



ASISA

ENTERPRISE AND
SUPPLIER DEVELOPMENT

ASISA PROGRAMME INFORMATION SHARING SESSION

Subtitle

Date: 16 MARCH 2023

AGENDA



1. Introduction and background
2. Programme in action
3. SME reflections
4. Mentorship-what to expect?



01

INTRODUCTION AND BACKGROUND

Subtitle



BACKGROUND AND PURPOSE



INSETA Intermediary Development Programme aims to support the growth and development of black owned SMEs brokerages of the insurance sector and related sub-sectors in order to expand the pool of scarce and critical skills as well as address the issues of sustainability facing the sub-sector. We aim to achieve this by supporting the development of brokers to create maximum shared value for industry brokers and society as well as ensuring the growth and sustainability of brokers by providing best practice business development support.

The programme reaffirms INSETA's commitment to promote meaningful transformation by developing high-growth potential brokerages with the ability to leave lasting impact, and we'd love for you to be part of it.

PROGRAMME SCOPE



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DIAGNOSE

- Provide Intermediaries with a diagnostic to highlight key business strengths and weaknesses
- Interpret diagnostic outcomes in practical and easy to understand language
- Highlight areas that need urgent attention to help Intermediaries prioritise their actions



SUPPORT

- Provide support to additional Intermediaries who are not necessarily business owners
- Provide Intermediaries with relevant and topical information, tools, templates and know how to solve business challenges
- Provide platforms for group learning, sharing and networking
- Leverage group gatherings to zoom into relevant business support and build a sustainable entrepreneur community for sustainable support



EVALUATE

- Evaluate Intermediaries ability to implement interventions based on support provided
- Intermediary engagement
- Gather key pilot insights that can be leveraged when designing future high reach programmes

PROGRAMME PILLARS



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Diagnostics

- Business **diagnostic** that uncovers business strengths and weakness
- Provides **advice** on how to solve some of the business shortcomings
- Provides links to free or **inexpensive resources** to assist the business to solve some of their challenges
- Gives an indication on how we **group cohorts**
- Panel to examine each application to determine **fit to programme**



Webinars

- Monthly bootcamp **webinars**
- Ensures that there is **common understanding**
- Engagements with **specialists**
- Each cohort will have its **own set of bootcamps when necessary** to ensure we are addressing their business development needs
- Supported with **business burst emails** with additional resources



Coffee chats

- Industry-related news led by an **industry specialist**
- **Transformation leadership** conversations
- Coffee chats on **topical issues**
- Serve as '**specialist projects**'
- Frequency: **every 6 weeks**
- Duration: **90 -120 mins**
- Invite successful IFAs to share '**secrets to the success**'



Check-in Council

- Monthly **group entrepreneur sessions**
- Chaired by the **mentor**
- Aim at solving **group-wide issues**
- Aim is to provide a **sustainable support** structure
- Introducing a **mentor hotline**: one-on- one quick huddle with mentor. 1 hour per month, per person
- Creating a sense of **community** and **accountability**

The combination of these four pillars, supported by telephonic mentorship support can be used to replicate impact

02

PROGRAMME IN ACTION

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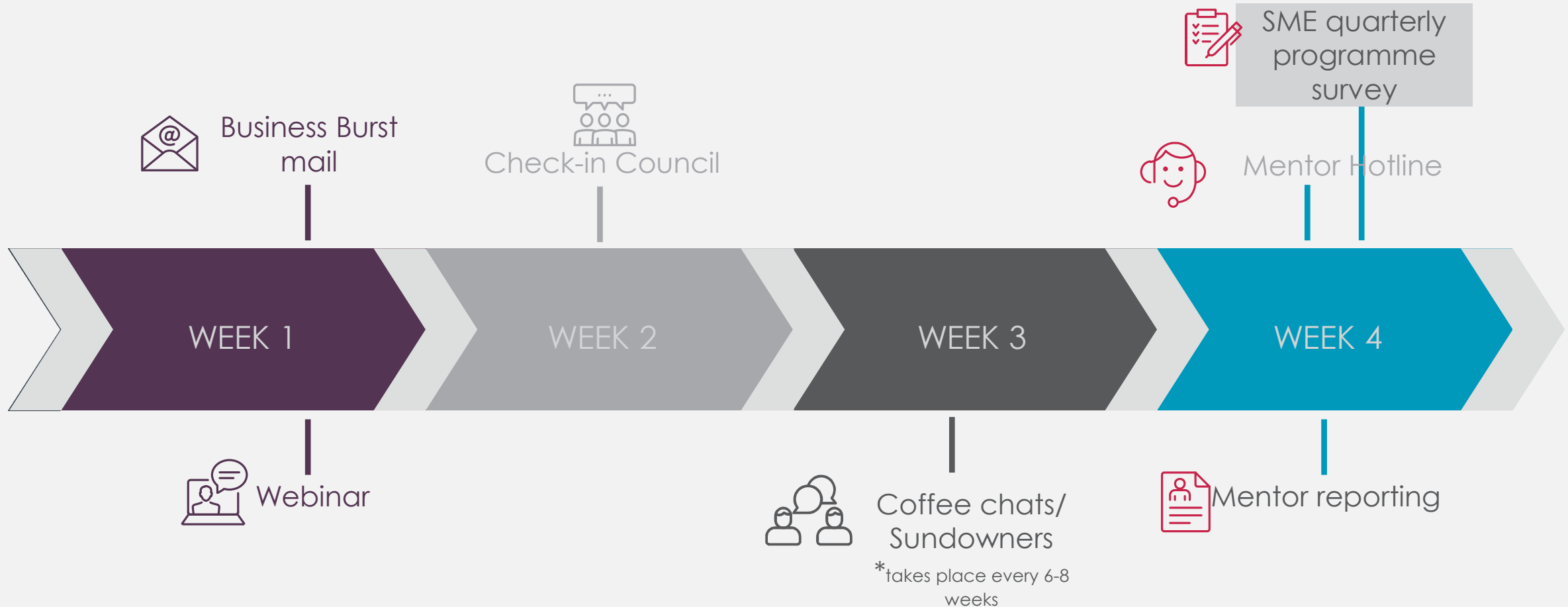


