

Realise
Business
Connect. Energise. Grow.

2020–2021

ANNUAL REPORT



Realise Business

Connect. Energise. Grow.

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Message from the Chair

PETER HOLTMANN

As the changeable environment continued to impact small businesses, Realise Business scaled to meet record levels of service delivery. The strategy building techniques that we had implemented strengthened the organisation's ability to provide the highest level of support and advice to clients.



Responding to the ongoing impact of the pandemic

While the substantial disruptions and changes of the previous financial year were unprecedented, the challenges faced by small businesses throughout FY 21 were equally significant.

I am extremely proud of the efforts and commitment of the board, and the Realise Business team, who continued in their unwavering commitment to supporting small businesses in their greatest time of need.

As restriction levels and economic conditions fluctuated, Realise Business pivoted and adapted, moving to deliver services online to meet increased demand. This innovation resulted in the organisation providing advisory services to a record number of businesses in a single year.

Developing the composition of the board

For the board, our key strategic priority was to continue to grow and evolve by expanding in size and diversity. In line with this priority, we conducted an extensive recruitment process to attract the most appropriate candidates to strengthen the organisation to fulfil this goal.

We are pleased to announce that we will now welcome three new board members in the next financial year. The development will see the board's female participation reach 50%.

New board members bring with them extensive skills and experience to help shape and drive the future of the organisation.

We engaged with The Observership Program to bring on aspiring Board members and provide important experiences and mentoring which assists our observers with the obtaining a role of their own. Last years observer, Ilona Hunnisett, was retained as a tenured Board Director, where she brought a rich set of competencies and experiences to our growing Board. We will continue to engage in this program and strive to be instrumental in the development of future Board Executives.

Reinvesting into the community

We were extremely pleased to secure additional funding from Business Connect and Australian Small Business Advisory Services (ASBAS) to meet increased demands for business advice and support in challenging times.

This crucial funding increase enabled us to realise a program of expansion, investing in

“ As restriction levels and economic conditions fluctuated, Realise Business pivoted and adapted, moving to deliver services online to meet increased demand. This innovation resulted in the organisation providing advisory services to a record number of businesses in a single year.

online solutions, increasing the number of Business Advisors and serving more clients than in any other year.

The funding increase also allowed us to develop a Small Business Community Investment Scheme that will offer select businesses scholarships through our new Business Coaching Program in years to come.

Our surplus from previous years allowed us to invest in product development for our new Business Coaching program. Over the next year, we look forward to developing that program and launching a new sub-brand.

Reflecting on my time as Chair

As this will be my last year holding the position of Chair, it is timely to reflect on the work we have achieved during my tenure.

Together with my fellow board members, we have introduced new strategy building techniques into the organisation. This included implementing three advisory boards in the areas of Business Development, Government Funding and Fee for Service.

We began to see the fruits of our vision in FY21 as Realise Business achieved record growth in numbers and clients.

I would like to acknowledge my fellow board members and my pride in the work we have achieved. Significantly, we leave the organisation in a better place, with a more capable, future-orientated board.

The team's contribution to keeping the business on course throughout the uncertainties of FY21 has been sincerely appreciated. The outstanding team leadership of CEO Jacqui Attard has continued to provide stability and inspiration.

Building resilience has been a pertinent theme, as the impacts of the pandemic continue to be felt. Thankfully our skilled team members, and our networks of members, clients and stakeholders have built a robust framework for delivering our services in the future. Our capacity to meet challenges and thrive in the year ahead looks assured. I have greatly enjoyed working with the board, the CEO and the team ensuring key government contracts and services were secured for optimal resilience.

Thank you for the experience and best wishes for the future.

Peter Holtmann



Message from the CEO

JACQUI ATTARD

Realise Business charted a successful course in 2021, helping businesses build the skills and resilience needed to successfully navigate unpredictable conditions.

We started this financial year with an understanding of how we could recover, learn from, and react to lockdown restrictions. Our focus was on getting businesses back on track and supporting them to succeed in the changing business environment. From within this 'new business normal', we seamlessly scaled our operations, ensuring an increased number of clients received the advice and support they required to adjust and sustain their businesses against the backdrop of future lockdowns and the effect of the pandemic.

Helping businesses recover and build resilience

Acknowledging that many business owners were fatigued by the ongoing impact of the pandemic, we are proud that we had the systems and processes in place to support and guide them through challenging times.

We did this with an increased investment and business support from the NSW and Federal Governments. Their commitment to the small business community and recognition as key contributors to our organisation aided our growth and adaptability. We are grateful for this investment, which allowed us to scale to meet increased demand.

