

A Unique Franchise Opportunity



marketing *stem*[®]

grow with us

Specialist marketing for Small to Medium Enterprises

0508 MARKETING | www.marketingstem.co.nz

Introduction

Thank you for expressing interest in the franchise development opportunity which exists within Marketing Stem – we appreciate your request, and your interest may well be rewarded.

Marketing Stem is an exciting and innovative company that was specifically established to provide a professional integrated marketing service to small to medium sized businesses, that has national capability with local ability.

Integrated marketing solutions have been a vital element to the enhanced growth of established businesses for generations. Today, Marketing Stem has refined this concept to focus on the smaller sized business market, giving business owners/managers the opportunity to contract a marketing professional who will work with them as part of their team to carry out all aspects of marketing from strategy through to implementation. In turn relieving them from a task they may not be confident with and enabling them to focus on the other various aspects of their business operation.

This unique concept also provides development opportunities for individuals focused on marketing as a career and wanting to move from employment to the independence and benefits of a business owner. Marketing Stem is the first known franchise operation available within the marketing industry.

Through this franchise opportunity and by developing relationships with national organisations, Marketing Stems' ambition is to become a nationwide operation, and the consumers first choice for marketing!

Why Marketing Stem?

Marketing Stem has laid the groundwork for an excellent business opportunity with huge potential.

Marketing Stems' objective is to grow itself nationwide. We recognise that to achieve this we require our franchisees to channel their financial investment directly towards promoting themselves so the rewards are delivered as quickly as possible. It is important to us that you as the franchisee can quickly realise the profit making potential of your business without the burden of huge setup costs. Our setup costs are very reasonable and realistic as you do not require stock or to initially have a leased premise – the greatest expenses will be your branded vehicle and computer equipment. The rest is up to your marketing knowledge, customer development and project management skills.

Being a member of any franchise system means you are in business for yourself but not by yourself. By being a part of Marketing Stem means that you have the benefit of a system developed and enhanced through combined experience and operation.

So, whether it's the need for a lifestyle change, more flexible working hours, or the satisfaction of building your own business, with Marketing Stem you have the potential to achieve this success.

“So easy to work with – not a big scary marketing company”



Why You?

- You understand how important the marketing fundamentals are to a business - because you are already absorbed in the ever changing world of marketing!
- You know that local small to medium sized businesses will benefit from integrated marketing solutions but they don't have national agency budgets
- You are passionate about growing your career within the industry by being one step ahead of your colleagues and having no limits set for yourself
- You want to be rewarded with growing through your success

You may already be involved in the marketing industry, and we would certainly welcome an existing support company that wishes to rebrand and take on board the Marketing Stem philosophy. However, this is also an opportunity for a self-employed marketing professional to embark on a business venture that will grow beyond that of a one-man-band, as well as keen entrepreneurs who have an interest in employing a team of marketing professionals to deliver the front line service.

Naturally we understand what is at the heart of every successful person's business interest – we know you want to make a profit. Read on to understand why we believe Marketing Stem may be just the opportunity you're looking for.

Who Are We?

Marketing Stem was established in 2007 by Sheena and Matthew Young after re-branding existing business 3rdi Ltd which had offered the same services since 2003. Their core values not only reflect offering a unique service to small to medium sized businesses, but also:

- Enabling marketing professionals who are focused on marketing as a career the opportunity of supported development
- Company ownership within any area of the country
- Changing the perception of a position within a large agency in a metro city being the only opportunity to exceed within the industry
- Providing a career and lifestyle focus
- Making it more viable to still expand in the industry when a family needs to be considered.

As this initiative provides a completely new dynamic to small to medium sized businesses, and professionals within the marketing industry, it was prudent that growth was managed reasonably carefully with the aim to stay ahead of the competitors and to excite those marketing professionals who are focused on marketing as a career. Therefore, many structures and growth strategies were brainstormed and tested to ensure the most successful solution for both Marketing Stem people and clients, and franchising weighed up as the best strategy to grow the Marketing Stem business. There was no hesitation in contracting the reputable, award winning and professional franchising organization 'The Franchise Coach' for their assistance throughout the entire process. The system was carefully managed and developed over a two year period with the original Waikato operation being the pilot for all decisions.

You can be assured that your Marketing Stem franchise has been carefully developed to operate successfully in your corner of the country.

