

General Details

Client Name

Company Name

Account Number

Fee Plan

Credit Line

What benefit did you see for your business by opening a BBX account?



Your credit line is interest free and available to spend now, even before you have made a sale. You pay back the credit line with new BBX business.

Making sales through BBX

What products or services would you like us to sell on BBX and how do you charge? Prioritise options.

What does a typical customer look like? What is your target market?

What is your elevator pitch? (hook, pitch, close)

Spare Capacity / Unsold Time / Unsold Inventory

The purpose of this exercise is to measure the current productive output (income generating activity) and identify how much potential revenue you are missing out on. Click on one of the calculators below to help you work out your spare capacity.

Service Provider ☐ Retailer/Stock ☐ Restaurant ☐ Hotel ☐ Manufacturing ☐ Media ☐


Your Max Potential Turnover:

Your Annual Turnover:

The Gap (Spare Capacity):

Typically businesses work to sell 5% - 20% of their turnover on BBX. This is because it will usually cover 20-50% of the peripheral expenses in the business. **Select the option you are comfortable with?**


Percentage of Turnover:	5%	10% (average)	20%
Annual Amount (£):	<input type="text"/>	<input type="text"/>	<input type="text"/>
Avg per Monthly (£):	<input type="text"/>	<input type="text"/>	<input type="text"/>
BBX Sales Goal (tick):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

 **Please note:** It is really important that you give us accurate information, particularly on the real figures in your business. The goals set are attributed to the figures you give us and if incorrect could lead to wrong expectations.

The cost of your BBX pound - Cash Savings

Here we work out what it costs you to sell your product/ service on BBX, calculating your cash saving when spending BBX.

Product / Service sold on BBX:	<input type="text"/>		<input type="text"/>	
	Amount (£)	Percent (%)	Amount (£)	Percent (%)
A. Sale Value:	<input type="text"/>	100%	<input type="text"/>	100%
B. Variable Cost (what costs would rise): Don't include fixed costs such as PAYE staff, rates, rent and so on	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
C. Sales Success Fee:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D. Cost of BBX pound (B + C):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash Savings (A - D):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



At this point, for comparison it is probably important to consider the cost of employing an internal sales person or hiring an external sales agency. An outsourced sales agency would charge a monthly retaining fee plus commission with no guarantee. You get a guarantee with BBX.

Earn BBX & Spend BBX - Overall Cash Savings

Comparison: The difference between spending (£) BBX and spending (£) sterling.

Purchasing Products/Services with <i>BBX</i>			Purchasing Products/Services with Cash	
<i>BBX (£)</i>	Bank (£)		Cash (£)	
A. Opening Balance:	<input type="text"/>		E. Bank Balance:	<input type="text"/>
B. BBX Amount spent on product/service e.g. advertising	<input type="text"/>		F. Amount spent on product/service	<input type="text"/>
C. Variable cost to earn the spent BBX <small>This is the cash cost to earn the spent BBX as worked out above in (D)</small>	<input type="text"/>			
D. Closing balance after purchase (A-C)	<input type="text"/>		G. Cash in Bank after purchase (E-F)	<input type="text"/>
H. Total cash saved when spending BBX rather than sterling (D-G)			<input type="text"/>	Percent saved % (H/F) <input type="text"/>

☐

I acknowledge I have been taken through part 1 of the induction and understand my cost of BBX and cash savings. I understand in order to realise my cash savings I have to EARN and SPEND BBX.

Expense Profile

These are various areas of the business and personal life where you are currently spending cash OR where you would like to spend the additional income you will receive through BBX. Please enter the amount you currently spend OR the amount you would budget for the expense. Tick priority if willing to change your current supplier or currently seeking a supplier.

 Remember to take into account your BBX cash saving when deciding on budget.