Collectively, our Advisory Team delivered 9,250 hours of business advice across FY21, and I am deeply appreciative of the team's

focus, flexibility, and innovation.

We helped some 2,588 businesses recover, return to business, adapt for future disruption, and realise sustainable growth. Our Business Advisors also upskilled, obtaining Mental Health First Aid Accreditation that empowered them to provide relevant emotional and business support. We increased our team by 75%, welcoming ten new Business Advisors, diversifying our collective skill set and knowledge base.

Our commitment to deliver high quality advice and coaching, was reflected in our net promoter score of 92% and the very positive client feedback we received highlighted that seven in ten clients who received our assistance had higher levels of confidence for the future of their business.

Innovating for the new marketplace and online outreach

Despite the disruptions, we continued to be agile and deliver both our advisory services and events online. We held a record number of events showcasing expanded education and learning opportunities, and we appreciate all the presenters and attendees who participated and formed a robust digital community.

Collectively, we delivered 92 online workshops, webinars and other special events that attracted some 2,189 attendees.



“ Our focus was on getting businesses back on track and supporting them to succeed in the changing business environment.

Our popular Mastermind program moved online and continued to achieve outstanding results.

Some highlights of FY21 included an interactive webinar with Kate Carnell AO, the inaugural Australian Small Business and Family Enterprise Ombudsman and a live webinar with Beyond Blue that focused on navigating uncertainty and mental wellbeing.

We also partnered with Northern Beaches Council, holding digital workshops to assist local businesses impacted by lockdown conditions throughout the 2020 Christmas period.

We are in our third year of working with Speech Pathology Australia (SPA) strengthening outcomes for businesses operating in that sector with our fourth cohort joining our very successful Virtual Learning and Small Business Program.

With our clients adapting and thriving in an online environment, we also recognised we have limitless boundaries. Online delivery empowers us to draw on our significant experience and expand our geographical footprint to serve the small business community right across Australia.

The future of Realise Business

This year marked our last year based in the Sutherland Shire, where the Realise Business service evolved from humble beginnings in 1989, providing services for the local community.

After securing the Business Connect contract in 2017, our services and footprint subsequently expanded across multiple local Government areas. It became our vision and intention to move to a more centralised

location in the Sydney CBD for greater client access.

More than thirty years ago, we began with the vision of being a place for businesses to go. With our CBD move and increased national footprint, we remain steadfast in retaining our community and connection ethos.

The next financial year is a pivotal turning point and growth marker for the organisation. While we continue to deliver on our government contracts, we are also developing a new Business Coaching Program, so watch this space! Changing business conditions and our inability to hold our popular face to face events provided the impetus for innovating membership with a new offering to be launched in 2022.

Sincere thanks

I feel honoured that we have successfully navigated a year of extreme uncertainty with such an inspirational team at the helm and a strong band of supporters.

We would also like to thank our board, who volunteered their time to give us their strategic insight and for continually challenging us to be a better business.

I would personally like to thank the wider Realise Business team – our success is down to their commitment and drive and the extra mile they go to nurture our clients so they can thrive.

Finally, I would like to thank our clients for their commitment to their businesses, their flexibility in working with us in a changing environment, and their ability to demonstrate grace under pressure.



Realise Business Highlights 2020–2021

July 2020

Secured more government funding to assist small businesses recover from the first Covid-19 lockdown

Ten new Business Advisors joined the team to advise on the Australian Small Business Advisory Services (ASBAS) Business Connect Programs



August 2020

Webinar with Kate Carnell, Australian Small Business and Family Enterprise Ombudsman, on The Biggest Hurdles For Small Businesses as a Result of the Covid-19 Restrictions



October 2020

Annual survey on key insights into Covid-19 disruption to small businesses

Webinar with Beyond Blue on mental wellbeing

Small Business Month

Engaged with Mosman, Ku-ring-gai and City of Ryde Councils to deliver specialised webinars



November 2020

AGM with Business Advisors, Board Members and members at The Rocks, Sydney.