“Attentive, quickly understood the differences with our business” “Trust in them and the product they produce”



Core Values

Imagine what you could do if you knew
you couldn't fail!

SERVICE	Offer affordable solutions delivered with utmost professionalism and quality
CHARACTER	Build trust and loyalty by being caring, fair and honest
OPPORTUNITY	Be one step ahead and set no limits
REWARD	Grow through success
ENERGY	Boast enthusiasm and find the positive in every situation to achieve the best outcome
SUPPORT	Create a strong open-minded network through teamwork and communication

Our Branding

There is little point in developing a franchise system to provide the best possible service unless your potential customers consistently recognise your brand. Therefore, we have carefully developed our brand to be eye-catching and memorable, along with portraying the key message of growth – people associate the highly satisfying experience they receive with the consistent branded environment and material that surrounds them. They tell their friends and colleagues both locally and nationally, and word of mouth spreads throughout the country.

Referred business owners feel reassured that Marketing Stem will provide them with quality service through professional delivery, strong trust and reliability, competitive pricing and transparency.

As well as the variety of internal services, Marketing Stem offers a range of external services to support client requirements. To ensure a consistent high quality of supply we develop strong relationships with local and national printing, website development, sign-writing, photography, distribution and media organisations. This means less overheads for you and the ability to provide unbiased advice to clients.

“Willing to think outside the square, inject humor and are always cheerful” “Innovative designs and experience of staff”



Why Do Clients Come?

Our Clients contact us if:

- They are a small to medium business or franchise and are looking to significantly build their brand
- They value marketing but it is not their strength
- They know that large advertising agencies can be expensive
- Their budgets need to be invested with care
- They realise it has become increasingly important to maximise traditional and modern communication methods
- They want to be the leader in their industry
- They are not sure who to turn to

Our Clients want to receive a:

- Complete marketing solution from strategy through to implementation, delivery and results tracking
- Local marketing company designed to cater to their needs
- Network of experts in many marketing fields
- Low overhead structure which means kept prices for them
- Single point of contact to be held accountable for their project implementation and save them time

What Do We Provide to You?

Marketing Stem provides the systems and training you need to help operate your business with style, passion and success. We have the experience to know what works – you need the drive and ambition to make your business fly. Together we can be a great team!

The Marketing Stem initial franchise package includes:

Territory - carefully selected within your area to ensure realistic potential. Based on 6,000+ businesses and 75%+ being small to medium sized, with less than 20 staff.

Business Simulator – a fantastic tool for you and your advisors to forecast your revenue and gross profit, total operating expenses and operating profit. Revenue figures are based on key factors such as hours charged, client spend categories, and internal/external project ratio

Manual Set – including Branding & Fitout, Client Services, Employment, and Operations. The Operations Manual encompasses sections such as setting up your office to administration processes, services, accounting, franchise management and reporting, compliance with government and local bodies.

Training Programme – for both internal and external requirements, we provide you and your team with comprehensive training. We assist you in finding the right staff, we teach you about marketing (to enhance your already existing knowledge), we teach you about providing the very best customer experience and about running a successful operation – when you first open we work alongside you to ensure you feel comfortable with the day-to-day operation.

Launch Marketing – developed and implemented together encompassing our previous experiences and your local expertise.

“They work with small to medium businesses and are more affordable” “They were professional and positive”



What You Will Need?

It is recommended that you possess a background in marketing, along with commitment and determination to maintain the high standards Marketing Stem clients have come to expect. You will need a track record of success and a personality that fits with our franchise system, and the needs of your business. And, last but not least, you will need to qualify financially.

Getting Started

To become a Marketing Stem franchise you will need:

- Initial Franchise and Training fee (\$20,000 per new territory)
- Setup a limited company and bank account
- Purchase a Suzuki Swift and have it sign-written
- Develop an initial advertising plan
- Consult with a franchise lawyer, accountant and banker

That's it – you are now ready to run your own Marketing Stem franchise!

Ongoing Costs

Franchise Management Package – Marketing Stem maximises specific modern software and equipment accommodated by a national lease arrangement which is on-charged to each franchisee based on their size. The software allows you ease of client relationship management and project tracking through to financial reporting.

Royalty – a monthly fee is payable for the use of the Marketing Stem intellectual property.

