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PLACE

ADVO FRANCHISE

EMPLOYEE BENEFITS

HUMAN RESOURCES

PAYROLL

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ADVO-ONE

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WELCOME

#WORKASONE

If you're reading this, you may be thinking about making a change.

You're capable, committed, professional and hardworking, you're good at what you do but you want more. More flexibility, more time with the kids, more time to look after relatives, more money, more control, a better life for you and your family, a better balance to go along with improved wellbeing.

How do I know? Because that need for change means you're like the rest of us., I, too wanted to get away from the daily grind, the commute, the routine. Home lives change; the kids grow up, parents need more support, partners re-locate, financial security becomes more important. Everyone here had their own reasons, but we all wanted the same thing – freedom, but that's not all (it never is, is it?), also needed is support. The support that comes from working alongside other like-minded professionals.

Reading this prospectus could quite easily be the first step in creating the life and business you have envisaged. It will explain how, as part of advo, you can have the freedom that comes from being your own boss and starting your own business and the support of a special team of people who are on your side and ready to improve your chances of success. Yes, it's a franchise and yes, we know what thoughts that conjures up – but don't stop reading, just because one word doesn't sit right. Find out what the reality is first – it's much better than you might expect and hopefully you will agree with us that it's your perfect business solution.

In the end though, there's no substitute for a real conversation. Once you've had a read through and if you're genuinely interested, get in touch. A chat is without doubt the best way to help you decide if a partnership with advo is right for you.

Whatever you do, we wish you the best of luck for the future.

Larry Bulmer, CEO



There is a wealth of experience across different industries amongst the team, and the franchisees meet regularly to discuss ideas, good practice and support each other.

Tarnya Brink, advo franchisee partner

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OWN AN ADVO HR FRANCHISE

LIVING THE DREAM

OK, so that might be pushing it a bit. There's no doubt that working for yourself has some great advantages, but, as with anything, things don't always run smoothly. So, if you could find a way to make sure there were more ups than downs then you would, wouldn't you?

Let's look at how that works in reality.

Working for yourself gives you control. You choose how, when and where you work, you choose what work you do (and what you don't), you decide how big, or small, you want your business to be. You choose the clients and we will share our brand and support.

It also means that you're likely starting from scratch. You need to set up a business, sort out the VAT, set up your IT and learn how to use it, create a website with marketing materials, find out what works and what doesn't when it comes to marketing and selling your business, find and sign up some clients, keep them happy, raise their invoices, make sure they pay and somewhere amongst all that you've actually got to fit in the work they are paying you to do.

What if your clients insist on indemnity insurance? What if they have concerns about data security, what if they need a new suite of documents creating, an HRIS setting up, or access to legal advice, training, coaching, strategic direction? The list goes on and it's incredibly unlikely you're a pro at it all – no one could be.

Who do you bounce ideas off if you're unsure about the best way to tackle a problem? If you're not completely sure about the impact of the latest legislation on an already complex situation? If you're struggling with cash flow because that promised payment never arrives? Who covers for you when you're on holiday?

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IT'S NOT IMPOSSIBLE, BUT...

There's so much to know, a huge amount to learn - it all takes time and lots of it needs funding too. We're not saying it's impossible because it isn't, many others have been through this before you, but if you could give yourself a pretty big advantage why wouldn't you? And that's where joining the advo team comes in.

We give you the opportunity to step into your new business venture with everything needed at your fingertips.

JUST IMAGINE...

...you're now an advo hr franchisee.

As our business partner you will have your own clients – all sizes, all shapes, different culturally and commercially and all with their own issues. You'd be tested that's for sure, it's not an easy life but as you are outside their office politics you can concentrate your time and thinking on doing the right thing, the right way.

...And you really can concentrate on that – we take care of so many other worries for you. We take care of the hassles of setting up and running your business and help you to create multiple income streams.

- ✔ We take care of all your IT needs – we supply everything and keep things working. This allows you to be ISO 27001 accredited assuring your clients confidence over handling their data and your cyber security.
- ✔ Invoicing & cash collection – no one likes chasing for money and you won't have to, we'll raise all your invoices and collect payments. You're free to concentrate on the 'day job'.
- ✔ Your own client management system, fully compliant with ISO27001 to allow you to store, access and record all client data and information safely and securely.

