRATEGIC PARTNER"** in accordance with the definition utilised by Intuit QuickBooks in their **"SMB Navigator Report 2025"**.

Key strategic partner – *"they are a key partner in our business and our "go-to" professional for advice, and they are extremely valuable to our business's growth and success"*.

The Starter Package has been developed to assist professional advisers to be able to offer a range of services that introduces clients to Advisory Services as distinct from the preparation of an annual set of accounts and Income Tax Return.

3. The **Starter Package** is an ideal entry into offering advisory services for a bookkeeping firm or an accounting firm that has not offered a significant amount of advisory services previously.

The **Starter Package** components are located in sections:

A. PREPLANNING FOR A SUCCESSFUL BUSINESS:

- "DREAMING ROOM" – questions to consider in visualising how the business will operate.
- Development of a system for this business.
- Understanding business – short articles explaining services that accountants/bookkeepers can provide to SMEs.

B. PREPARATION FOR THE DELIVERY OF SERVICES

- **Business Advisory Services Firm Training** – 13 modules to assist your firm's team to prepare for the delivery of business advisory services.

- **Business Insights** – weekly short articles identifying business advice that accountants/bookkeepers can offer. Our subscribers are invited to badge the article and email to clients and prospects. These insights assist in communicating to your clients that your firm can assist them in a wide range of business matters in addition to taxation returns and advice.

- **Business Plus Newsletter** – monthly newsletter which you are invited to badge with your firm's name and send to your clients and prospects – a great marketing tool for your firm!

  This communication tool will confirm to clients and prospects that you can offer a broad range of advisory services.

  There are normally four to six articles in each edition of Business Plus that are targeted at SMEs at various stages of their SME Journey. The newsletter is designed to discuss issues that SMEs may be interested to obtain additional information from their Accountant/Bookkeeper. This is an effective way to grow your firm's activities with services that generally relate to **Financial / Commercial / Management Accounting Advisory Services**.

  Please click here to view a sample of a recent Business Plus edition.

- **Client Mentoring and Coaching Modules** – promotional resources for you to send to your clients to confirm to them that your firm is able to assist them on a range of non-taxation issues – **Financial /Commercial / Management Accounting Advisory Services Stage I** that are important for their business prospects.

- **Client Seminars** – 35 preprepared seminars on a range of business topics that you can utilise for team training or use these seminars as an – example for the preparation of your own material to present to clients and prospects.

C. BUSINESS ENHANCEMENT TOOLS DEVELOPED FOR ACCOUNTING AND BOOKKEEPING FIRMS TO DELIVER TO SME CLIENTS – STAGE I

- **ESS Papers** – 330 papers on 60 different items affecting business operations – badge and send to your clients and prospects.
- **SME Needs Analysis** – helps you to identify key points to discuss with clients to assist them to appreciate that you can offer services on a wide range of financial management issues.
- **Business Evaluation Workshops** – survival strategies for all types of businesses.
- **Buying a Business** – a complete analysis of items to be evaluated as part of the due diligence for buying a business.
- **Debtors' Management** – understanding the management of debtors is vital knowledge for all small business operators.
- **Debtors' Systems Manual** – this is an important document to assist the person monitoring debtors to have a working knowledge of the process.
- **Government Grants** – an update on government grants particularly targeted at SMEs.
- **Fee Settings for Professionals** – the **ESS BIZTOOLS** calculator for professional firms to determine charge out rates to achieve targeted profitability.
- **Trades Industry Charge out Rates** – most Tradies are underselling themselves – this calculator assists accountants / bookkeepers to fix that problem.
- **Research and Development Introduction** – the Australian Taxation Office has reported that in 2022/23 (the last released figures) approximately 7,000 SMEs participated in Research and Development Activities – this Introduction Package assists you to help your clients gain an understanding of how the Research and Development Tax Offset system operates.
- **Selling a Business** – this package will highlight the preparation that is needed to achieve top value from the sale of a business.
- **Setting Retail Prices**– this calculator assists in the determination of stock category quantities and mark-ups to achieve the business' profit target.

