

Subgroup D) Share resources

RD Notes on Ideas to better build & present joint products:

- Protocol for communication

Rule 1 – Answer each GGI communication at least within 24hrs even if to simply **acknowledge receipt**, indicating when you will give a definite answer as to whether you can handle such request or recommend the right firm or person for the job.

Rule 2 – Pass on the type of client or project you would appreciate someone passing on to you. **Act strategically** by focusing on GGI relationship building not short term fees, so treat a GGI request as a priority regardless of size. If it is a small job then it should be easier to start and finish, but always be realistic about fees and terms / due diligence and mandate requirements , - no surprises please !

Rule 3 – **Be 100% clear** that there is no hidden commission or fee, (unless it is a clear case of brokerage and therefore covered by a specific contract) but make sure the client is aware of exactly who is doing what, how and by whom he is being billed, and if things go wrong who is liable for what.

Rule 4 – Keep all people involved **updated in a timely and precise** manner. Follow through bearing in mind that as GGI members we all benefit or suffer by the quality of the clients or associates we recommend or collaborate with, so be careful about what business to choose in the first place however once a commitment is made treat it with your best attention.

- **GGI – USP**

One of the most important unique selling points is the GGI composition of individuals and smaller team that are better suited than larger firms in dealing with demanding clients such as owner-managers, or family offices where the element of trust and understanding is paramount. These are the type of clients who value the personal approach which a GGI firm can provide as it does not have the fast turnover of staff as a big firm, so clients can feel that the rapport built over time will not be wasted as faces change, but will achieve greater value and efficiency as the GGI firm grows with the client.

- Important to **explain more about own products.**

Efforts have to be made to use GGI events to find the right 'partner' for a specific service or project you wish to market internationally via the network. Do not simply leave brochures in a corner, nor throw out too much info at new contacts without proper research and preparation as to your audience. Listen and learn about the other's persons' priorities and

concerns before go into 'sell' mode. To best prepare the approach, use available materials contacts, GGI friends and GGI support, to find out who may best fit the profile of your specific project or target client base. Our advice is not to simply focus on your needs but to build a database of what the strengths are of the GGI persons you best connect with, and such knowledge will facilitate a quality result.

- **Share with other members the tools you have developed.**

We all want our clients to receive special treatment. The expertise of a GGI associate who has specialized in a particular field or solution is similar to an extension of our own team. However such sharing must be done in a careful way making sure there is full understanding on all sides about what aspects are fixed and which are variable and of course well tested before being tried. If something is an experiment it has to be treated with special caution and full knowledge of all participants. Liability Liability liability !

- **Know who: contact network.** Each office has special relation to experts, to particular clients – share that.

Even after one GGI event we have new contacts, but such personal meeting should not remain silent until the next possible GI meeting where one of you may or may not be there. The meetings should be the start of subsequent interpersonal and interfirm contact, so that the investment is not restricted to a one person risk, but maximized by the interaction of several members on either side. Also be very patient – good things take serious time and attention.

- **Business forum: focus on technical aspects**

Given the individual character of GGI firms as mentioned above, we are often not only service providers, but entrusted ambassadors for our best clients who trust us not only on a professional support level but also as experts in their business that are able to identify and facilitate new collaboration and acquisitions.

GGI is working on developing a live platform where members will choose to be updated on possible opportunities which are available where a GGI member's client is seeking a specific partner or investor or sale / acquisition of particular asset. As this develops GGI will be able to offer an increasing amount of new projects and clients with the important qualification of having passed a GGI member due diligence test and forwarded in a way that makes it efficient for one to be able to understand risk and potential because of commonly understood GGI parameters and definitions.