MONTHLY PROGRAMME ACTIVITIES



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03

SELECTION PROCESS OVERVIEW

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DIGITISED SELECTION



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The selection and diagnostic process is captured and managed on a customised programme delivery digital platform that allows for a faster process with high levels of analytics. The tool is important when dealing with large sourcing pools.

2. Diagnostic Analysis

Sales

24%

The ability to generate adequate revenue is one of the cornerstones of any business. A combination of competencies including a defined value proposition, customer targeting and segmentation, branding and a systematic sales process are needed for any business to be sustainable.

Your score:

Your score suggest that this is an area that requires detailed attention to assist your business to generate sustainable revenue.

Action plan:

To improve your business' ability to generate revenue, please pay attention to the following segments of the SALES business pillar:

- Customer Segmentation 36%
- Branding 55%
- Marketing -7%
- Selling 37%

Tools & Resources

We have collated the following useful tools and resources, videos and articles to assist you to improve aspects of this important business pillar.

Click [here](#) to access the tools

Operations

35%

Everyone who starts an entrepreneurial venture wants to be successful. However, success does not happen overnight, and it is not guaranteed. To ensure an efficient and smooth-running operations, you need ensure:

- There is an enabling environment for your team,
- Your tools, equipment, and IT infrastructure are properly maintained and insured
- The working processes are adequately outlined and define, and
- Your business complies with the rules and regulations of the jurisdiction you operate in.

Your score:

Congratulations! Your score reflects your effort in implementing several initiatives to improve your ability to manage your business' operations.

Action plan:

To improve your ability to manage your business' day-to-day operations, pay attention to the following segments of the OPERATIONS business pillar:

- Capacity Planning 55%
- Compliance and Governance 42%
- Business Risks 36%
- Equipment and Hardware 0%

Tools and Resources

We have collated the following useful tools and resources, videos and articles to assist you to improve aspects of this important business pillar.

Click [here](#) to access the tools.

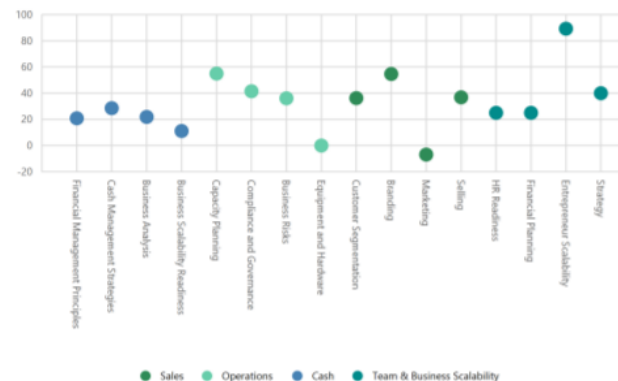
Batubatsi Investment Brokers Diagnostic



Business Owner(s): Sanana Moshesha (Principal)
 Age Group: Under 30 years
 Registration Number: 20362
 Industry: Business and Financial Services
 Years in business: 17
 Office Location: 4 Cullinan St, Sharon Park, Nigel, 1498, South Africa
 Website: www.batubatsi.solutions
 Email Address: batubatsisolutions@gmail.com
 % Black Ownership: 100.00%
 Core prod. / service: Long Term Insurance
 Turnover in past 12 months: R250,000.00
 Net profit in past 12 months: R95,000.00
 Full-time staff headcount: 1
 Part-time staff headcount: 0