4. ESS BIZTOOLS STARTER PACKAGE OFFER TO YOU if you accept our invitation to become a member

Accountancy and bookkeeping firms subscribe to **ESS BIZTOOLS** for the license to utilise the **Starter Package** for an initial term of one year and then you will be invited to renew your subscription for ongoing access to information packages that are being regularly reviewed and updated to assist in the delivery of **VALUE ADDING ADVISORY SERVICES** to your SME clients. If you wish you can upgrade your subscription level at any time.

5. OTHER RESOURCES INCLUDED IN THE STARTER PACKAGE

Members' Alert – our members receive a monthly newsletter which features information on a wide range of matters relating to the delivery of Business Advisory Services and upcoming member training courses.

Accountants Minute - a weekly newsletter discussing issues of great importance to accountants, bookkeepers, business advisors, Chief Financial Officer firms.

6. TRAINING RESOURCES OFFERED AS PART OF THE STARTER PACKAGE

Training Support – Starter Package

You will be able to access the **Starter Package Introduction Video** explaining the processes discussed in the package.

Members' Training
ESS BIZTOOLS provides 10 members training sessions for the **Starter Package** in a financial year. You will receive notifications of the training program and your team members are entitled to attend each of these 45 minute training sessions.

You will also be advised of the **training sessions** that we are presenting for **Advanced** and **Financial Forecasting Product Package Members**. If you wish your team members are entitled to attend any of these training webinars. There is no additional charge for participation in these member training sessions.

Additional Training
You can request additional training in any aspect of the services provided by **ESS BIZTOOLS.** You can access details of the additional training available and the investment by clicking here.

7. LICENSE AGREEMENT

Every new member/subscriber of **ESS BIZTOOLS** is required to agree to our **License Agreement**. You can access the License Agreement by clicking here.

If you have questions on any aspect of the License Agreement, please do not hesitate to contact our Managing Director, Peter Towers on telephone 0418 190 181.

8. PACKAGE CONTENTS

When you have completed reading this welcome letter you could then scale down to the "Package Contents" for the Starter Package. These are the packages that are currently included within the Starter Package. There will be some additional packages uploaded to the Starter Package during 2026.

To obtain more information on what is included within the package please click on to "more information".

Some of the packages are available on a "Stand-Alone Basis" details of the standalone package subscription are shown when you have clicked on "more information".

To obtain details of the content of an individual package please click on to "learn more".

9. TALENT ATTRACTION AND RETENTION

Attracting and retaining good people is becoming one of the biggest challenges facing our profession.

And if we don't address it….the impact will affect the future growth and sustainability of many accountancy and bookkeeping firms.

The new generation of accountants are looking for something different.

Financial / Commercial / Management Accounting Advisory Services introduces important business services that SMEs need to survive and thrive that are different to services traditionally provided by a large number of Accounting / Bookkeeping firms in Australia.

Offering these advisory services, will assist Accountancy / Bookkeeping firms in the attraction and retention of talent.

10. PLEASE CONTACT US IF YOU HAVE QUESTIONS WE HAVEN'T ANSWERED

You can "BOOK A DEMO" – please complete the form and we will contact you to confirm a time for a short meeting.

If you require any other information on **ESS BIZTOOLS** services to assist Accountants and Bookkeepers to deliver an outstanding range of Advisory Services please complete the "Contact Us" form on the Homepage.

Thank you for your interest in **ESS BIZTOOLS STARTER PACKAGE**. If you would like to review the **ADVANCED PACKAGE** and/or the **FINANCIAL FORECASTING PACKAGE** please return to Packages and Pricing and then click on the Packages that you would like to review.

We are looking forward to being of service to you and your colleagues within your firm.

11. READY TO SUBSCRIBE?

If you are ready to subscribe for the PACKAGE of your choice, please click on "SUBSCRIBE NOW" and complete the subscription form.

You will then be able to log on to your selected package within 24-hours except for weekends which will take a little longer.

12. THANK YOU FOR VISITING ESS BIZTOOLS

Thank you for your interest in reviewing the Package Offerings developed by **ESS BIZTOOLS**.

Have a great day!

Kind regards

ESS BIZTOOLS

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