- ✓ Indemnity insurance: advo offers a unique HR liability indemnity insurance that enables you to continue to deliver commercially sound, practical advice so your client won't find themselves shackled by call centre legal advice at a critical time.
- ✓ Selling and marketing: Our training and wide bespoke support will leave you confident and with a tried and tested route to success.
- ✓ Current HR documentation: A full suite of documents ready and waiting so you don't have to start from scratch.
- ✓ Peer support: You are never alone, help is always at hand, no matter what tricky situations you have to tackle.
- ✓ Marketing and social media support is available for you to use from day one. That's everything from your own website through to printed business cards, pop-up banners to leaflets and folders and an online presence. Your own email address, branding, stationery, perhaps you would even like your own branded clothing to promote your business.
- ✓ Legal advice: Our key partnerships with established law firms mean there's always someone to call when you need it most.
- ✓ Holiday & sickness cover: When you're away we'll provide cover so that your clients continue to receive the individual attention you would give. That means the client base you worked hard to build is supported and protected even when you're out of your business.
- ✓ Wider range of products & services: Combining your skills and experience with our expert team means together we can offer a comprehensive service including coaching, recruitment, executive search, psychometric testing, formal legal advice and strategic development – that beats the limited range of HR admin and compliance products provided by your local competitors, hands down.

AND THERE IS MORE...

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ARE YOU STILL IMAGINING?...

- ✓ As part of advo you are also able to provide additional essential services for your clients. This includes payroll and full auto-enrolment solutions, independent employee benefit management and wellness programmes. These are all linked together through our 'one' technology platform, including offering your clients their own HR absence management and employee portal, as part of your offering. Offering these wider linked essential SME services creates secondary passive income streams.
- ✓ To help your business to grow and flourish we will supply locally targeted business leads generated by advo's business development team and access to exhibitions, marketing and social media. Don't worry if you are new to selling as help and business mentoring is there with our professional people at hand to help support you in the early days until you find your stride.
- ✓ Moving from an employee to business owner you will have lost your company perks and benefits. As an employee benefit specialist, we help you with replacing these essentials with many duplicating advo own staff benefits.
- ✓ Continued professional development is key in keeping up with a fast-moving business environment. You will be able to participate in advo training courses and our wider professional development programmes.
- ✓ But let's also not forget social interaction too with your business colleagues. Being a business owner can at times be lonely. As an Investors-in-People Gold employer advo has a reputation for looking after their people through social and charity events and run a number of team building events throughout the year. We are as professional as you can be, but fun to work with too.
- ✓ As you run your practice and expand your client base your business will over time build up a capital value. If or when the time becomes right for you to exit, advo could buy your business allowing peace of mind that your clients will carry on receiving the same great support and you walk away with a lump sum that reflects the value of the business you created.



WE KNOW IT'S A BIG DECISION

WE MADE IT 20 YEARS AGO...

Chances are, you've lots of questions running through your mind and that's only natural. Let's start by answering a few that everyone asks.

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WHO ARE ADVO?

advo is short for advocate, people who can speak and act on our clients' behalf.

We are a multi-award-winning employer services company and Investors in People Gold employer established in 1998. We specialise in payroll, HR and employee benefits, backed by expert advice and our own unique advo-one technology platform. advo supports over 1,500 employers, including household names, both UK and internationally.

The HR team are based out of Cheshire and Maidstone, delivering essential and practical support to a broad range of employers and their staff and supporting the local HR Franchisees and their own teams up and down the country.

We know we cannot be all things to all people, but we do know from many years of experience that SMEs find our involvement in their business an important part of their success.

WHAT WE ARE ALL ABOUT

advo offers a service that is above and beyond – it's the support that you would like to get if you were a client with a problem. When our clients need it, we're there – a real person with a name and a personality, someone they have built a relationship with, someone who understands their business.

We're not a disembodied voice at the end of a phone line reading their legal obligations from a screen. We're commercially focused and practical - we find specific solutions which work for our clients - we solve their people problems.

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WHAT SORT OF CLIENTS DOES ADVO HAVE?

Our client base is varied in size, sector, management style, location, need and just about every other way you can think of. The common theme however is that these will be businesses that want to focus on looking after their people.

Most of our clients are SMEs, but those SMEs that realise that rewarding and supporting their staff adds to their own success.

The mix means the work, and the income from it, is largely balanced – there's security and a steady income which is a relief, after all, the mortgage isn't going to take care of itself is it?

Our clients tend to be loyal, of course not every client will stay forever but almost all stay with us year after year because they like what we offer, the way we work and the value they get for their fees. So, that means by following our model, it's not just a steady income over the year, you have security too as you build value into your business.



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WHAT IS EXPECTED OF ME?

We've worked really hard to build our reputation, to make sure we stand out by being great at what we do, so we want to know you are as dedicated and like-minded as us when it comes to providing a first-class service for clients.