National Marketing – a monthly fee is payable as a contribution which the Franchisor drives to promote the brand.

What Next?

We are keen to discuss and meet with any potential franchisee interested in operating in any area within New Zealand.

If this overview has raised more questions than it answers, we are delighted – there is so much more we can tell you about the Marketing Stem opportunity.

Marketing Stem is an exciting opportunity, one that is rapidly building it's brand by launching it's unique system around New Zealand. We trust you agree, and we look forward to the possibility of working with you as part of the Marketing Stem franchise.

Contact:

Sheena Young

Franchise Manager

0508 MARKETING (0508 627 538)

“Keeps in regular contact and keeps us informed of the latest new ideas in marketing” “Great company all round”



Request for Consideration

The purpose of this REQUEST FOR CONSIDERATION form is for general information which facilitates our effort to evaluate your qualifications to own and operate a **Marketing Stem** franchise. It is not an application form. Information will only be disclosed to our Directors. Completion of this form does not constitute a contract or promise. Should you qualify and a mutual interest develops, we will request additional confidential information. Scope NZ (2008) Ltd (the Franchisor) will not enter into any correspondence or discussion regarding their decision to reject any request. Please return to Scope NZ (2008) Ltd, PO Box 109, Te Kauwhata 3741 or email to sheena@marketingstem.co.nz.

PERSONAL INFORMATION (enclose photograph if available)

Name Mr / Mrs / Miss / Ms _____

Street Address: _____ How long at this address _____

Business Phone: _____ Mobile: _____ Home Phone _____ Best time to call: _____

e-mail: _____

Date of Birth _____ Marital Status _____ Health Good Fair Poor

Do you have permanent residency status in New Zealand? Yes No If No, what country? _____

If No are you legally authorised to work or purchase a business in this country? _____ If so, for what period? _____

Have you ever had a work related accident/injury? Yes No If Yes, what was the nature of this injury? _____

Do you have any medical condition, injury (for example hearing difficulties) or any other factor that could affect your ability to undertake, or be aggravated by this business, or your employment in general? Yes No

If Yes, please give details: _____

Are there any other factors that may inhibit your performance as a franchisee? (e.g. health considerations, other commitments) Yes No

If Yes, please give details: _____

What are your hobbies/memberships, sports, community activities and outside interests? _____

Have you, within the last ten years, been charged with a criminal offence, or had any other criminal convictions in New Zealand or overseas? Note: This includes minor offence for which 'Diversion' was imposed. Yes No

If yes, please state the details: _____

Have you in the last ten years, had your employment terminated as a result of an employer taking disciplinary action against you? Yes No

If yes, please state the details: _____

Do you have any prior obligations which may require your absence from the **Marketing Stem** Franchise? (e.g. pre-booked holiday, NZ Armed Forces, Study, Secondary Employment) Yes No

If yes, please state the details: _____



EDUCATION DETAILS (plus attach Curriculum Vitae if prepared)

Year Qualification Attained	Course Type/Detail	Name of Institution Fully Completed and Passed Yes/No
_____	_____	_____
_____	_____	_____
_____	_____	_____

List any other educational qualifications achieved or courses undertaken which you feel may be relevant to determine your suitability as a Franchisee:

BUSINESS EXPERIENCE (Please list your business experience – starting with your most recent)

Period: From: _____ To: _____ Position: _____

Company Name: _____ Type of Business: _____

Responsibilities: _____

Major achievements: _____

Period: From: _____ To: _____ Position: _____

Company Name: _____ Type of Business: _____

Responsibilities: _____

Major achievements: _____

Period: From: _____ To: _____ Position: _____

Company Name: _____ Type of Business: _____

Responsibilities: _____

Major achievements: _____

Have you ever owned a business? Yes No If yes, what type? _____

Have you ever owned a franchise? Yes No If yes, what type? _____

Other Business Affiliations (Director, Partner, etc): _____

If I am successful in obtaining a Marketing Stem Franchise the following will apply: Franchise Training: I understand that I need to commit to the Marketing Stem Training & Induction Programme and to attend regular meetings and training _____ Yes



PERSONAL FINANCIAL STATEMENT

Present Annual Wage/Gross income: \$ _____
 Household Income (if more than one earner): \$ _____