1. Diagnostic Score Summary

Sales	Operations	Cash	Team & Business Scalability	Overall Score
24%	35%	20%	43%	31%

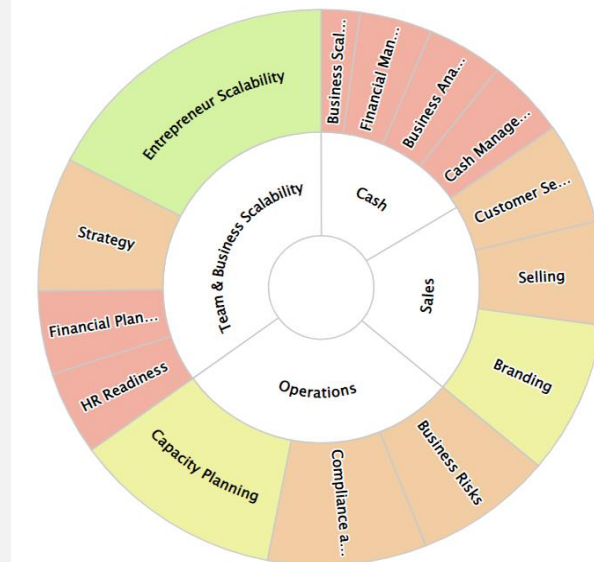


Analysis

Pre Diagnostic

All Answers

You scored 31%





A report is generated and sent to entrepreneurs with suggested articles, videos, tools and templates

Diagnostic Support

SALES BUSINESS PILLAR




Brand & Marketing

Brand management is a function of marketing (*Marketing refers to activities a company undertakes to promote the buying or selling of a product or service*) that uses techniques to increase the perceived value of a product line or brand over time. Effective brand management enables the price of products to go up and builds loyal customers through positive brand associations and images or a strong awareness of the brand.

We have curated articles and free resources that can assist your business to make better use of Brand & Marketing:




 Articles	 Videos	 Tools and templates
Branding Insights <ul style="list-style-type: none">• Navigating the Sales Process (Guide)• The Psychology of Selling• What is a CRM Cycle?	Branding Explained <ul style="list-style-type: none">• How to give a perfect pitch• Science of Persuasion• How to Win Friends and Influence People	FREE Branding Tools <ul style="list-style-type: none">• How to build a brand• Brand audit checklist• Marketing plan template• Canva (tool for creating visual elements to help promote your brand)


Customer Relationship Management



CRM (Customer Relationship Management) is a system that helps you manage your relationship with your customers. A CRM system provides owners, sales and marketing teams with a way to manage the entire sales and funnel, from lead qualification to opportunity management. The system allows the sales to function to migrate from an ad hoc process to systemised sales process.

We have curated articles and free resources that can assist your business to make better use of CRM systems:

 Articles	 Videos	 Tools and templates
CRM Insights <ul style="list-style-type: none">• CRM Done Right (Harvard Business)• Five ways CRM can help (Deloitte)• What is a CRM Cycle?	CRM Explained <ul style="list-style-type: none">• The 2-Minute Guide to CRM (2 mins)• A guide to CRM (6mins)• Building relationships (15mins)	Financial Planning CRM Tools <ul style="list-style-type: none">• atwork• Xplan• EliteWeath





A report is generated and sent to entrepreneurs with suggested articles, videos, tools and templates

2. Diagnostic Analysis

Sales

40%

The ability to generate adequate revenue is one of the cornerstones of any business. A combination of competencies including a defined value proposition, customer targeting and segmentation, branding and a systematic sales process are needed for any business to be sustainable.

Your score:

Congratulations! Your score reflects your effort in implementing a number of initiatives to improve your business' ability to generate sustainable revenue.

Action Plan:

Please pay attention to the following areas of the Sales business pillar

- Customer Segmentation 38%
- Branding 31%
- Marketing 41%
- Selling 44%

Tools & Resources

We have collated the following useful tools and resources, videos and articles to assist you to improve aspects of this important business pillar.

Click [here](#) to access the tools.

