

How the BEAT Report gave one broker the insights she needed to help shape her long term business plan.

PLAN Australia's BEAT Report gave Gold Coast broker Holly Bertsos customised insights to help shape her long term business plan.

"Sometimes you can get too busy working in the business, rather than on it," says Gold-Coast broker Holly Bertsos.

Ms Bertsos first heard about BEAT at a PLAN Australia PD Day and, with the help and encouragement of her BDM, she decided to give it a go.

"I wasn't expecting such a detailed report. It highlighted a raft of strengths and weaknesses ranked from poor to super-fit, which gave me very specific goals to help shape my business plan," she says.

These goals included moving her home-based business into an office, recruiting more staff and having more stringent financial management processes in place.

"I have now moved to a larger office space and recruited two full-time staff members. The tool also opened my eyes to important longer term things such as succession planning, which I hadn't really thought about before," she says.

The time her BDM took to go through the findings gave a useful comparison around how she was tracking against other broker businesses, she says.

"At the time, like many others, I operated as a lone ranger. Having an external party give a benchmark as to how the business was going made a real difference."