Realise Business 2nd Annual Team Conference

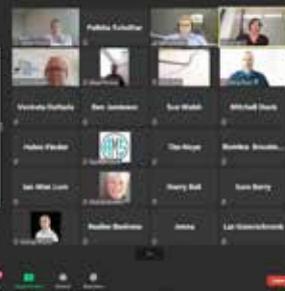




February 2021

Delivered franchisor Nutrition Station Workshops

Transport for NSW Webinar – Winning Government Contracts for Parramatta Businesses



March 2021

Group 4 Speech Pathology Association Virtual Training and Business Coaching Program

April 2021

Transport for NSW Webinar – Commercial Leasing: How to get the best deal for your business

Disruption workshop for Northern Beaches Council

May 2021

Collaborated with the Northern Beaches Council to deliver six tailored sessions on digital solutions

Hosted a successful webinar with Inner West Council reaching 194 businesses locally



June 2021

Record month hosting 12 events

Andrew Thorn, digital guru and CEO of DigitalMass delivered our most successful webinar for the year, 'Google My Business' engaging 641 participants over 7 events

Products and Events

Through our government funded programs we've been able to deliver many high-quality workshops and advisory sessions at little to no cost to our clients.

	FY21	FY20
 Hours of 1:1 business advice	9,250	6,567
 Hours invested helping businesses	11,895	11,388
 Businesses helped	2,588	1,862
 New businesses helped	1,248	1,230
 Events	92	78
 Event Participants	2,189	1,071



► **Business Advice Sessions**

Our growing team of Business Advisors deliver business advice sessions from numerous locations across Sydney. Generalist and Specialist Advisors help businesses set feasible goals, create action plans and develop the tools required to achieve their greatest level of success. Throughout 2020 and 2021, Advisory and Events have taken place in an online format.

► **Workshops**

The Business Connect program, funded by the NSW Government supports Realise Business in the provision of workshops covering various small business-themed topics. Our highly experienced team of Business Advisors and Presenters create and deliver unique and educational workshops at a subsidised cost. Over the financial year we hosted 34 workshops addressing the fundamental challenges that small businesses faced as a result of the first lockdown in Sydney.

► **Webinars**

With many clients now accustomed to attending online events as a result of the Covid-19 disruption, we delivered 58 webinars online through the NSW Government Business Connect Program and the Australian Government ASBAS Program. We also delivered 4 special events through our own initiatives to empower small business owners provide them with continual support during these unprecedented times.

► **Realise Business Coaching**

Our Realise Business Coaching Program is a structured program which provides a combination of monthly coaching sessions and a tailored suite of tools designed to give business owners results-driven guidance. Working 1-1 with our team of business coaches to achieve goals customised for their business, the program provides clients with an accountability trail and the ongoing support of our experts to dive deep into their business to increase their efficiency and grow their businesses.

► **Realise Business Mastermind**

Delivered by a specialist Facilitator, Mastermind groups create a secure environment for participants to share their issues and receive peer-to-peer advice from other members who are on the same business journey. A low-cost high impact initiative, Mastermind is designed for people to learn how other successful founders have overcome their challenges to build successful businesses. Group members foster mutually beneficial relationships, give and receive honest feedback, help overcome roadblocks and make confident decisions together – all within a confidential environment. Mastermind groups take place in both face-to-face and online formats.

Succession plan solution for a family business owner

Glenn Sampson's Sons

Approaching his seventies, the key to Glenn Sampson's happy retirement lay in making an informed decision about the fate of Alpha and Omega – the family air-conditioning business.

When he first contacted Realise Business advisor Geoff Silk, the two alternatives were for Glenn to sell the Kirrawee business or prepare a son to become the successor.

Glenn and Geoff worked out a plan to make the business more self-sufficient and test his succession candidate while preparing to hand over the reins.

The business Glenn and his wife had established 30 years before was run from the family home. Whether selling or ensuring succession, the business needed to be more self-sufficient.

Relocation to independent premises became the priority. The plan was realised within 18 months, with convenient premises in Kirrawee providing offices and storage facilities.

To increase the self-sufficiency of the business, Glenn's wife then handed over her duties as receptionist and bookkeeper. The process involved formalising a combined receptionist bookkeeper role, recruiting and selecting then training a new employee.

During the early advisory meetings with Realise Business, it became apparent that Glenn's preferred pathway was to hand



Nigel Sampson



Gavin Sampson

down the business to one of his sons rather than sell it.

Both sons worked for Alpha and Omega as trained electricians and fitters. Glenn began training up one son as a succession candidate. He sat in on the Realise Business advisory sessions, and when Glenn felt confident to step away, his son spent all the session advisory time with consultant Geoff.

The other son left the business during the transition phase, and the succession candidate demonstrated his readiness to control and supervise it.

Glenn had been at a crossroads reached by many family business owners. Fortunately, the workable succession plan devised with Realise Business achieved a positive outcome, so Glenn knows he can retire secure in the fact that the business will continue to succeed.