04

PROGRAMME IN ACTION

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Programme Structure & Phases

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Programme
Phase



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Purpose	To assist IFAs to understand diagnostic outcomes and start planning interventions to close gaps	Inspire IFAs to look at their current sales process, review of collateral and use of formal sales system	Introduce IFAs to best practices on good practice, compliance and financial management	To assist the business to grow by means of the use of tech, leadership, funding
Month	• Month 1-2	• Month 3- 4	• Month 5- 7	• Month 8 - 9
Email Bursts Content	<ul style="list-style-type: none"> • Diagnostic interpretation • Wellness diagnostic • The client journey/experience 	<ul style="list-style-type: none"> • Secrets to successful online engagements • Setting appointments • Handling appointment cancellations 	<ul style="list-style-type: none"> • Managing staff at a distance • Is the office necessary anymore? • The future of Financial Planning 	<ul style="list-style-type: none"> • TBA
Throughout the programme, emails burst will include wellness themes to minimise impact of stress and avoid burnout				
Webinar	<ul style="list-style-type: none"> • Business development 	<ul style="list-style-type: none"> • Connect for success: Sales process • Improving on-going process 	<ul style="list-style-type: none"> • Compliance • Financial management • Power of the People Agenda 	<ul style="list-style-type: none"> • Scaling your business for growth • TBA-Personal development
Check-in Council	<ul style="list-style-type: none"> • Business development in practice • Problem solving 	<ul style="list-style-type: none"> • Entrenching the sales process • Challenge your thinking around the reality and challenges of your business 	<ul style="list-style-type: none"> • Unpacking what it takes to build a good practice • Compliance discussion • People Agenda 	<ul style="list-style-type: none"> • Mentor led discussion discussing practical solutions and additional insights
Coffee Chats	<ul style="list-style-type: none"> • A high impact, low cost financial advisory practice • Wellness survey 	<ul style="list-style-type: none"> • How to use technology for sales and marketing • TBA for Improving on-going process 	<ul style="list-style-type: none"> • RDR • Financial literacy/Funding • Leadership 	<ul style="list-style-type: none"> • Future Proofing-How to employ AI in business practices.
Toolkits	<ul style="list-style-type: none"> • Business development template 	<ul style="list-style-type: none"> • Free behavioural profiling test • Free branding resources • Sales management toolkit • Pitching deck resources 	<ul style="list-style-type: none"> • Risk analysis templates • Cashflow forecast templates • Culture code resource • Team engagement survey • Funding resources • Team profiling tool 	<ul style="list-style-type: none"> • TBA

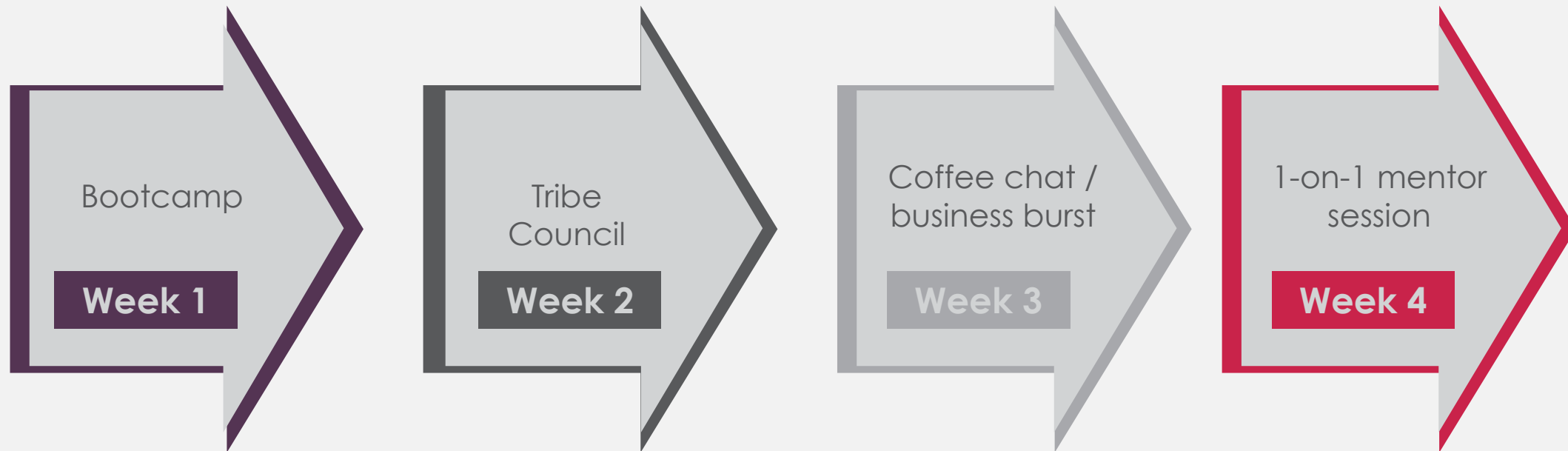
FLOW OF THE PROGRAMME



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A time commitment of about two days per month is required for all these activities

