

COGstrategy[®]

BUSINESS & BRAND DEVELOPMENT

Case Study – Taren Point Bowling Club



DISCOVER



THE COG STRATEGY APPROACH TO BUSINESS DEVELOPMENT

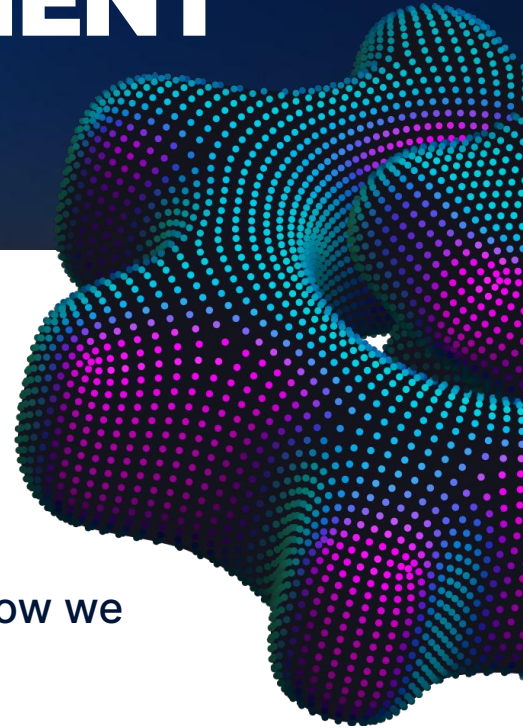


This document will introduce you to one of the COG Strategy Brand and Business Development projects as a simple case study.

It supports our work experience and provides some insight to how we connect brand to business and provide value in our brand and marketing services.

Read through, enjoy, and get in touch anytime!

START!







WHAT WE KNEW FROM THE START

Taren Point Bowling Club approached COG Strategy with a brief to audit the brand and marketing communications of the business, and also the technology that was used to manage members, guests and general operations.

The proposed brief from Taren Point Bowling Club would include workshops and discovery sessions that would result in formal is a measure of a brands performance against key business objectives and evaluates industry presence.

The Taren Point Bowling Club brand was a clumsy and fragmented finance entity that had little structure or brand management systems in place.

With a diluted brand across numerous market sectors and a large spread geographically, there was to be a broader review to understand the equity that was currently in play prior to any updates to key brand touchpoints. Ideally to ascertain the amount of brand fragmentation and performance metrics of brand assets.

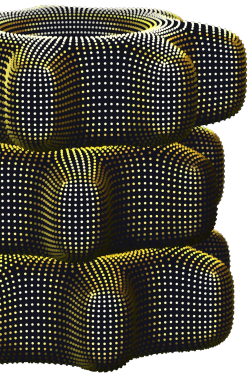


ABOUT THE CLIENT

Located in the heart of the Sutherland Shire, Taren Point Bowling Club is a locals favourite, a fantastic entertainment venue and Bowls NSW Club of the Year.

The club boasts beautifully manicured bowling greens and fantastic facilities with a relaxed, friendly and intimate atmosphere. You can enjoy the great food and refreshments from the Bistro and Bar while relaxing in our fantastic indoor and outdoor spaces and newly created areas.

Members of Taren Point Bowling Club and their guests enjoy excellent bowling facilities and club camaraderie. The From 1950 until the present Taren Point has and will always welcome anyone that wants to join the Taren Point family.





Whilst we don't want to explicitly call out Taren Point Bowling Club as an antidote to social isolation, it is something to consider when developing the brand positioning; we have an opportunity to support people

FROM THE CLIENT

“When our business reached a point of needing to digitize and change our operations from analogue to a more sophisticated digital approach, COG Branding seemed like the most logical choice as their service suite and experience made it easy for our Board to clearly see how a partnership with COG could be beneficial across numerous brand, marketing, technology and business development areas – all elements that we needed to address.”

- [Tim Wolfe](#)
General Manager



BRAND INVENTORY

Mission And Vision

At Fiducian we believe that integrity, Trust and Expertise are the cornerstones of our organisation, entrusted to build wealth for clients. Across the business, we ensure that everything we do encapsulates these qualities. Through these values we aim to build long term relationships based on mutual trust with clients.