ABOUT ALPHA AND OMEGA:

They are a family run air conditioning business supplying and installing the latest air conditioning systems since 1989. Their commitment to quality and customer service has allowed them to grow, and now service both the wider Sydney Metropolitan area and the Illawarra region.

“ Chris was very personable and honest. He was there to question my thoughts and acted as a sound board, which gave me the confidence to make better decisions for my business. I really enjoyed working with him and look forward to working with him again in the future as my business evolves.

Strattens builds a solid business foundation

New business owner Simon Stratten learnt about Realise Business services from a satisfied client. Having started his Painting, Carpentry and Home Maintenance small business the previous year, he was keen to obtain independent guidance on how to progress.

Simon and consultant Chris Cassar discussed building up the Strattens brand and moving away from reliance on HiPages to secure new clients.

Chris worked extensively with Simon to clarify the core services and business vision. He advised on website imagery and text, local tactical activities, developing internal systems to manage growth, plus helped produce communication materials.

Key markers for progress included strong growth in Strattens' turnover, the implementation of new database software and the hire of four subcontractors.



Simon anticipates future Realise Business consultations will focus on brand strengthening, local area tactical activities, and long-term financial targets.

ABOUT SIMON STRATTEN:

Simon Stratten went to college to train in Carpentry and, after a few years, became qualified in Painting and Decorating. He then started a business in central London, which he ran for many years and provided a full building and maintenance service to the largest property management company in the country, employing numerous staff and carrying out thousands of jobs. In the late 1990s, Simon moved to Sydney and has built up a portfolio of hundreds of trusted clients and many businesses, as well as charities.



Imperial Gluten Free Bakery audits the ingredients for growth

As the owner of Imperial Gluten Free Bakery, Danny Haddad has successfully worked with Realise Business adviser, Tim Noye, to improve business productivity and expand the business to cater for a broader market. While expansion was a key idea, Danny wanted to grow sustainably and not sacrifice quality.

After learning more about the gluten-free baked goods business, adviser Tim Noye proposed a three-point action plan that included an operational audit and analysis of the cost of goods sold (COGS), a sustainable expansion that involved strategic supply chain refinement, cost-trimming and streamlining operations.

“ Business Advisor Tim Noye played a crucial part in streamlining our operations, restructuring the business and implementing new strategies. This, in turn, enabled us to grow our business and operations sustainably.

The first phase of the bakery’s expansion has been a success, with the businesses securing a contract with a well-known stadium. As well as providing security, the contract enables further scaling of the business and operational costs may be reduced by as much as ten percent.

Westmead Foot Clinic steps up their marketing strategy

Third generation podiatrist Amelia Fryc from Westmead Foot Clinic successfully worked with Realise Business Advisor Sue Walsh on a digital marketing plan to boost customer retention. Actions involved a review of current strategies, including the value she was getting from her marketing spend.

Sue and Amelia identified the business was spending more than \$500 a year on a dated web page that failed to promote the business properly or highlight the benefits of the professional and caring clinic. It also didn’t allow for easy content updates or other customer service integrations.

“ Sue has helped me identify solutions in areas of my business where I have spent money in the past on underperforming marketing strategies. She has become an invaluable mentor and business coach. We appreciate the help and knowledge she has offered our business – especially with marketing.

Sue advised Amelia a WordPress website would assist their new marketing strategy to raise the business’s profile in the local area. Amelia found the review to be valuable and productive.



What Our Clients Say

“ Our identity has changed from being a Transport Company to a Tour Operator. I have always wanted to do the transition and held back. Campbell just has the professionalism and ability to make it happen. The change has resulted in an immediate increase in revenue. Thank you for sending Campbell our way.

Peter Berry,
Shire Shuttle Bus
Pty Ltd

Campbell Mckay

I've always recommended Chris to my friends in the start-up community. He is extremely engaging and caring, eager to ensure your business has everything to be set up for success. Thanks as always Chris.

Alex Short,
PerformID

Chris Cassar

Adam has extensive experience and knowledge to learn from, with outside the box thinking and ideas. He is very easy to talk to and everything explained was easy to understand, especially for someone new in business. He broke down tasks that were easy to follow and walked me through options to help with challenges I was having. I would definitely use Adam again for my business. Thanks Adam!

Vanessa Cignarella,
Organised Style
Living

Adam Hetherington

This is possibly the most helpful service I have come across and my advisor is amazing and challenges my every move which is fantastic. Really valuable and insightful service.