Marketing

	Amount	Priority		Amount	Priority
Email Marketing	<input type="text"/>	<input type="checkbox"/>	LinkedIn Support	<input type="text"/>	<input type="checkbox"/>
CRM Database	<input type="text"/>	<input type="checkbox"/>	Facebook/Instagram	<input type="text"/>	<input type="checkbox"/>
Website	<input type="text"/>	<input type="checkbox"/>	YouTube	<input type="text"/>	<input type="checkbox"/>
Landing Pages	<input type="text"/>	<input type="checkbox"/>	Twitter	<input type="text"/>	<input type="checkbox"/>
Sales Funnel	<input type="text"/>	<input type="checkbox"/>	Other Social	<input type="text"/>	<input type="checkbox"/>
Lead Generation	<input type="text"/>	<input type="checkbox"/>	SMS Marketing	<input type="text"/>	<input type="checkbox"/>
Apps	<input type="text"/>	<input type="checkbox"/>	Photography	<input type="text"/>	<input type="checkbox"/>
Website Hosting	<input type="text"/>	<input type="checkbox"/>	Video Services	<input type="text"/>	<input type="checkbox"/>
SEO & Analytics	<input type="text"/>	<input type="checkbox"/>	Podcasts	<input type="text"/>	<input type="checkbox"/>
PPC & Display Ads	<input type="text"/>	<input type="checkbox"/>	Vlogcasts (Video)	<input type="text"/>	<input type="checkbox"/>
Webinars	<input type="text"/>	<input type="checkbox"/>	Sales Presentation	<input type="text"/>	<input type="checkbox"/>
Networking	<input type="text"/>	<input type="checkbox"/>	Sales Pitch	<input type="text"/>	<input type="checkbox"/>
Exhibitions	<input type="text"/>	<input type="checkbox"/>	Graphic Design	<input type="text"/>	<input type="checkbox"/>
Events	<input type="text"/>	<input type="checkbox"/>	Leaflets	<input type="text"/>	<input type="checkbox"/>
Public Relations (PR)	<input type="text"/>	<input type="checkbox"/>	Marketing Brochure	<input type="text"/>	<input type="checkbox"/>
Magazine Ads	<input type="text"/>	<input type="checkbox"/>	Business Cards	<input type="text"/>	<input type="checkbox"/>
Radio Ads	<input type="text"/>	<input type="checkbox"/>	Banners	<input type="text"/>	<input type="checkbox"/>
Outdoor Ads	<input type="text"/>	<input type="checkbox"/>	Marketing Consultant	<input type="text"/>	<input type="checkbox"/>
Signage	<input type="text"/>	<input type="checkbox"/>	Sales Consultant	<input type="text"/>	<input type="checkbox"/>

Expense Profile Continued...

Additional information or marketing expenses you may spend on that have not been mentioned.

Sub Total

Business Services

Amount			Priority			Amount			Priority		
Virtual Assistant	<input type="text"/>	<input type="checkbox"/>	Accountant	<input type="text"/>	<input type="checkbox"/>						
Personal Assistant	<input type="text"/>	<input type="checkbox"/>	Bookkeeping	<input type="text"/>	<input type="checkbox"/>						
Telephone Answering	<input type="text"/>	<input type="checkbox"/>	Payroll	<input type="text"/>	<input type="checkbox"/>						
Virtual Office / Office	<input type="text"/>	<input type="checkbox"/>	Pension / Auto Enrol	<input type="text"/>	<input type="checkbox"/>						
IT Support	<input type="text"/>	<input type="checkbox"/>	Human Resources (HR)	<input type="text"/>	<input type="checkbox"/>						
Software Development	<input type="text"/>	<input type="checkbox"/>	Recruitment	<input type="text"/>	<input type="checkbox"/>						
Solicitors	<input type="text"/>	<input type="checkbox"/>	Carpet Cleaning	<input type="text"/>	<input type="checkbox"/>						
Shareholder Agreement	<input type="text"/>	<input type="checkbox"/>	Other Cleaning Services	<input type="text"/>	<input type="checkbox"/>						
Debt Collection	<input type="text"/>	<input type="checkbox"/>	Fire Safety	<input type="text"/>	<input type="checkbox"/>						
Business Insurance	<input type="text"/>	<input type="checkbox"/>	PAT Testing	<input type="text"/>	<input type="checkbox"/>						
Life / Health Insurance	<input type="text"/>	<input type="checkbox"/>	Pest Control	<input type="text"/>	<input type="checkbox"/>						
Office Furniture	<input type="text"/>	<input type="checkbox"/>	Utility Bills	<input type="text"/>	<input type="checkbox"/>						
Photocopier / Printer	<input type="text"/>	<input type="checkbox"/>	Courier Services	<input type="text"/>	<input type="checkbox"/>						
Phone Systems	<input type="text"/>	<input type="checkbox"/>	Carbon Offsetting	<input type="text"/>	<input type="checkbox"/>						

Additional information or other business expenses you may spend on that have not been mentioned.