EDGE PORTAL PLATFORM

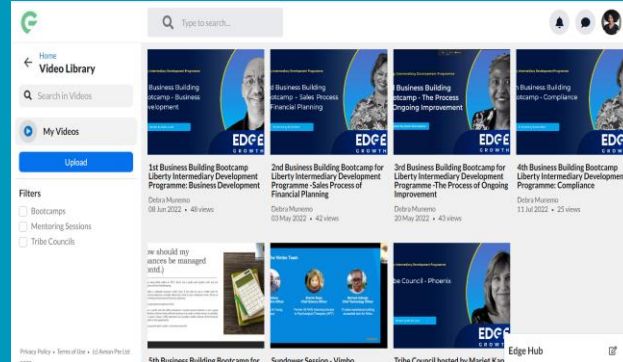


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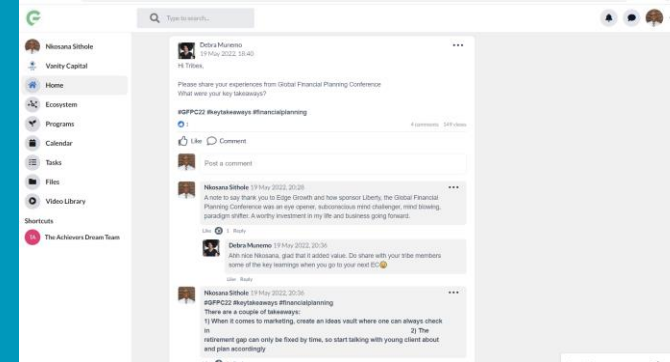
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Programme will be run on the Edge Portal