You will be a CIPD qualified HR professional or have an equivalent qualification with long standing and varied commercial HR experience and enjoy working with people. You will need to be a person who, like us, is driven to learn new skills. Someone who is diligent, engaged, ambitious and a really good communicator at all levels.

As a team we call ourselves 'advonians'. We are a mixed bag of personalities but all share in being committed, innovative and passionate, about the job we are doing and who we are doing it for. We would expect you to share these attributes.

First, we need to get to know you, this is a two-way street – you need to feel that advo is right for you and, likewise, we need to know the chemistry is right and see you as our long-term business partner. If you are the right fit then we'll let you share in our business model and support you every step of the way.

YOUR FINANCIAL COMMITMENT

We understand personal circumstances may differ. This is why we have a wide range of funding options to suit both existing businesses that wish to move to advo for better support, through to new business start-ups.

The options vary, for example you may opt for a larger upfront payment and pay lower ongoing monthly support fees. You may choose to hang onto your start-up money and pay slightly higher maintenance fees. There may be many obstacles to setting up a new business but when working with advo money is not one of them.

THE DETAILS

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THE DETAILS

Whether experienced in business or starting on your own for the first time our approach lets you hit the ground running...

SETTING YOU UP

- ✓ Your company set up and formation – we set up a company name for the franchisee and get it all registered at companies house.
- ✓ We will complete all your VAT registration forms.
- ✓ Pre trading support.
- ✓ An advo laptop with docking station and second desktop screen. By using advo maintained technology you can become part of our ISO 27001 accreditation giving your clients peace of mind over data management and cyber security.
- ✓ Microsoft Office Professional.
- ✓ Anti-virus software.
- ✓ A colour laser printer / scanner.
- ✓ Up to 4 advogroup.co.uk e-mails.
- ✓ Professional, secure e-mail archiving.
- ✓ A fully protected and trademarked brand.
- ✓ Your own HR website linking to advo support services, news & social media.
- ✓ Full professional liability cover.
- ✓ Your own local landline number that routes to your chosen mobile and allows call recording and archiving.
- ✓ Flexible financial support.

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YOUR EARLY DAYS

- ✓ Comprehensive training – You may be an HR expert but when running your own business, you need to be able to connect to new clients and sell the benefits of your services over your competitors. You will have the opportunity to accompany advo people on appointments to help with your sales experience. You will be given training across the advo services as well into business and financial awareness.
- ✓ In-field support – This is vital in getting your business going. We know that the first few months will be the hardest and so having experienced people working alongside you in the early days until you find your feet is crucial to your success.
- ✓ Business mentoring with the opportunity to work with a business ‘buddy’. We have found over the years that having someone who has already done what you are doing by your side helps you to learn essential skills quickly. You will have a principal point of contact that helps you day to day in the early days of running your new business.
- ✓ We will provide you with indicative pricing and a compliant Service Level Agreement for you and your clients.
- ✓ For your first three months and at future agreed intervals, we will allocate time from our business development team to target your local businesses with your bespoke message.

ON GOING TRADING

- ✓ Full support for your advo IT systems. You will have the backing of our IT team. This ensures your technology is current and available online for your clients.
- ✓ Your own client management system.
- ✓ Access to client reporting templates.
- ✓ Holiday & sickness cover: The confidence that your business will not be affected by holidays and sickness. This will be a pre-agreed number of days within your agreement.

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ON GOING TRADING

- ✓ On-going support – encompassing meetings, seminars and regular contact with your peers.
- ✓ Access to marketing support to create and implement campaigns.
- ✓ Access to a constantly updated document library.
- ✓ Ability to offer clients ISO 27001 cyber security for data giving client confidence in ensuring data confidentiality, legal compliance and control.
- ✓ Access to legal advice.
- ✓ Access to reduced rate psychometric testing.
- ✓ The ability to offer your clients end-to-end recruitment solutions.
- ✓ Monthly client newsletters & quarterly client magazine.
- ✓ Important update emails to you and clients as things change.

FINANCE

- ✓ Your invoicing & credit control is taken care of to allow you to focus on growing your business and looking after clients.
- ✓ Access to advo's finance portal to manage and track your earnings.
- ✓ Drawdown received sales fees and income at any time.
- ✓ A Direct Debit facility for client payments included free of charge.
- ✓ Business funding advice.

