



**OUR BUSINESS IS  
NEW BUSINESS**



# OUR COMPANY

## A proud history

Chartered Developments have come a long way since our days as a small regional accountancy firm in the 1990s. We are proud of our roots.

But now, with a wealth of core strengths and specialisms to support the professional services, we are more proud of where we are today.



*"As members of the Kreston Group, the professional representation of our brand is a key element of the campaigns that we run with Chartered Developments. We've worked with the team at ChartDev for a number of years because of their expertise and ability to run successful campaigns into SME's and Academies"*

**An Accountancy firm in Oxford**



*"Over £1m in fees from SMEs, at a cost of under 17%. For ten years the team at Chartered Developments have been outstanding"*

**A Law firm in Kent**



## PURPOSE

Simply stated, we help our professional services clients to grow their business. We do this through high quality, specialist lead generation and nurturing of prospects and clients.

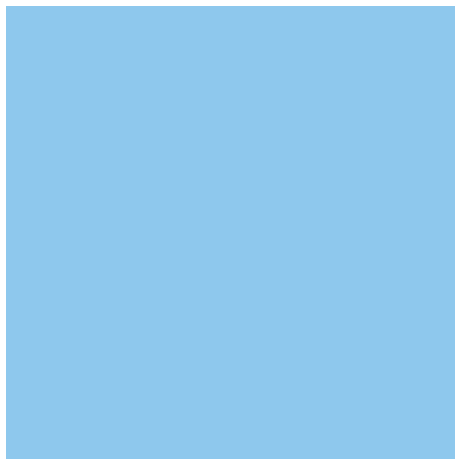
Our role is to accelerate your business growth using a comprehensive range of **data sourcing, intelligence gathering, digital marketing, professional telemarketing, training and pipeline management services.**

When you engage us you'll have at your fingertips a package of business development services from a high calibre team of experienced professionals, keen to help you achieve your goals.



*"The sector industry knowledge and professionalism of the team at Chartered Developments has been the key to the success of our campaigns. We have also developed an excellent working relationship with them over the years, so much so that we trust them with our online diary. This has been a winning combination for us"*

*An Accountancy firm in London*



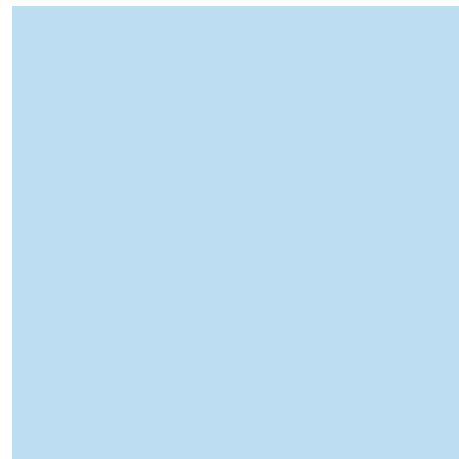
## VALUES

Chartered Developments have an enviable track record. As an industry-leading provider of professional business development services our success is due to a commitment to certain core values.

**Professionalism** – all of our team hail from professional services backgrounds, often from senior positions within their industries

**Quality** – to ensure best practice is maintained we consult with the relevant institute bodies as necessary and have a natural culture of Continued Professional Development. Our training has been approved by the Law Society

**Integrity** – we work at all times within professional and ethical guidelines and Direct Marketing Association best practice



## SPECIALISMS

Today, businesses from all industries enjoy the rewards of our development programmes. Our clients operate in a range of sectors including:

- Law
- Accountancy
- Investment/Asset management
- Insolvency
- Technology
- Banking & Finance
- Employee benefits
- Pensions
- Insurance

Our campaigns for them target:

- FTSE
- Global – US, EU, Africa, Middle East
- Mid-market to smaller OMB SMEs
- Healthcare and Public sector
- DB Pensions – Corporate sponsors and trustees
- Referrers – Accountants, Solicitors, IFAs, Barristers
- Charities

Today's business landscape makes the need to diversify or grow stronger than ever. Our strategies enable this with a sophisticated, consultative approach to lead generation and marketing.

That's why our clients stay with us and view us as an essential part of their Sales and Marketing team.



# OUR SERVICES

## Comprehensive package of services

The key to our success is the desire to work in partnership with you to help develop and grow your business. We achieve this using a comprehensive package of services. These we use in isolation or as a coordinated, multichannel plan tailored to your objectives.

For us, no two projects are the same. We'll consult with you to identify the best mix of services to suit your individual requirements.

## Services to suit you and your target market

When dealing with the professional services we recognise the importance of sector knowledge. Our team is drawn from graduates, professionals and ex-business owners, specially trained within these sectors, who offer a premium service and are able to communicate thoughtfully with c-level decision makers at the highest level.



*"We have used Chartered Developments for many years now and they know the firm well, have a good understanding of the types of prospects we are looking to get appointments with and therefore secure us good quality interviews. They are a friendly and approachable team that are always very responsive"*

**A Law firm in the South East**



## DATA SOURCING

### **Data building, profiling, cleansing and validation you can't do without**

Successful sales and marketing hinges on the quality of your database. Our specialist team will help you define your data requirements and build a bespoke list from the most appropriate sources in the market place, using a wide range of data points including financial, geographical, sector and legal.