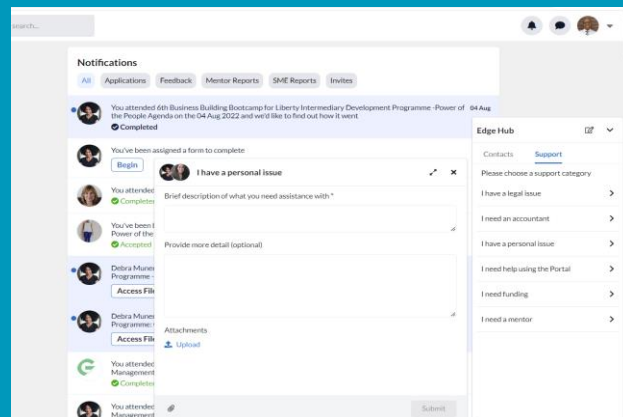
Video library



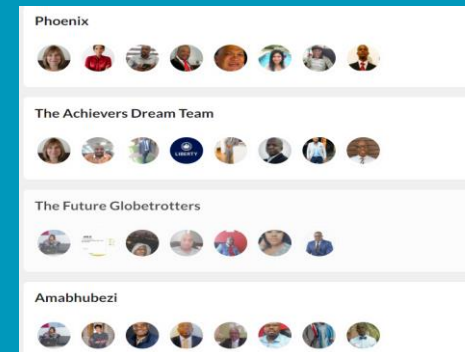
Enhanced News Reels



Edge Hub



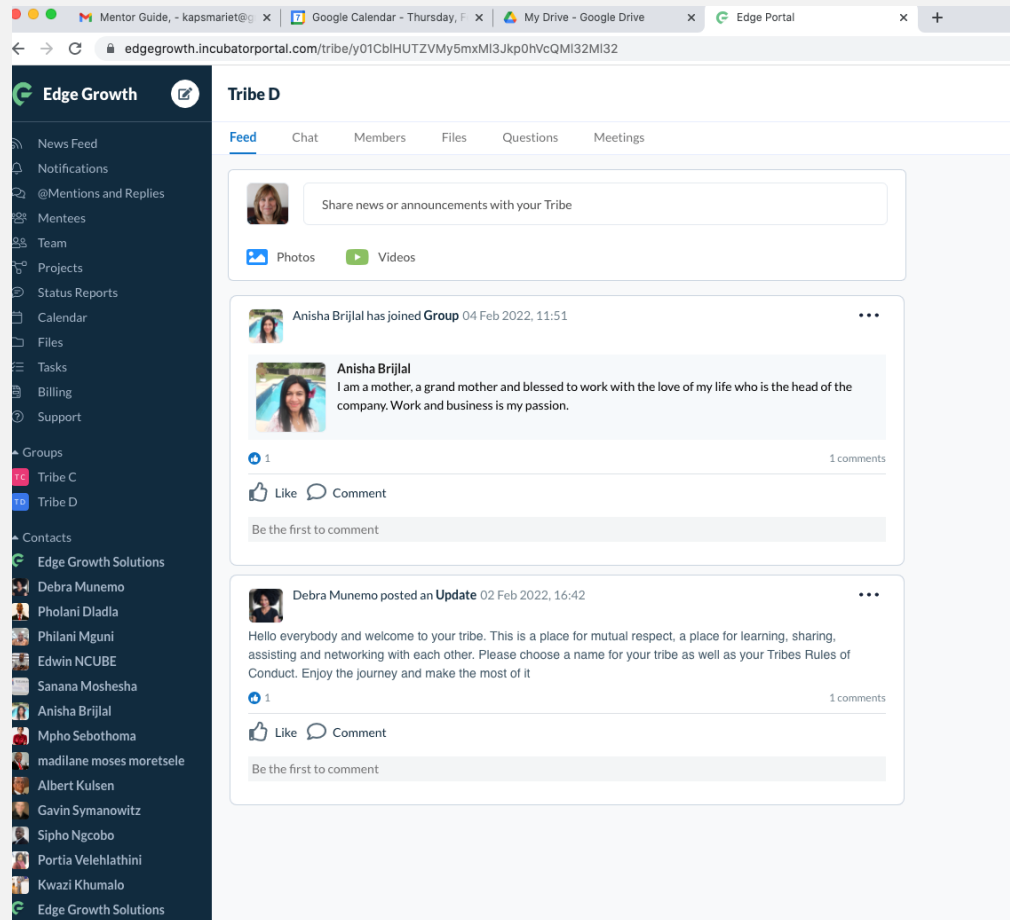
Entrepreneurial Tribes



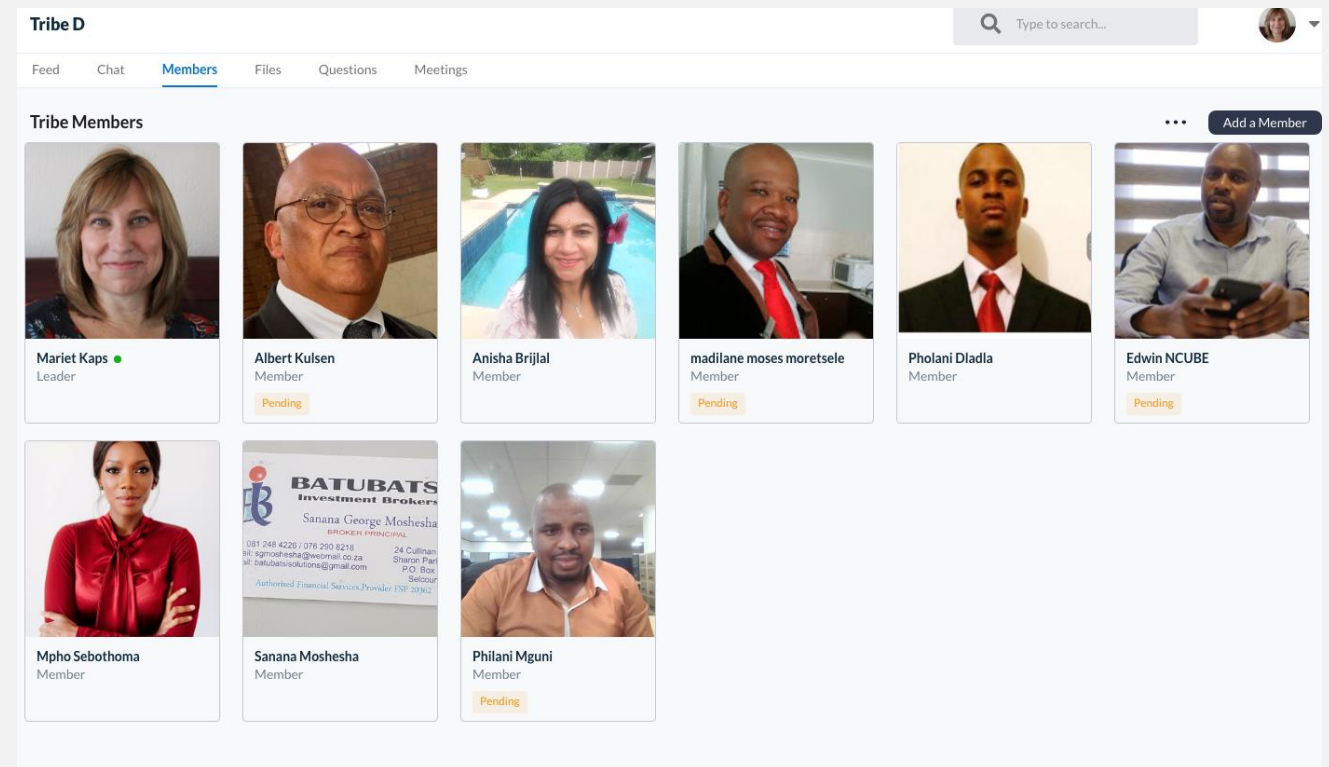
Incubator Portal is a cloud-based entrepreneurship ecosystem management platform designed to help Business Incubators & Accelerators implement, monitor and grow their support programmes; and greatly improve the experience of the entrepreneurs taking part in the program.