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MARKETING

- ✓ Use of your own Prospects Management System to manage upcoming business growth.
- ✓ Establish your online social media presence and ongoing guidance.
- ✓ Bespoke Stationery. Your own letterheads, compliment slips and business cards etc.
- ✓ A wide range of additional marketing material – Apart from the essentials of business cards, letterheads and your online presence, there are a wide range of other possibilities to match your business and marketing approach. This could include pull-up displays, giveaways and fleeces / T-shirts.
- ✓ advo has its own in-house design and marketing team which can help you tailor your message.
- ✓ Trade show attendance – You can accompany advo at trade shows. There will be support available for your local marketing initiatives and could include local trade shows or events. This will on a rota basis, but we are keen to support your business to achieve sustained growth.
- ✓ You will benefit from advo's national and local targeted advertising campaigns. advo runs a telesales department. Local contacts and appointments could be passed across whenever apt.
- ✓ There are options for you to promote your business through contributing to news articles across social media channels and advo's quarterly magazine.

PROFESSIONAL DEVELOPMENT

- ✓ Access to technical expertise when required with peer support.
- ✓ Access to relevant training and advo group training courses.
- ✓ Legislation updates.

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ACCESS TO COMPANY BENEFITS

As part of a larger organisation, advo will provide some of the benefits you received as an employee. Some such as access to Employee Assistance Programmes and our own popular retail discount savings scheme, PERKS, will come as part of your Franchise agreement. As advo is an independent benefit specialist there will be options for wider benefits such as private medical insurance and other wellbeing benefits.

EXIT STRATEGY

As you become successful and the number of retained clients grows, your business starts to accrue a capital value. As an advo franchisee when the time is right for you to retire or move onto a new challenge you will have the option for advo to bring your practice into the group and receive market value.

- ✓ Your clients continue to receive the same high standard of service.
- ✓ You receive a market capital value payment.
- ✓ Your clients can continue to use the same systems and access the same broad range of services, many of which are not available through other franchises.
- ✓ You can leave the business in safe hands with complete peace of mind.

REVENUE STREAMS

There's more There is extra income on top of your HR fees and retainers to be earned too... Additional income can be earned from the wider employee and employer services delivered by the advo. You may refer for full payroll services including BACS and full auto-enrolment support, through our HMRC approved payroll systems and our people experts. There is also Independent employee benefit and wellness programme advice delivered through advo's award-winning team of experts. In addition, the introduction of staff portals and online management platforms can generate more additional income.

The advo-one platforms will be a popular addition. The linked HR absence management, payroll and employee benefit management platform that allows individual employee portals, backed by expert advice, enables you to offer a unique technology solution.

As all these wider services are all under the same roof you have control over the complimentary services delivered to your clients and quality and service delivery will not be a concern. To summarise your business income will include:

- ✓ Your HR expertise and abilities backed up by peer support.
- ✓ Additional income streams on successful payroll & BACS service referrals.
- ✓ advo's own end-to-end recruitment service for clients which generates additional income streams and client loyalty.
- ✓ Ability to sell the unique advo-one system to and other HR platforms to clients earning additional income streams. The advo-one system allows linked HR, payroll and employee benefit management with bespoke staff portals.
- ✓ Additional income streams on successful employee benefits referrals.
- ✓ An option for full HR administration outsource service for sale to clients.

The advo hr franchise ensures you have all the benefits and support of a larger organisation with the freedom of running your own business.

Your success adds to our success and so we do all we can to make sure your business is the best it can be.



advo have always been on hand to quickly deal with any queries or issues we may have. They always go above and beyond with advice and I usually come off the phone knowing even more than what my original query was.

The Advanta Group

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WHAT YOU CAN OFFER YOUR CLIENTS

- ✓ Your expert advice (backed up by a peer advice and support) & reinforced by written reporting.
- ✓ HR absence Management, available free to your HR clients and wider linked payroll & employee benefit platforms and individual staff portals.
- ✓ Always current business IT and communication technologies.
- ✓ Access to wider essential people support for employee benefits, payroll and technology platforms.
- ✓ Bespoke client marketing and wider employee communications.

HOW MANY CLIENTS WILL I NEED?

WHAT DO I CHARGE THEM?

We recognise these questions boil down to ‘How do I bridge the gap?’ i.e. how long will it take me to replace my steady month-in, month-out salary and there’s no denying that’s an important point to cover.

The good news is you won’t need that many clients, between 10 and 15 usually have you at full capacity depending on their requirements. We’re talking about retained clients here – those who have signed for a year or more. Running around constantly looking for new project contracts and interim work is no fun at all and it’s not the way we operate. We value what we have and do all we can to grow on this.

HOW MANY CLIENTS WILL I NEED? WHAT DO I CHARGE THEM?

That means it's about how long it takes to find them but remember, we have a thriving practice of our own, we've been doing this a long time, we know where you should be looking for clients and what they will pay for and how much you should charge.