Sub Total

Expense Profile Continued...

Training Services

	Amount	Priority		Amount	Priority
Marketing	<input type="text"/>	<input type="checkbox"/>	Health & Safety	<input type="text"/>	<input type="checkbox"/>
Customer Service	<input type="text"/>	<input type="checkbox"/>	First Aid	<input type="text"/>	<input type="checkbox"/>
Lead Generation	<input type="text"/>	<input type="checkbox"/>	Manual Handling	<input type="text"/>	<input type="checkbox"/>
Management	<input type="text"/>	<input type="checkbox"/>	Fire Safety Training	<input type="text"/>	<input type="checkbox"/>
Software Training	<input type="text"/>	<input type="checkbox"/>	Business Mentoring	<input type="text"/>	<input type="checkbox"/>
Social Media	<input type="text"/>	<input type="checkbox"/>	Stress, Anxiety & Confidence	<input type="text"/>	<input type="checkbox"/>
Sales	<input type="text"/>	<input type="checkbox"/>	Personal Mentoring	<input type="text"/>	<input type="checkbox"/>
Finance	<input type="text"/>	<input type="checkbox"/>	Team Building	<input type="text"/>	<input type="checkbox"/>

Additional information or other training expenses you may spend on that have not been mentioned.

Sub Total

Personal, Weird & Wonderful

	Amount	Priority		Amount	Priority
Hotels / Villas	<input type="text"/>	<input type="checkbox"/>	Dentists	<input type="text"/>	<input type="checkbox"/>
Travel Memberships / Concierge	<input type="text"/>	<input type="checkbox"/>	Opticians	<input type="text"/>	<input type="checkbox"/>
Restaurants	<input type="text"/>	<input type="checkbox"/>	Hair & Beauty	<input type="text"/>	<input type="checkbox"/>
Staff / Christmas Parties	<input type="text"/>	<input type="checkbox"/>	Dry Cleaning	<input type="text"/>	<input type="checkbox"/>
Chauffeur Services	<input type="text"/>	<input type="checkbox"/>	MOT & Servicing	<input type="text"/>	<input type="checkbox"/>
Family Events	<input type="text"/>	<input type="checkbox"/>	Car Valeting	<input type="text"/>	<input type="checkbox"/>
Sporting Occasions	<input type="text"/>	<input type="checkbox"/>	Driving Lessons	<input type="text"/>	<input type="checkbox"/>
Architect / Planning Services	<input type="text"/>	<input type="checkbox"/>	Trades People	<input type="text"/>	<input type="checkbox"/>
Charitable Donations	<input type="text"/>	<input type="checkbox"/>	Wills, Trusts, Lasting Power of Attorney	<input type="text"/>	<input type="checkbox"/>

Expense Profile Continued...

Additional information or expenses you may spend on that have not been mentioned.

Sub Total

Total Spend on Expenses

Additional Information


How many staff? PAYE: Contracted Staff: Directors:

What projects or capital expenses coming up in the next 3, 6 or 12 months?

What other businesses, timeshares, villas, apartments or additional property do you own? Please give details.

What hobbies you enjoy, sports teams you follow?

Trade Purchase Request

 Can't find what you are looking for?

One of the services BBX offers our clients is to source companies outside of the BBX community, engaging and enrolling them based on your needs.

Our results for you are enhanced if you brief us fully and therefore we invite you to complete the Trade Purchase Request form on our website. <https://bbxuk.com/bbx-trade-purchase-request/>

Note if full details of a supplier or prospective supplier are given, and we have been introduced, you will qualify for an ongoing ambassador income.

Expense Profile Continued...

Top priority spends

Here we identify your top priority spends and most importantly what is the number ONE priority spend for us to focus on and achieve for you. As we accomplish each group we will make further introductions. This is so not to overwhelm you with too many introductions that you are unable to follow up in a timely fashion.

Top ten priority spends

Top three priority spends

Top priority spend

☐

I acknowledge I have been taken through part 2 of the induction and understand in order to spend BBX money I have to be willing to use businesses in the BBX network which might involve changing my current suppliers.