The company logo of a lion symbolises Strength, Character and Security – characteristics which sit well with the integrity, Trust and Expertise associated with the meaning of the Fiducian name. It is therefore, within the context of working in a fiduciary market and with high transparency, that Fiducian provides financial services for the benefit of clients, investors, staff and shareholders. It is a principle that Fiducian has a high level of integrity and makes a point of ensuring all Fiducian Group members.

Key Statements

Integrity, Trust and Expertise
Build Wealth For Clients
Build Long Term Relationships Based On Mutual Trust
Strength, Character and Security
Provides Financial Services For The Benefit Of Clients, Investors, Staff And Shareholders

SCORECARD SUMMARY

Branding Dimensions	Level
Brand Strategy	2.3/5.0
Brand Alignment	2.2/5.0
Brand Strategy	1.3/5.0
Brand Strategy	2.5/5.0
Weighted Average	1.8/5.0

COMPETITOR ANALYSIS

The Fiducian Group faces a staggering amount of competition both directly and indirectly, given its market share across multiple financial market sectors.

A very wide offering of products and multiple brand extensions place The Fiducian Group competitively in industries involving Wealth Management, Financial Planning, Funds Management, Superannuation, Asset Services and Business Advisors (BSA, BSC).

The Fiducian Group's direct and indirect competition are a mix of blue chip, independent and franchise businesses.

There are over 18,000 financial advisers in Australia. These advisers work for 749 advisory groups (operating via 8000 financial planning practices).

The most common method for the industry to provide advice is via a mix of the 180 dealer groups in Australia.

Around 85% of financial advisers (that is, more than 15,000 of the 18,000 in total advisors) are associated with product manufacturers in one way or another. The advisor works with the dealer group and uses the dealer's support services, and/or the advisor is directly employed as an authorised representative under the corporate entity's Australian Financial Service License (AFSL).

COMPETITOR ANALYSIS

Financial advisers that only around 5,000 (28,000 was 15,000) financial advisers in Australia are not associated with product manufacturers (that is key 15-17% of advisers).

A total 184 out of the financial advisers in Australia are selling product other than merely providing financial advice - operating as sales-based or transaction professionals.

Financial planners with 250+ advisers are considered a premium competitor and are ANZ, CBA, NAB, ANZ, Westpac / BT, QICF, Morgan, Centric Wealth, SMF Advisors Network, Sydney, Dover, Bell Potter Securities and GR Wealth.

Financial planners with 50 to 249 advisers are considered an immediate competitor and fit around 150 companies that comprise over 5,000 financial planners.

Finally, there are hundreds of companies that employ 1 to 49 financial advisers (approximately 6,500 financial planners in total) that can be considered indirect competitors.

Financed by employed financial advisers, The Fiducian Group with approximately 62 advisers sits in the upper half of the mid or against average.



THE COG STRATEGY BUSINESS DEVELOPMENT SERVICES IN THIS PROJECT.

GOAL DEFINING

We establish specific goals for business development projects. It's important for us to then link these goals closely to business objectives to reflect best practices, the company's vision, and its mission statements.

KNOW THE AUDIENCE

Central to any successful business development project with strategic deliverables is delivering the right message to the right person at the right time - with the right tools. Here we research to discover insights that underpin the strategy going forward.

CREATE STRATEGIES

To achieve the desired outcome, we define a clear strategy, based on our clients goals and the audience. This allows us to build detailed and measurable actions in a number of different ways.

CONFIRM

When the brand, marketing, communication and business strategies have been established and agreed on, the tactics for execution are discussed. The delivery team adds the actions, dates, and names of key stakeholders responsible for each against a clear and measurable plan.

REVIEW

Measurable deliveries with clear due dates make it easy to monitor progress. But things change and we anticipate bottlenecks and delays. Delivery team members are encouraged to provide input and feedback as we implement the programs.



MAIN CHALLENGES

Whether you are starting your first project or have a lot of experience, one thing is for certain nothing that is worth doing is easy, nor is it meant to be.

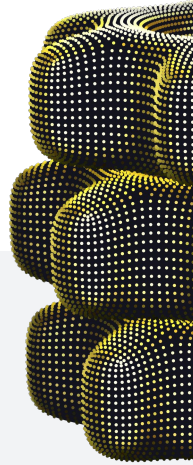
All projects have challenges and people really rely on COG Strategy for our astute and confident project management.

Our team proactively engages with our clients during the project planning phase to ensure we meet the exact requirements as well as understand the expectations.