We're in this together – we want you to be successful, we're hands on, we'll train you, open doors, give you credibility and extend your service offering. You're more likely to secure new business as part of a larger, well-established business with recognised credentials, rather than as a start up with a limited track record. It's harsh but it's reality. Imagine you're sat on the other side of that table, you're the client, what would you prefer?

There's something else to bear in mind, these clients mean you have a business not a job. Your business provides more than an income, it also has a value – you can sell it if you want to.



As a small business without a dedicated HR department we use advo to gain advice and make sure we are following legislation and best practice. Along with an annual review of all our HR documents and policies and regular monthly updates, advo are always on hand when any HR issues arise within our business. They are readily available to provide us with the advice needed and the correct action to take. advo always respond quickly to any enquiries and have a friendly and professional attitude.

Richard Thompson Insurance

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WHAT COMES NEXT?

Now what? Firstly, a thank you for starters. You didn't have to show an interest in us or download this prospectus, or read this far. But you did, so thank you. We hope it's answered lots of your questions about whether joining advo hr is for you. If you think it is - or that it might be - the next step is to have a chat with us. Get in touch, either by email or phone and we'll find some time in the diary that works for both of us.

Before you make a decision, you may wish speak to some of the team who has gone through this before you.

You can reach the office on 01622 769210 or email us at franchise@advogroup.co.uk with your phone number. Either way, we really look forward to speaking with you soon.

But whatever your next move, we wish you success.



On joining I had considerable HR and management experience but had never run my own business. It became clear on starting my induction training that this was the best decision. I doubt very much I would still be in business today if I had not taken up the opportunity with advo.

Cath Blanchard, advo franchisee partner

MY FRANCHISE JOURNEY

BY PIPPA DENNITTS

FEBRUARY

This time last year I was thinking ‘What have I done?’ And ‘What do I do now?’ having made the commitment to start my journey as a franchisee, done my 1-week training and got home with a box of marketing bits, a pull up banner and a brain full of mush. What was it that I was supposed to remember about marketing and business planning and building relationships? A vague idea that to have 10 retained clients by Christmas might be fun.....

MARCH

Fast forward a month and I had two client project orders. One of my client orders decided to postpone until later in the year. Little did I know then that this disappointment would turn into a real positive for me.

APRIL

Fast forward two months and I had my first retained client. Keeping a real focus on making connections, building relationships and helping people – all skills I’ve really honed since becoming a franchisee.

MAY

Retained client number two and some good-sized project work to keep me busy.

JUNE

Now up to three retained clients

JULY & AUGUST

A large part of July and August was spent in various parts of the UK in our campervan. Managed to fit in a family visit to the Scottish Borders, time on the Suffolk Coast and Cambridge. A lot of time spent working, drinking gin and mountain biking in broadly equal measures.

SEPTEMBER

Four retained clients now on my books and two more proposals out. Think I’m starting to get the hang of this...

OCTOBER

15 hour days including weekends, back to asking myself ‘What have I done?’. 6 retained clients and that project client from February came back & I managed to complete the project work and turn them into a decent sized retained client as well. I know that the skills I have developed over the past few months enabled me to turn that opportunity into a win.

NOVEMBER

Eight retained clients, no let-up in the workload, but it will be Christmas soon. Really appreciating the feeling of having my own business with a great support network built in.

DECEMBER

Nine retained clients and then number 10 signed up on 21 December to start in January – Hurrah! A major milestone reached. My Christmas break was spent taking stock, analysing my client base and figuring out how to get more of those clients I love and can add most value to.

JANUARY

Another new retained client, one I felt I actively played for and won. Fitting my ideal client profile perfectly – she shoots, she scores!

FEBRUARY

A brief moment of reflection and gratitude. Many, many thanks to my wonderful franchise colleagues who have been there all the way with me. Also, to my fabulous husband who has suffered every high and low, excitement and insecurity. Thanks also to those at advo that I’ve had the genuine pleasure of working with and I’m looking forward to getting to know more of you better.

Oh, and that disappointment I had in March, which turned into a great win in October are now looking at a service upgrade and will be my biggest client as of March. What a great year!

Pippa Dennitts, advo franchisee partner, 2021



Head office

advo house, St Leonard's
Road, Maidstone
Kent ME16 0LS

Tel 01622 769210
info@advogroup.co.uk

Oxford

8 Old Station Yard, Abingdon,
Oxfordshire OX14 3LD

Tel 01622 769210
info@advogroup.co.uk

Newhaven

46b Newhaven Enterprise
Centre, Denton Island
Newhaven BN9 9BA

Tel 01273 916363
info@advogroup.co.uk

advogroup.co.uk | info@advogroup.co.uk



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