Our data can be cleansed and validated by us, is legally compliant and screened for TPS and CTPS.



## DIGITAL MARKETING

### **End-to-end digital marketing strategies for quality lead generation**

We help you attract new clients, working with you to develop a suite of online lead generation tools:

- A new mobile friendly website to showcase your brand more professionally
- Lead Generation pages to develop a database of inbound leads
- Email Marketing to reach potential clients on your behalf
- Digital Collateral including Infographics, social media profile graphics, email templates and more



## PROFESSIONAL, BESPOKE TELEMARKETING

### **Competence and experience in your market**

We use people best suited to your project, including legal, accounting, financial services, or actuarial experts. Your needs will determine the outcomes of conversations with prospects. Typically clients require:

- Prospect nurturing
- Appointment setting
- Demand generation
- Surveys
- Event marketing



## LINKEDIN CONSULTANCY

### **Customised coaching sessions to suit your business**

Finding, researching and nurturing new prospects using LinkedIn is a skill. Our customised, one-to-one coaching sessions and workshops will teach you how to do this. We help you use LinkedIn to build your brand and meet business development objectives.

You'll learn new methods to identify and research prospects and create leads.



## PIPELINE MANAGEMENT

### **Stay on top of your prospect handling**

Managing your sales pipeline is a juggling act. We help you turn cold prospects into fresh opportunities by identifying improvements in your practices.

Manage the entire process with our expert online marketing management system and you'll win a greater proportion of your prospects in less time than it would otherwise take.



## BUSINESS DEVELOPMENT TRAINING

### **Master the structured approach to winning new business**

A business development training course will teach you a structured approach to winning new business. Building on our vast experience gained within the professional services market, all of our programmes are tailored to the individual requirements of partners, managers or key individuals within your team.

**Find out more about our services at [www.chartdev.co.uk](http://www.chartdev.co.uk)**





# OUR PEOPLE

## Specialists, expert in their field...

Your project will be managed by a team with high levels of expertise and industry knowledge. They include former bank managers, accountants, marketing professionals, business

owners, HR professionals and business development professionals.



*"A mainstay and essential partner in our growth into the UK and beyond"*

***A Software Technology company in London***



**RUTH JONES**  
*CEO*

Ruth is a qualified Chartered Accountant with previous roles in practice, including a 'Big 4' firm, and in commerce as a Pension Fund Accountant. Within Chartered Developments Ruth has taken on the challenging position of CEO dealing with the strategic direction, objectives, growth and financial stability of the company.



**ANITA TURNER**  
*Managing Director*

Anita holds the key leadership role within the company and is responsible for its operational running. Working closely with Senior Leadership, Anita supports all team members to help them deliver the best service possible and obtain top results for each client. Anita's experience includes 13 years' work with a top West Country firm of accountants.



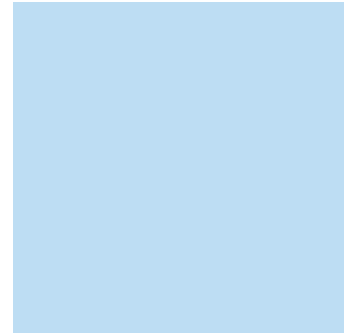
**PETER ROSENWALD**  
*Sales & Marketing Director*

Responsible for our sales & marketing strategy, Peter applies his sales management and forecasting skills to help clients. Focusing on financial and associated markets, he has developed sales training for accountants and solicitors and delivered marketing ethics seminars with ICAEW and the Law Society. Peter has over 50 published articles to his name.



**JANET GREEN**  
*Operations Director*

Janet has responsibility for recruitment and management of the sales team, as well as quality control and efficient production of services to clients. Previous experience includes 20 years managing sales teams for The Daily Telegraph, Mirror Group and other national newspapers, plus work for national recruitment companies.



**DEBBIE FORREST**  
*Client Services Associate*

Debbie's extensive experience targeting different industries with clients gives her the skills to identify improvements in client practices particularly Healthcare.



**THOMAS MORGAN**  
*Client Services Associate*

Tom's skills managing complex business data and campaigns are well suited to his key focus markets of accountancy, legal, pensions and financial services.



**JASON WALDOCK**  
*Head of Information Services*

As provider of insight to clients through data and data services, Jason is pivotal to the continued delivery of our high quality business development service.



**ROHAN HARDEMAN**  
*Head of Corporate Development*

Using a depth of knowledge gained from the financial services sector, Rohan helps new clients grow their business through tailored marketing campaigns.



**EMILY MILLER**  
*LinkedIn Trainer*

Emily's business development expertise lies in training our financial services clients to give them effective prospect engagement techniques using LinkedIn.



**RICHARD HIGHAM**  
*Head of Business Development Training*

Richard and his team have created a full suite of blended learning modules, to unlock and refine latent sales talent.

**Find out more about our services at [www.chartdev.co.uk](http://www.chartdev.co.uk)**



## HEAD OFFICE

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