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# <sup>4</sup>THIS IS HOW CHANGE HAPPENS. ONE GESTURE. ONE PERSON. ONE MOMENT AT A TIME<sup>44</sup>

# Hello there!

Thanks for downloading Volta Consulting's services price guide.

Libba Bray

This document outlines my pre-designed packages, my additional services, and their respective prices.

If you can't see a package or a service that is perfect for you, send me an <u>email</u> or jump on a <u>Discovery Call</u>, and we can discuss your options.

Most of my services are delivered at fixed fees as I believe this delivers the most value. However, I offer hourly rates for those who feel more comfortable with this method.

I understand that sometimes cash flow may be a little tight. So, I do offer payment plans on most services. Please get in touch to discuss your requirements, and we can work out the details.

Marelle

Founder

# How the process works



01

### **BOOK A DISCOVERY CALL OR EMAIL ME**

Book a discovery call or send me an email to discuss your business, your needs, and how I can assist you.



#### **PROPOSAL SENT**

Once I understand your needs, I'll send you a proposal outlining your options, the fees involved and my terms.



### SIGN THE PROPOSAL

You will review the proposal and select your required services. Once you're happy, you can sign and return the proposal to me.



04



#### **PAY YOUR INVESTMENT**

I'll send you a deposit invoice for payment. Once the payment is received, your work will begin.



#### **WORK BEGINS**

Congrats! We're now ready to get started on delivering your chosen services,

# Mentor Strategy Sessions

Whether you are a sole trader who's started thinking about the next stage of your business growth. Or you're ready to map it out, start implementing and scale to the next level. You're probably not short of ideas...

Deciding which ones to prioritise for strategic development – and why – is where it can get tricky. Happily, that's exactly where I am in my element.

#### WANDOO MENTOR INTENSIVE

#### \$375 + GST

Take a deep dive into 1-2 of your most pressing business issues during this collaborative 60-minute session. With my detailed analysis and practical advice, you'll walk away with a clearer understanding of what needs to be done and an action plan you can follow.

Your mentor intensive session includes:

- a tailored Zoom session (60 mins)
- my summary and action plan
- 7 days of email or Microsoft Teams support after the session

#### JARRAH MENTOR BUNDLE

#### \$995 + GST

Plan your goals and stay on track with this budget-friendly bundle of 3 business mentoring sessions. You can use each session for a standalone topic or use the bundle for one bigger challenge or goal. Together we will discuss your situation, brainstorm ideas and devise a tailored strategy. So you are ready to take your next steps with clarity and confidence.

Your mentor intensive session includes:

- a tailored Zoom session (60 mins)
- my summary and action plan
- 7 days of email or Microsoft Teams support after the session
- a gentle nudge in between each session to keep you on track

# Mentor Strategy Sessions

#### KARRI - 3-MONTH MENTOR PROGRAM

#### \$3,995 + GST

My Karri Program is ideal for you if you need a business mentor to support you through a specific stage of your business. That could be scaling, a change in how your business operates or even an ongoing challenge you are working to resolve.

Together we will devise a tailored Action Plan for your business and work through it together. With plenty of touchpoints across our 3 months, this program helps you feel supported as you move forward.

The Karri program includes:

- 4 x tailored video call strategy mentor sessions (60 mins each)
- Recording of sessions
- A detailed action plan following our first session
- An update of your action plan following each subsequent session
- Weekly nudges to keep you on track
- Unlimited support via email or Microsoft Teams for the term of the program

This program is also available in 3 monthly instalments of \$1,500 + GST

#### **BESPOKE MENTOR PROGRAM**

#### **\$POA**

If you prefer a custom package solution, <u>reach out</u> today and discuss a bespoke option to suit your specific requirements and budget.

# Financial Strategy Packages

Volta Consulting will review and clarify your business position and objectives and help you master and develop a financial strategy.

Whether you're seeking to gain transparency on your financial position, looking to invest, or applying for funding, Volta has a package to suit. And, if you don't find one that fits, I can customise it to suit your specific requirements.

If you need additional help on your journey, Volta can assist in tracking your budget and cash flow and provide accountability sessions with actionable items so that you can monitor and understand your business performance and plan to reach your business's vision.

