

Integrus- Customer Care Checklist – The Essentials.

At Integrus Global, we are passionate about the success of our clients. Successful business owners understand that each business should be protected and set up for success. The list below outlines what we believe to be the essential areas all companies should have covered. At the very least, all businesses must be aware of these areas, which is best done by speaking to a relevant professional. We have recommended experts that we work with regularly. These contacts are vetted to share the same values as we do. If you want to speak to our expert, please tick the box marked “Introduce me to an expert.”

We recommend that all our clients consider these questions	How it protects you and supports your success.	Introduce me to an expert	I already have this covered
Do you have a Lasting Power of Attorney (LPA)?	A businessperson should have a Lasting Power of Attorney (LPA) to ensure that their financial and business affairs can be managed seamlessly, safeguarding their enterprise's continuity in the event of incapacity.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a shareholder or partnership Agreement?	Businesspeople should have a shareholder agreement to protect their investment, regulate decision-making, and effectively manage potential shareholder conflicts.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have suitable Commercial Insurance?	Businesspeople should have commercial insurance to protect their investments from unforeseen losses or liabilities, ensuring their enterprise's stability and longevity.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have Professional indemnity insurance?	A businessperson should have professional indemnity insurance because it provides financial protection against potential claims for errors, omissions, or professional negligence in delivering their services.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have employees? Do they have Employment contracts?	A businessperson should have employment contracts to clearly define obligations, protect legal rights, and ensure mutual understanding between the employer and the employee.	<input type="checkbox"/>	<input type="checkbox"/>
Do you engage with proactive Tax planning?	Tax planning is crucial for a businessperson as it helps optimise financial efficiency, ensure legal compliance, and potentially increase profit margins by minimising tax liabilities.	<input type="checkbox"/>	<input type="checkbox"/>
Do you regularly review your Pension Planning?	Pension planning ensures a businessperson's financial security in retirement, allowing them to maintain their lifestyle even after stepping away from active business operations.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a Professional email address and website URL? (Not Hotmail, Gmail or Yahoo)	A professional email address and URL underscore credibility, promote brand consistency, and foster client trust, enhancing the overall business image and professionalism.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a brand identity and logo pack?	Strong visual identity, branding, and a consistent theme for customer-facing materials will strengthen and differentiate your market presence, build trust, and attract and retain loyal customers. A designer is essential for this.	<input type="checkbox"/>	<input type="checkbox"/>
Is your accountant proactive, and do they provide you with management reports?	A proactive accountant and management accounts are essential for a businessperson. They provide accurate financial insights, enabling timely decision-making, optimising costs, and fostering sustainable growth.	<input type="checkbox"/>	<input type="checkbox"/>

Integrus- Customer Care Checklist – Additional Success Areas.

Our passion extends beyond the essentials. For businesses to succeed, you must create a support team of experts over time. It is worth meeting with these experts and getting to know them before you need them. When the time is right, they can provide you with profit-boosting services.

We recommend that all our clients speak to these people	How does it boost the profit of your business?	Introduce me to an expert	I already have this covered
A PR Consultant	A PR Consultant can amplify a small business's profits by strategically shaping public perception, fostering brand recognition, and driving customer engagement through effective communication strategies.	<input type="checkbox"/>	<input type="checkbox"/>
Social Media Consultant	A Social Media Consultant can boost the profit of a small business by leveraging targeted online strategies to increase brand visibility, engage with potential customers, and stimulate higher sales conversions.	<input type="checkbox"/>	<input type="checkbox"/>
A Life Coach	A Life Coach can enhance the profitability of a small business by fostering personal growth and emotional resilience among its workforce, which enhances productivity and innovation. In contrast, a Business Coach focuses primarily on refining business strategies, optimising operational efficiency, and improving market competitiveness.	<input type="checkbox"/>	<input type="checkbox"/>
A Personal Image Consultant	A personal image consultant will work with you to create a strong, distinctive personal brand identity that engages and retains more customers.	<input type="checkbox"/>	<input type="checkbox"/>
Flexible Virtual Admin Support	A Virtual Assistant can boost the profit of a small business by streamlining administrative tasks, enabling more focus on revenue-generating activities and customer engagement.	<input type="checkbox"/>	<input type="checkbox"/>
The support of 3 different peer Networks. e.g. BNI, Chamber of Commerce and a trade body specific to your trade or profession.	Different networks present distinct opportunities. One might be great for learning and professional development, another for generating referrals, and a third for building close-knit, supportive relationships. Being part of three networks triples your growth, collaboration, and success potential.	<input type="checkbox"/>	<input type="checkbox"/>
A Copywriting Expert	A copywriting expert can significantly boost a business's profits by meticulously crafting compelling and persuasive content that stimulates interest and curiosity. They highlight the unique value proposition of a product or service, effectively influencing purchasing decisions.	<input type="checkbox"/>	<input type="checkbox"/>
Professional IT Support Services	Professional IT Support Services can boost profits by enhancing operational efficiency, reducing downtime, and facilitating a seamless digital customer experience.	<input type="checkbox"/>	<input type="checkbox"/>
Professional Photography for use in your promotion work.	A professional photographer can significantly boost a business's profits by capturing high-quality, engaging images that elevate brand aesthetics, attract customers, and enhance marketing strategies. This further enhances your personal and business brands	<input type="checkbox"/>	<input type="checkbox"/>
A Marketing Consultant responsible for Marketing Strategy.	A marketing consultant uses strategic analysis to identify untapped market segments, optimise advertising efforts, and enhance brand positioning, boosting the business's profitability.	<input type="checkbox"/>	<input type="checkbox"/>