Current Assets

Cash on hand and in banks \$ _____
 Investments \$ _____
 House Government Valuation \$ _____
 Equity in businesses \$ _____
 Automobiles \$ _____
 Shares \$ _____
 Personal Effects \$ _____
 Debtors \$ _____
 Other assets \$ _____
Total Assets \$ _____

Current Liabilities

Loans payable to bank \$ _____
 Bills due, creditors \$ _____
 Real estate mortgages \$ _____
 Personal Loans \$ _____
 Hire Purchases \$ _____
 Overdraft \$ _____
 Taxation \$ _____
 Credit cards \$ _____
 Other debts \$ _____
Total Liabilities \$ _____

BUSINESS ASPIRATIONS

Where did you hear about us? _____

What appeals to you about this business and why are you seeking to become a Marketing Stem Franchisee? _____

How soon would you like to be in business? Within 2 months? Within 4 months? Other: _____

Please indicate your preference for a Franchise territory: _____

What are your reasons for going into your own business? _____

Do you plan to devote yourself full time to this franchise? Yes No Cash available to invest? \$ _____

Other sources of capital you plan to use to establish your business franchise: _____

Will the franchise be your sole source of income? Yes No If No, describe other sources of income: _____

Have you ever failed in business, compromised creditors or been declared bankrupt? Yes No If "Yes" where, when and the circumstances and any remaining liabilities? _____



INDIVIDUAL, PARTNER OR COMPANY?

Are you applying as: An individual A Partnership A Company A separate Request for Consideration is required from all partners and shareholders.

If a Partnership, please give name(s): _____

Do you have, or plan to have, a financial partner of partners? Yes No

If yes, please give details: _____

Partners name(s): _____ Partner's relationship to applicant: _____

Contact address: _____

Contact telephone numbers: _____

Is there any reason that you know of that might preclude you or your partner(s) from purchasing a Marketing Stem Franchise (eg. Restraint of Trade)

Yes No If Yes, please give details: _____

If you plan to enter into a Franchise Agreement as a Limited Company please provide the following information

Company Name: _____ Incorporation Number: _____

Registered business address: _____

Name and address of all directors: _____

Is the Company a Trustee Company? Yes No If Yes, name and type of trustee: _____

Does the Company have audited financial statements for the past two years? Yes No

PERSONAL REFERENCES

While we will be contacting your references to assist us, we will not disclose the nature of your intended proposition.

Name: _____ Address: _____

Phone: _____ Occupation: _____ Years known: _____

Name: _____ Address: _____

Phone: _____ Occupation: _____ Years known: _____

Additional information or comments that you want to share with us in evaluating your suitability: _____



FINANCIAL REFERENCE

Name: _____ Address: _____
 Phone: _____ Nature of business transacted: _____
 Name: _____ Address: _____
 Phone: _____ Nature of business transacted: _____

SOLICITOR

Name: _____ Firms Name: _____ Phone: _____
 Address: _____

ACCOUNTANT

Name: _____ Firms Name: _____ Phone: _____
 Address: _____

BANK

Contact: _____ Bank/Branch: _____ Phone: _____
 Address: _____

Please list any questions you have of this franchise opportunity: _____

PLEASE READ AND SIGN THE FOLLOWING STATEMENT

I, the undersigned, understand that in signing this form, I am not legally obligated to uplift any Franchise and that the information supplied by me is confidential for the purposes of assessing my desirability and qualifications as a potential Franchisee. I undersigned certifies that the above information and financial details provided are true and correct and understands that references and previous employers may be contacted. I authorise Marketing Stem to seek and obtain relevant credit information in line with the Privacy Act. This includes authorisation for Marketing Stem to obtain from a credit reporting agency a credit report containing personal credit and/or my commercial activities. I understand and consent that credit information about me permissible under the Privacy Act may be given by Marketing Stem to a credit reporting agency or other credit providers.

To this Request for Consideration I have attached: Curriculum Vitae Recent Photo Written References

I authorise any person or company to provide you with such information as you may require in response to your enquires for you to consider this Request for Consideration. I authorise you to furnish to any third party details of this form and any subsequent dealings that I may have with you as a result of this form being actioned by you, and to use for lawful purpose connected with your business any information which I or any third party may provide you. We advise that under the Privacy Act you have certain rights of access to and correction of personal information.

Signature: _____ Name: _____ Dated: _____
 Signature: _____ Name: _____ Dated: _____