PROGRAMME TOOL: INCUBATOR PORTAL

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The screenshot shows a web browser with multiple tabs open: 'Mentor Guide, - kapsmarie@...', 'Google Calendar - Thursday, F...', 'My Drive - Google Drive', and 'Edge Portal'. The active tab is 'edgegrowth.incubatorportal.com/tribe/y01CbIHUTZVMY5mxMI3Jkp0hVcQMI32MI32'. The page displays the 'Edge Growth' logo and a sidebar with navigation options: News Feed, Notifications, Mentions and Replies, Mentees, Team, Projects, Status Reports, Calendar, Files, Tasks, Billing, Support, Groups, Tribe C, Tribe D, Contacts, Edge Growth Solutions, Debra Munemo, Pholani Dladla, Philani Mguni, Edwin NCUBE, Sanana Moshesha, Anisha Brijjal, Mpho Sebothoma, madilane moes moretsele, Albert Kulsen, Gavin Symanowitz, Sipho Ngcobo, Portia Velelathini, Kwazi Khumalo, and Edge Growth Solutions. The main content area is titled 'Tribe D' and shows a 'Feed' tab. It features a post by Anisha Brijjal, who has joined the group on 04 Feb 2022, 11:51. The post includes a photo of Anisha and a bio: 'I am a mother, a grand mother and blessed to work with the love of my life who is the head of the company. Work and business is my passion.' Below the post is a comment section with one comment from Debra Munemo, posted on 02 Feb 2022, 16:42. The comment reads: 'Hello everybody and welcome to your tribe. This is a place for mutual respect, a place for learning, sharing, assisting and networking with each other. Please choose a name for your tribe as well as your Tribes Rules of Conduct. Enjoy the journey and make the most of it'.



The screenshot shows the 'Tribe D' members list. The page has a search bar at the top right with the text 'Type to search...'. Below the search bar are tabs for 'Feed', 'Chat', 'Members', 'Files', 'Questions', and 'Meetings'. The 'Members' tab is selected. The list of members is titled 'Tribe Members' and includes a search bar and an 'Add a Member' button. The members listed are: Mariet Kaps (Leader), Albert Kulsen (Member), Anisha Brijjal (Member), madilane moes moretsele (Member), Pholani Dladla (Member), Edwin NCUBE (Member), Mpho Sebothoma (Member), Sanana Moshesha (Member), and Philani Mguni (Member). Each member's profile includes a photo, name, role, and a 'Pending' status indicator.

