


Details Input Date	8th August 2023
Business Name	Invest Wholesum Pty Ltd 
Business Overview	<p>We are an Australian digital ethical, impact-focused investment platform that allows novice to experienced investors to generate income with purpose from as little as \$100 with no fees.*</p> <p>Operating through a “fund of funds” model, Wholesum enables investors to access a diversified global portfolio of ethical ETFs and unlisted funds that create positive impact via activities such as small and medium-sized enterprise, microfinance and interest-free home financing.</p> <p>Our name comes from a play on our wholesome approach and our financial goals for customers, leading to a “Wholesum” investment. We attempt to promote the “Whole Sum” effect through financial empowerment for investors, positive social and environmental impact via our investments and we donate 1% of our gross revenues to social and environmental philanthropic causes.</p> <p>* Investing fees payable when balances are >\$1,000.</p>
Project Title	<p>Project 1 Institutional partnerships Partnership strategy to provide ethical investment solutions for institutions that wish to generate additional income and are interested in positive impact as per their sustainability missions (e.g., non-profits, charities, community organisations, religious institutions, schools, mission-driven businesses, impact and ethical-focused investment funds)</p> <p>Project 2 Social media engagement Customer acquisition and growth via an effective social media strategy to engage with online users.</p>
Project Description	<p>Project 1: B2B Institutional Offering <i>Question to answer:</i> How should Wholesum develop a go-to-market strategy to offer investment solutions to target institutions?</p> <p>Key activities:</p> <ul style="list-style-type: none"> - Evaluate market size for potential business clients from education, non profit, and small / medium businesses. - Validate customer pain points and whether there’s a valid problem to solve with Wholesum’s intended offering. - Determine prioritisation criteria to evaluate target customer segments (Note segmentation can be at the channel level, e.g., education vs. non-profit, and customer size level, e.g., revenue, employees, users, etc.) - Benchmark Wholesum’s proposed offering against other players to determine competitive advantages - Evaluate methods of go-to-market strategy with each target B2B customer segment <p>Project 2: Social media engagement <i>Question to answer:</i> How should Wholesum best utilise social media to engage with its target B2C market and originate new customers to join its investment platform? (Note, B2C are everyday retail investors, particularly 18-45 year-old millennials)</p> <p>Key activities:</p> <ul style="list-style-type: none"> - Assess current overlap between target customer usage of social media and social media’s usefulness to attract and engage on personal finance, particularly investing - Evaluate alternative social media platforms for their effectiveness to engage on personal finance, particularly investing.

	<ul style="list-style-type: none"> - Develop strategy for Wholesum to engage with 1-2 prioritised social media platforms as part of the goal to increase waitlist over 1 year period to 10,000 potential customers - Develop menu of content (both informative and marketing) that Wholesum can cycle through the prioritised platforms to grow waitlist and engage with interested customers.
Project Deliverables	<p>The team should be able to <u>demonstrate an understanding of</u> and produce the following outcomes:</p> <ul style="list-style-type: none"> - <u>Defining target customer segments and aligning customer needs</u> with positive business outcomes - Go-to-market strategies to target prioritised customer segments - Successful social media engagement techniques - Market sizing of opportunities - Competitor benchmarking and value proposition appraisal <p>The team should provide the client with:</p> <p>Project 1: Institutional partnerships</p> <ul style="list-style-type: none"> - Research survey / questionnaire and analysis report of B2B customer requirements and challenges with investing - Quantified estimation of market sizing (e.g., revenue, number of customers, etc.) and recommendation of which segment to focus first - Competitor benchmarking matrix against key requirements of B2B clients and their current offers - Report on B2B client go-to-market strategy, requirements and outline of implementation steps <p>Project 2: Social media engagement</p> <ul style="list-style-type: none"> - Report of social media channels, their effectiveness in target customer engagement and recommendation on which channel Wholesum should use - Benchmarking evaluation of alternative investment funds' social media engagement (e.g., investment fintech start-ups, established investment funds, impact-focused funds, etc.) - Report on Wholesum's social media strategy outlining how Wholesum should engage target clients and best practices to ensure effective waitlist generation and customer engagement.
Contact Person/s	<p>Dr Tanvir Uddin Founder & CEO Phone: +61 2 6190 9626 Whatsapp: +61 436 276 008 Email: tanvir@investwholesum.com</p>
Other Information	<p>We recommend:</p> <ul style="list-style-type: none"> - Refreshing your knowledge about investments – particularly impact and responsible investing, types of investors and types of investment assets. Moneysmart and Investopedia are excellent sources. - Examining how other funds manage social media engagement and institutional clients (e.g., Australian Ethical, Future Super, Raiz, Spacehip) - Determining how target institutional clients manage investments (e.g., for charities, see Plan, Oxfam, SavetheChildren, etc.)