Steven Jones,
Crown Street
Collective

Amanda Werrington

Immediately after the meeting I made a post in a Business owners Facebook group to recommend the service. I am so bloody impressed that this is a free service. I got more out of this meeting than I have out of paid weekly or monthly course. Amy was incredible. So knowledgeable, so easy to chat with, and she gave me clear steps to follow so I have a plan of action. Can't rate this highly enough.

Elena Lambrinos,
Dance Domain

Amy Chen

Geoff is very knowledgeable in his field and provides exceptional service that is easily understood. He has contributed a lot of value to our company and was so helpful in helping with setting the new business strategy. We are forever grateful for his services and for the team who have been helping us with our transition.

Alice Gleeson,
Ampe Services
Pty Ltd

Geoff Silk

Business Connect is an excellent program for anyone who wants to become an entrepreneur and has no idea where to start this journey. Thank you for the service and guidance.

Ana Hofmann

Syane Macedo

Client Success Stories

“ Within one hour James established trust and gave us the confidence to pursue one of two options for our pricing strategy and entry to market. We will be looking to arrange further advisory sessions with James as we see his input has a lot of value.

James Cody,
Kavaho Pty Ltd

James Evangelidis

I have taken marketing actions that already positively impacting on my business, so I am very happy with my session with Yesica. This session gave me hope that there is a way through this COVID challenge for my business. Thanks for being here for us, I am very grateful.

Kristina Devlin,
22/4 & 8 Pty Ltd

Yesica Alfonso

Megan is a true professional. Talking to her today elevated my mood and made me feel positive about the future of our business. Thank you. I really look forward to our next meeting – I am excited about the possibilities.

Sharon Barrios,
Don Adan Coffee

Megan Hauptfleish

Patch took time to fully understand my businesses then let me lead the direction of the initial session based on my key business objectives. She led me quickly and comfortably down the path of putting together the beginnings of a business plan and I very much look forward to working with her again soon.

Amanda Michetti,
Lets Make Stuff

Patch Clunes

Sara was very efficient, clear and professional at our meeting. She helped us to understand and separate our needs and wants and the direction to take. She also helped us to move toward a direction that is beneficial, but doesn't cost half our lives. I would definitely recommend her services and we appreciate her expertise.

Adrienn
Tothne Toth,
Sydney Timber
Floor Specialists

Sara Berry

Chris is very informative and he is very helpful. Always asking if we were happy with different options that he gave and for me to decide. Was very accommodating with different options that I would suggest. Always making sure that we were happy with all the decisions that we made. I would recommend him to anyone that would like to start a non-for-profit.

Lesina Haumono,
Tongan Evangelical
Wesleyan Church

Christopher Wilborn

Funding Partners

The continued support we receive from our valued funding partners makes it possible to give low cost, high quality business advice and services to the 2,500+ businesses we engage with each year.

Business Connect

Funded by the NSW Government

► Business Connect

Realise Business is a key provider of business advisory services under the NSW Government Funded Program. Delivering advisory services and business skills training to the northern, southern, inner west and CBD areas of Sydney, this program gives small businesses access to personalised and dedicated business advice to encourage economic sustainability and employment growth across NSW.

As well as providing business advisory services under this program, Realise Business delivers the Business Connect Access to Finance Program. This program gives small business owners access to a specialist business advisor in the area of business finance, lending and grants.

► Australian Small Business Advisory Services (ASBAS) Digital Solutions Program Australian Government AusIndustry

Realise Business, as part of a consortium, delivers the Australian Small Business Advisory Services (ASBAS) Program across Sydney. This program complements the advisory services offered by the NSW State Government and supports the Australian Government's commitment to improve, support and enhance

Australian Small Business Advisory Services

DIGITAL SOLUTIONS

AN AUSTRALIAN GOVERNMENT INITIATIVE

small business digital competencies. Our specialist advisors provide low cost, high quality advice across four priority digital capabilities including support relating to websites and selling online, social media and digital marketing, using small business software and online security and data privacy.



Transport for NSW

► Parramatta Light Rail, Transport for NSW

Realise Business is the contracted organisation delivering business advisory support to businesses impacted by the light rail construction. Transport for NSW will link businesses directly with Realise Business to ensure local businesses can maximise their potential, navigate the challenges and make the most of all opportunities ahead. A specialist Hospitality Advisor is working closely with businesses in Eat Street, Parramatta, a regular e-Newsletter and one-to-one business advisory sessions provide further support.

Partnerships

Throughout the year we partner with various businesses who share our vision for helping businesses grow. These partnerships enable us to continue to deliver quality events and services to our members.