05

SME REFLECTIONS

Thapelo
Zama



06

MENTORING-WHAT TO EXPECT



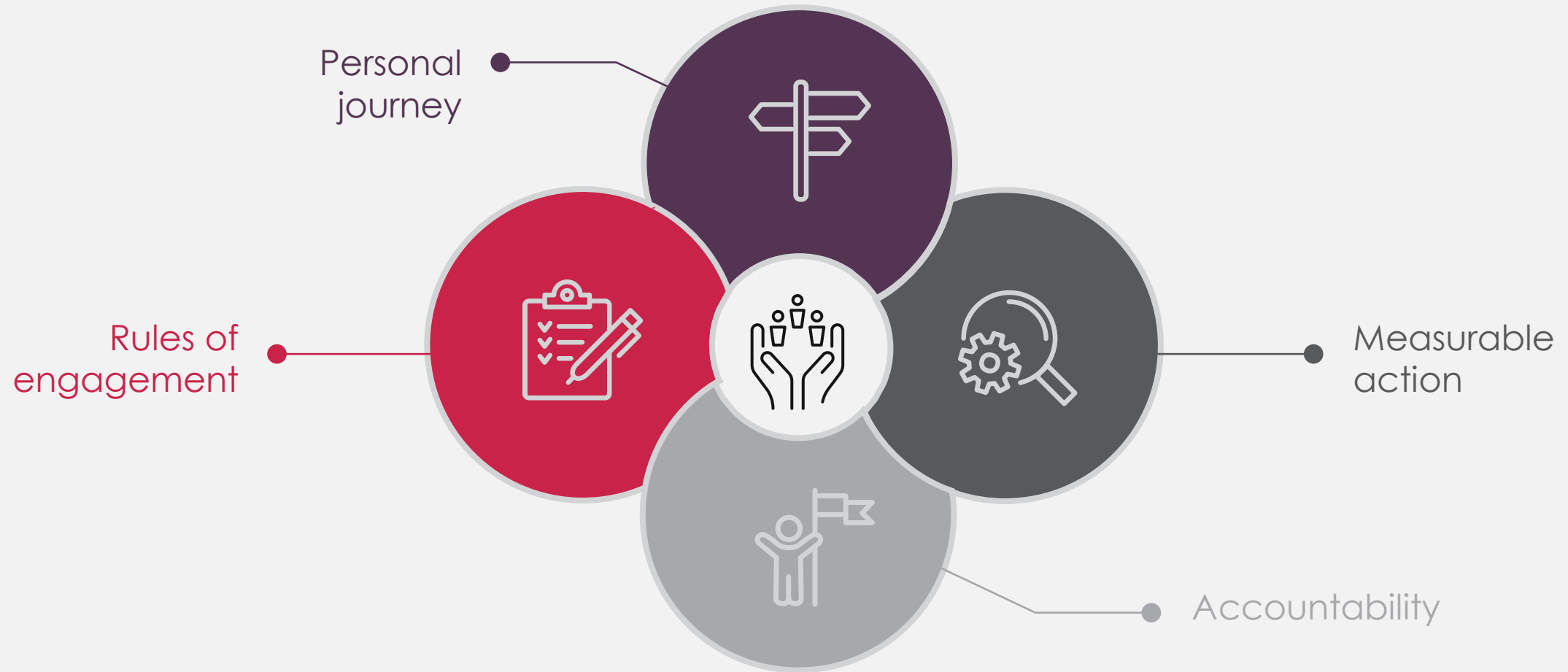
MENTORING – WHAT CAN YOU EXPECT?



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07

NEXT STEPS



NEXT STEPS

- Apply on Incubator Portal

<https://edgegrowth.incubatorportal.com/apply/INSETAintermediary>

- Application closes on 31st of March



INSETA Intermediary Development Programme aims to support the growth and development of black owned SMEs brokerages of the insurance sector and related sub-sectors in order to expand the pool of scarce and critical skills as well as address the issues of sustainability facing the sub-sector. We aim to achieve this by supporting the development of brokers to create maximum shared value for industry brokers and society as well as ensuring the growth and sustainability of brokers by providing best practice business development support.

That's why we're launching a new cohort for 2023 which will be delivered virtually. The programme reaffirms INSETA's commitment to promote meaningful transformation by developing high-growth potential brokerages with the ability to leave lasting impact, and we'd love for you to be part of it.

We are launching it in April and we have partnered with Edge Growth, an experienced business accelerator, to deliver an impactful programme. Edge Growth will assist us in delivering this exciting programme

You can look forward to the programme challenging, inspiring and equipping you with the skills, tools and resources you need to take concrete steps closer to what success looks like and means for you.

How it works

The programme will start in April 2023. It will run for eight months. A limited number of entrepreneurs will be selected to participate after going through an application process that you will all be invited to take part in.

What to expect from the programme?

- ✓ Practical webinars delivered by subject matter experts to help you navigate and overcome key challenges faced by brokers-these will be delivered online and you will only need to give up 4hours of your time.
- ✓ Sharing of learnings and experience in financial advisory Entrepreneur Councils and a community of other INSETA brokers.
- ✓ Access to a mentor to assist with specific matters during Entrepreneur Council sessions.

How to qualify?

To qualify to apply for the programme, your business must:

- Be a 51% or more Black-owned business
- Have an annual turnover of R50m or less
- Have been in operation for more than one year
- Be willing to put aside at least two days per month to take part in business development support activities
- INSETA registered employer (levy or non-levy paying)
- Only companies whose core business falls within the INSETA scope and have submitted a WSP and ATR for the current financial year may apply.

Applications will run from 17 March to 31 March 2023, so please make sure to take action!

We look forward to receiving your application. Good luck!

For any general queries, please contact for INSETA Intermediary Development: Nhlanhla Siboto on NhlanhlaS@inseta.org.za
For Edge Growth: Debra Munemo on dmunemo@edgegrowth.com

Click here to register:
<https://edgegrowth.incubatorportal.com/apply/>



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THANK YOU

We'd love to show you how we can maximise the value of your ESD contribution. Once your requirements have been confirmed, we will provide you with an ESD Contribution Agreement tailored to your requirements as well as the Fund's BEE Certificate.

For further information please contact the Fund on:



+27 (0)21 671 2658



asisaesdfund@edgegrowth.com



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1 Mariendahl Lane, Newlands, Cape

www.asisaesd.org.za