### BANKSIA

#### from \$2,750 + GST

#### **12-Month Financial Strategy**

Suitable for business owners seeking to implement a budget and track their cash flow for transparency, identify cash flow shortages, meet statutory requirements, and achieve their short-term business goals.

We work together to develop and implement a 12-month financial strategy for your business to provide clarity and comfort that you are maintaining a sustainably profitable business.

- Initial online meeting (60 mins)
- 1st draft online meeting (60 mins)
- Video walkthrough of the final strategy
- Summary of Strategy
- Review of business vision and short-to-long term goals
- Pricing review of up to 4 services
- Detailed month-by-month budget for 12 months
- Detailed month-by-month cash flow forecast for 12 months
- 1 round of amendments
- Summary of KPIs to be tracked
- Budget uploaded to Xero for future monitoring



# Financial Strategy Packages

#### WATTLE

#### from \$5,995 + GST

#### **3-Year Financial Strategy**

Suitable for the business owner seeking to scale or grow, requires an understanding of its current position, and needs a detailed roadmap for achieving its business vision over 3 years.

We partner to develop a 3-year financial strategy for your business. This package includes an analysis of your short-to-medium-term goals, considering how decisions impact the financial capacity of the business and ensuring more productive use of your cash.

- Initial online meeting (60 mins)
- 1st draft online meeting (60 mins)
- Video walkthrough of the final strategy
- Summary of Strategy
- Review of business vision and short-to-medium-term goals
- Pricing review of up to 4 services
- Detailed month-by-month budget for 3 years
- Detailed month-by-month cash flow forecast for 3 years
- 2 rounds of amendments
- Summary of KPIs to be tracked
- Annual budget uploaded to Xero for future monitoring
- Annual review and update of budget at the start of year 2 and 3
- Annual online meeting at the start of year 2 and 3 (60 mins each)

#### VALUE ADD ON'S

Done for you Monthly Updates	Update the budget versus actuals and cash flow forecast on a monthly basis. Includes summary report. Price is per month. From	\$400
DIY Monthly Updates	Video instructions on how you can update your cash flow forecast and monitor your strategy performance.	\$750

# **Bookkeeping Packages**

With Volta Consulting, you have the flexibility to tailor your bookkeeping package to match your business needs – and your budget. Bookkeeping packages are delivered remotely using cloudbased accounting software, Xero.

### SEED

#### from \$375 + GST per month

- Monthly bank account reconciliations (up to 2 accounts)
- Receive and spend money
  transactions
- Review account transactions and coding
- Up to 1 hour of transaction amendments
- Preparation and submission of quarterly BAS
- Management reports
- Liaise with tax accountant at end of financial year
- Liaise with ATO as required
- Email support

### Bespoke packages are available to suit individual business needs.

### SAPLING

#### from \$550 + GST per month

- Fortnightly payroll for up to 3 employees
- Receive and spend money
  transactions
- Match customer receipts
- Enter creditor invoices
- Match creditor payments
- Bank account reconciliations (up to 3 accounts)
- Review of account transactions
- Preparation and submission of quarterly BAS
- Preparation and submission of quarterly superannuation
- Quarterly management reports
- Annual wage reconciliation and single touch payroll finalisation
- Liaise with tax accountant at end of financial year
- Liaise with ATO as required
- Email support

### TREE

### from \$895 + GST per month

- Fortnightly payroll for up to 6 employees
- Receive and spend money
  transactions
- Match customer receipts
- Enter creditor invoices
- Match creditor payments
- Bank account reconciliations (up to 5 accounts)
- Review account transactions
- Preparation and submission of quarterly BAS
- Preparation and submission of quarterly superannuation
- Management reports
- Quarterly Accountability online meeting (40 mins)
- Annual wage reconciliation and single touch payroll finalisation
- Liaise with tax accountant at end of financial year
- Liaise with ATO as required
- Email support

# Additional Services



I offer a range of additional services to suit your individual business needs. If you can't see a service that suits you, please reach out and we can discuss a customised option. All prices exclude GST.