- **Auditing a heavily fragmented brand.**
- **Developing a brand that is disconnected from the broader business.**
- **Implementing strategies during BAU.**



BRIEF SUMMARY



Taren Point Bowling Club had experienced volatility during the pandemic and had not pivoted their business strategy during this time. Emerging from the pandemic restrictions and operating environment the brand and business needed to address brand and business development, and at the same time overhaul and include strategy and processes while maintaining business as usual.

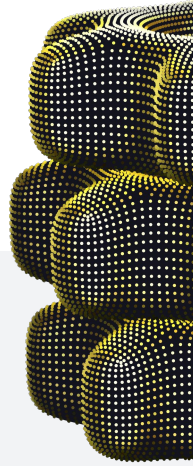
COG Branding inherited a legacy of very little brand intelligence and some analogue and basic brand management systems and processes. COG Branding's focus was to understand the business case, and what sort of growth would be expected and the internal resources of the business before we looked to implement any new systems, technologies or strategies.

COG Branding's job was to ensure Taren Point Bowling Club were set up for as little disruption to their BAU as possible, a key part of the brief would be to support the General Manager in their objectives and vision to allow the business to begin performing post-Pandemic.

Taren Point Bowling Club is a typical Clubs NSW industry business which follows standard rules and regulations, thus COG Branding strategies needed to conform to this environment.



SOLUTIONS SUMMARY



Taren Point Bowling Club Business Development solutions initially commenced with a series of workshops with senior stakeholders to deep dive into their industry to discover insights, and what they know to be true for their business and brand. COG Branding understand that our clients are often experts in their industry and business – they simply need assistance in directing the correct solutions through the right channels.

A broader business development case allowed COG Branding to create some key foundations to key areas, and to establish brand and marketing communications pillars where there were none.

Insight: Within the research there is always golden nuggets of truth and actuals the form the core decision making and planning for future strategy works. With core insights we're able to provide solutions that are appropriate, commercially viable and meet customer and market expectations.

Framework, Strategies, Planners: Our strategy work is delivered to ensure our clients can autonomously manage and drive the plan through the business without COG Strategy needing to implement every step of the way. Our work is value focused and we know we need to build intelligence client side.

Launch, Roll Out, Execute, Nurture: With frameworks and strategies delivered, the deployment and integration of these into the broader business starts to take place.

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Focus on
community;
colloquial language

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BRAND EXPLORATORY



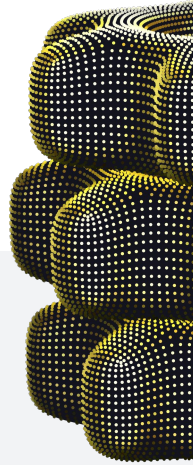
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COMPETITIVE ANALYSIS





RESULTS SUMMARY



Taren Point Bowling Club now manages a marketing communications strategy that is circulated within the business senior management and marketing team as a plan that ensures strategic communication takes place with their targeted audience.

The Taren Point Bowling Club brand and business strategies assisted the business to define the communication objectives, refine the audience and articulate the brand messages to clients, customers and team members.

The Business Development project included brand management frameworks that clearly define who Taren Point Bowling Club should be talking to (both employees and customers), clarification on why the business is wanting to talk to them, how and when Taren Point Bowling Club will deploy marketing campaigns, and a rationale on media type and advertising budget.

The discoveries made within the Taren Point Bowling Club Business Development project delivered key research and insight which offered COG Branding client a dashboard of current business and brand information, and as per the initial brief was able to then be rolled into other projects such as [digital marketing](#) workflows and website technology upgrades.





**WE'VE DELIVERED PROJECT SUCCESS
FOR COMPANIES THAT YOU KNOW.**

**BUT WE'RE SMALL BUSINESS
SPECIALISTS READY FOR NEW
PARTNERSHIPS.**



CLAIM YOUR FREE 30-MINUTE BRIEFING SESSION

Getting results like this case study is only a phone call away.

If you're serious about dominating your market and maximizing — down to the last dollar — your branding ROI, you must step up and take brand marketing seriously.

If you have any questions, or would like our help on implementing the type of strategy we've presented here take advantage of our free 30-minute strategy session where we'll discuss your business goals and challenges.

Please note this is not a sales call. You will be speaking with one of our highly experienced marketing experts, not a salesman.

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BECOME A COG CLIENT TODAY. ACHIEVE GROWTH AND SUCCESS WITH A RELIABLE PARTNER.



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