► Business Enterprise Centres (BEC) Australia



Realise Business is a long-time member of Business Enterprise Centres Australia, a national network offering business analysis and advice, mentoring support, business information and training to businesses at all stages of development. The Centres are all about supporting local business and encouraging local businesses to meet each other, share experiences and network.

► Speech Pathology Australia



Speech Pathology Australia

Realise Business is continuing our partnership with Speech Pathology Australia for a third consecutive year. In the duration of this partnership, over 100 clinics have been helped, equipping them with everything they need to know about running a successful business. This tailored business programme consists of seven modules that covers all fundamental elements in business. Two successful groups have completed the training program this year.

► Nutrition Station



Realise Business engaged with Nutrition Station to deliver personalised business education to Nutrition Station franchisees by providing excellence in professional development that ensures sustainability of the franchisees' investment. The coaching programme was designed to develop the entrepreneurial skills required to seize the opportunities and to grow sustainable stores.

► Other Partners



Lifestyle and opportunity
@ your doorstep



northern
beaches
council



COVID-19 Survey 2020

The impacts of the global Covid-19 pandemic delivered many challenges to small businesses, amidst already mixed economic conditions and off the back of a major bushfire season in Australia.

To gain insight into and better understand the impact of Covid-19 on small businesses, in mid-2020 we partnered with research experts Survey Matters, to approach our clients with a detailed quantitative survey. The results gave us knowledge to inform, not only us as a business, but the government on how we can improve our offering and continual support during this challenging time. A total of 354 clients responded to the survey.

Not surprisingly, the survey results showed that many businesses struggled during the lockdown, and over the subsequent period.

A large proportion indicated they had lost a substantial proportion of their revenue and customer numbers, while others closed down entirely. This occurred despite government financial assistance, changes to businesses practices, and the implementation of new digital-based strategies.

Despite this, there were some bright spots, with some businesses reporting growth in business activity and revenue. Others highlighted that they had learnt more about themselves and their businesses and were quietly optimistic moving forward.

Key findings

A majority of businesses reported a decline in business activity during lockdown	Almost three-quarters (73%) of survey respondents reported a decline in business activity, while a further 6% were no longer trading.
Investment in digital was strong over the lockdown period	Overall, 54% of businesses invested in digital. Some 82% businesses reported being online before lockdown, whereas after lockdown 87% reported having an online presence.
Upskilling in digital was a priority	68% of business rated the need to upskill in digital higher to before lockdown.
JobKeeper the main support during lockdown	More than half (53%) of survey respondents received JobKeeper as a result of the first lockdown. Approximately 36% of respondents received no government assistance.
Revenue falls forecast over the next 12 months	Almost half (47%) of survey respondents expect their revenue to decline over the next 12 months. A further 14% expected the same revenue, while 38% forecast a revenue increase.

Meet the Board



PETER HOLTMANN

– Chair

Peter is an experienced business leader, executive coach and business excellence consultant. He has global experiences on non-profit and charity boards as a strategic expert. Peter led an international non-profit for 12 years visioning and building the strategies for governance, growth and sustainability, and created the essential connections and opportunities for collaboration and affiliation. Peter understands the changing needs of charities and non-profits in the local market, having also chaired an association committee for non-profits focused on international expansion.



ADRIAN BROCK

– Treasurer

Adrian has held a Board role since 2014 and is a partner of “CFO On-Call” which provides business and financial management advice to businesses. Adrian was formerly COO of The Griffin Group, and a Partner in Deloitte. He brings 50 years’ experience.



LINDSAY MUNNS

– Board Member

With a career spanning over 28 years in the SME sector within owner, manager, director and advisor roles, Lindsay has an intimate knowledge and appreciation of what makes this vital sector tick. Prior to stepping into the role as Chair, Lindsay served as the CEO and member of the Board for the Anytime Group. He was the master franchisee for this fast growth SME, supporting over 400 small business franchisees nationally. He joined Realise Business in 2015. Lindsay has played an integral role in guiding the organisation through a significant period of expansion and success. Lindsay handed over the role of Chair at the end of this year and remains a Board Member.



DES VIRANNA

– Board Member

A digital marketing and analytics expert with over 18 years’ experience, Des brings a wealth of relevant industry experience and top-level strategic knowledge to the Board. Having worked as both a Director and GM, he has an intimate understanding of the hardships faced by small business owners on a daily basis.



ILONA HUNNISETT

– Board Member

Ilona Hunnisett is a senior lawyer with over 10 years’ experience advising on general corporate, mergers and acquisitions, equity capital market transactions, governance and foreign investment matters. Ilona works on a broad range of transactions from seed investments, start-ups, private equity transactions and public takeovers. Her clients value her commerciality, tenacity and proactive approach reflecting her prior experience in commercial focused roles and across multiple industries.