Consulting	Consulting hourly rate	\$250
Pricing Strategy	Review and design pricing strategy	\$POA
Board Reporting	Provision of management and board reporting services.	\$POA
Bookkeeping	Bookkeeping hourly rate	\$95
Bookkeeping Repair + Catchup	Bookkeeping repair and catchup work hourly rate	\$120
Bookkeeping Meeting	Bookkeeping meeting via Teams (40mins)	\$150

# Additional Services

Payroll + Superannuation	<ul> <li>Set up of employee (per employee)</li> <li>Set up a new employee in Xero</li> <li>Lodge tax file declaration with ATO</li> <li>Set up superannuation for business and each employee</li> <li>Review wage/salary compliance</li> </ul>	\$60
	<ul> <li>Process payroll (per employee, per cycle)</li> <li>Processing of payroll, including leave and entitlements</li> <li>Compliance with Single Touch Payroll</li> <li>Payment of payroll via batch payments (ready for your upload an authorisation into internet banking)</li> <li>Email payslips</li> <li>Tracking of entitlements</li> <li>Termination payments to ensure SuperStream compliance</li> <li>Annual reconciliation of wages</li> <li>Preparation and lodgment of annual data with ATO</li> </ul>	\$25
Xero set-up	<ul> <li>Set up Xero software, including - from</li> <li>Customised chart of accounts</li> <li>Integrate up to 3 bank accounts with bank feeds</li> <li>Register software with ATO</li> <li>Branded invoice template</li> <li>Branded statement template</li> <li>Invoice reminders</li> <li>HubDoc set-up (if applicable)</li> <li>Team access (if required)</li> </ul>	\$400
App Integration	Xero app integration - from	\$200



# About Volta Consulting

Hi, I'm Narelle Wilson – experienced small business consultant and founder of Volta Consulting.

Why work with me? Well, apart from my 11+ years of small business management experience, I'm shaking up the status quo of \*business as usual\* for small business owners.

My vision for Volta Consulting is to make sustainable business practices more accessible for Australian small businesses. So that building a profitable business with a positive social impact – becomes the norm – not the exception.

Before founding Volta, I worked in a private equity firm as their General Manager and Group Accountant for over 10 years. My role there was diverse. One day I could be conducting due diligence on an investment or reviewing a lease agreement, and the next, negotiating funding terms or drafting a cash flow forecast.

And, if you're into qualifications, below is a summary of my education:

- Master of International Relations (currently completing)
- Graduate Certificate in Gender, Peace and Security
- Graduate Diploma of Applied Corporate Governance
- Bachelor of Commerce (Accounting + Business Law)

You can read more about my experience via my LinkedIn profile.

In summary, I have experience in several industries and across all elements of running a profitable business. I aim to deliver value to my clients and empower them to build sustainable, profitable, purpose-led businesses to meet their objectives.

# Testimonials

## <u>BethWallach</u>

As a solo business owner it's so important to have a solid sounding board that you can rely on, not only for strategic business advice, but also for your sanity!

Narelle has been an invaluable support over the last year guiding the direction and growth of my business in a way that's empathetic, pragmatic and valuesaligned. I'm most definitely a healthier, happier business owner as a result of her services, and I look forward to continuing to work with her going forward.

Jenny - Positively Beaming

Narelle has been a godsend to my business. Her knowledge is broad from business planning to bookkeeping.

She sorted out my Xero files and provided excellent advice about how to keep them tidy and compliant. Her attention to detail is phenomenal and her communication excellent.



### **Jocelyn - Jocelyn Seamer Education**

Narelle understood where we were coming from as small business owners. She was able to explain things simply and really put us at ease.

We feel so confident with our financial set up now and really appreciate Narelle's expertise and guidance through the work we have done with her.

We look forward to Narelle being an ongoing support for us and our business.



### **Renata - AWEN Consulting**

Narelle is great to work with.

It was really helpful for me to have the financial strategy well done from the beginning and clear steps how could I achieve the business goals.

I highly recommend working with her

# Let's Get Started!

Found something you are interested in learning more about? Or perhaps you have a few questions before you decide to proceed.

Then book in your free 20-minute Discovery Call or send me an email.

### **SCHEDULE A CALL**

### SEND ME AN EMAIL

Thanks for considering Volta as your business consultant.

I look forward to hearing from you when you're ready to begin your journey to a profitable and purpose-led business.

Narelle

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