TINA KAZMER

– Board Observer

Tina has spent the last 20 years in senior corporate marketing roles for a variety of organisations including professional services, education, employment, technology and thought leadership. Her roles have seen her involved in strategy development, thought leadership, marketing and campaign planning, events, media, market growth, content development and brand awareness.



MATT TOP

– Board Observer

Matt brings over 17 years of experience in senior public and private sector roles, working closely with executives across strategy, evaluation and operations. Matt is currently one of the digital and business strategy practice at Nous Group, Australia’s largest owned Management Consulting Firm.

Meet the Team



JACQUI ATTARD
– Chief Executive Officer

Jacqui Attard is a business expert and coach who has devoted her career to helping small businesses grow and prosper. Her passion and knowledge for small business

is boundless as is her expertise on all the sectors she works across. As CEO of Realise Business, Jacqui develops coaching programs and services to help businesses grow and increase their profitability. Jacqui also has a background in business coaching in Health Professions which inspired the successful rollout of the OTA Virtual Learning and Business Coaching Program. As a specialist in Business Disruption, Jacqui is the perfect person to lead our team and our clients through this year of unprecedented change.



CHARMION INGRAM
– Lead Advisor

For the past 20 years Charmion Ingram has built a strong background in Strategic Business Consulting, Culture and Organisational Change. Her

roles have included Manager, Business Consulting and Planning at AMP where she was instrumental in building the “coach to coach” training program for the Business Partnership Managers that supported the wider AMP Financial Advisor network of 800 businesses.



BERNADETTE WALKER
– Chief Operations Officer

With over 25 years’ of operations experience in the real estate, banking and finance, and education sectors, Sally has been both a business owner and senior

manager in the property advisory/valuation industry as well as in the tertiary education sector. Sally is experienced in operations, client relationships, business development, transformational change, tenders, mergers and acquisitions.



ELECIA DOUGLAS
– Brand and Marketing Manager

Elecia brings over 13 years’ multi-disciplinary marketing experience to Realise Business, across B2B and

B2C marketing, digital and content marketing, membership marketing, brand, corporate communications, public relations, and event management. She has worked across a wide breath of projects from content and coverage of high performance sports teams, through to digital, business change projects, new membership and event product launches.



PALISHA TULADHAR
– Digital Marketing & Technology Specialist

Palisha is a marketing specialist who brings strong insight and a genuine passion for digital marketing to the Realise Business team. When she’s

not keeping the website and our digital communications running smoothly, she enjoys engaging with members at networking events and workshops.



COURTNEY SANDOR
– Events Coordinator

Courtney is a events specialist who brings with her a strong administration skillset and a passion for all things marketing and events. Her strength in building relation-

ships with clients and stakeholders and her dedication to customer service makes Courtney the perfect person to coordinate events both face to face and online for Realise Business.



DONNA INNES
– PA/Client Coordinator

Donna is a client services professional who enjoys working with a diverse group of people in a calm, polite and effective manner. Fostering teamwork, operational

excellence, and quality of service at all times, she prides herself on her clear communication style when working with our Business Advisors and our Clients.

Meet the Business Advisors



Yesica
Alfonso



Sara Berry



Chris Cassar



Amy Chen



Patch Clunes



James
Evangelidis



Megan
Hauptfleisch



Judy
Hendricks



Adam
Hetherington



Syane
Macedo



Naomi
Matcham



Campbell
McKay



Tim Noye



Russell
Pearson



Chris J Shaw



Geoff Silk



Liza Taylor



Sue Walsh



Wayne
Wanders



Amanda
Warrington



Jo Attard
Watters



Christopher
Wilborn

Abridged Financials

Balance Statement For The Year Ended 30 June 2021

	2021 (\$)	2020 (\$)
ASSETS		
CURRENT ASSETS		
Cash and cash equivalents	1,275,900	310,480
Trade and other receivables	94,927	584,960
TOTAL CURRENT ASSETS	1,370,827	895,440
NON-CURRENT ASSETS		
Trade and other receivables	27,848	6,031
Property, plant and equipment	5,673	16,237
Intangible assets	80,425	35,458
TOTAL NON-CURRENT ASSETS	113,946	57,726
TOTAL ASSETS	1,484,773	953,166
LIABILITIES		
CURRENT LIABILITIES		
Trade and other payables	281,159	98,485
Borrowings	7,738	2,691
Current tax liabilities	34,155	68,467
Employee benefits	27,910	33,765
Other Financial liabilities	–	254,162
TOTAL CURRENT LIABILITIES	350,962	457,570
TOTAL LIABILITIES	350,962	457,570
NET ASSETS	1,133,811	495,596
EQUITY		
Retained earnings	1,133,811	495,596
TOTAL EQUITY	1,133,811	495,596

Statement of Changes in Equity

For the Year Ended 30 June 2021

	Retained Earnings (\$)	Total (\$)
Balance at 1 July 2020	495,596	495,596
Surplus attributable to members of the entity	648,167	648,167
Retrospective adjustment	(9,952)	(9,952)
Balance at 30 June 2021	1,133,811	1,133,811

Abridged Financials

Statement of Profit and Loss For The Year Ended 30 June 2021

	2021 (\$)	2020 (\$)
INCOME		
Revenue	2,686,547	1,921,729
COVID Assistance Grants	102,938	68,000
Other income	255	480
TOTAL INCOME	2,789,740	1,990,208
COST OF SALES		
Business advisors	1,071,169	817,299
Catering & venue hire	23,272	54,203
TOTAL COST OF SALES	1,094,441	871,502
GROSS SURPLUS	1,695,299	1,013,877
EXPENSES		
Depreciation and amortisation expense	11,801	23,738
Employee benefits expense	648,231	697,765
Finance expenses	52	58
Total other expenses	387,048	331,069
TOTAL OPERATIONAL EXPENSES	1,047,132	947,800
SUMMARY		
Total Income	2,789,740	1,990,150
Less Cost of Sales	1,094,441	976,273
Gross Surplus	1,695,299	1,013,877
Total Operational Expenses	1,047,132	947,800
Surplus	648,167	66,077

Future Outlook

The year ahead will be one of change and development, seeding in new products and services that will be the foundation for a new era at Realise Business.

► Office move

2021 will mark the end of our time in the Sutherland Shire, with our office set to move from Kirrawee to the Sydney CBD. While a lot of our services have moved online since COVID, moving to a smaller, yet centrally positioned location means we'll be able to deliver more services to businesses across Sydney and beyond.

► Coaching

A major focus of our new strategic plan is the development and productisation of a new Business Coaching Program. The new program will allow clients to work one-to-one with a Business Coach, in a personally tailored year-long coaching journey. Designed for small business owners who are seeking to do business better, the program will also leverage technology and introduce multi-media content and new methods for education and coaching delivery. The new digital format also means it can be made widely available, whilst still maintaining a high quality yet low-cost program. The new program and subsequent sub-brand under Realise Business, will be launched in the autumn of 2022.

► Scholarship

In parallel to the innovation of our services, we will also be launching a new Small Business Community Investment Scheme, allowing selected businesses access to our new Business Coaching program free of charge. This is part of our commitment to invest back into the community, with the intention to work with businesses who are assisting marginalised communities.

► Government contracts

The year ahead will again be a busy year for service delivery of our major Government Contracts as we continue to deliver Business Connect, Australian Small Business Advisory Services (ASBAS) and the Transport for NSW Paramatta Light Rail project. Both the New South Wales and Federal Government have sustained their funding, to enable services such as our organisation to provide ongoing support for small business owners as we recover from the impact of lockdowns.

► Events

The increased funding will mean we are set to have a record year of not only Advisory hours delivered, but also a record number of workshops and webinars. As clients have adapted well to the



Future Outlook

ongoing online delivery of workshops, we will continue to offer these easily accessible learning opportunities, whilst also introducing new topics and presenters that address the acute challenges being faced by the current market.

However, as Australia moves into a new business normal and living with COVID, we intend to bring back face-to-face networking events in 2022. A key part of the Realise Business DNA has always been about meaningful connection. After a tough and isolating couple of years, we are looking forward to providing clients with the opportunity again to network and engage with each other.

► Diversity the Board

As we grow and evolve as an organisation, it is only fitting that we expand our Board to welcome new strategic input and insight. Welcoming new Board members and continuing the observorship program also means that we diversify the Board to now feature an event split between male and female representation. Our goal is to move towards a more sustainable model of equality.

► Thank you

In what continues to be an extended time of uncertainty for small business, thank you for being part of our community. While the pandemic has not come without its challenges and major disruption to business, it has however now highlighted the important place small businesses hold in our local communities. As we forge ahead into a new financial year, we will remain committed to empowering our clients to build and run successful businesses, to not only generate new growth but also job creation in their respective communities.



Realise Business

Connect. Energise. Grow.

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