chartergroup

IN DEVELOPMENT

Charter Connect

Introductions to the clients you want. A service we're developing.



Damian Reed
Head of Brand and Marketing



Charter Connect

the clients you want, in your diary

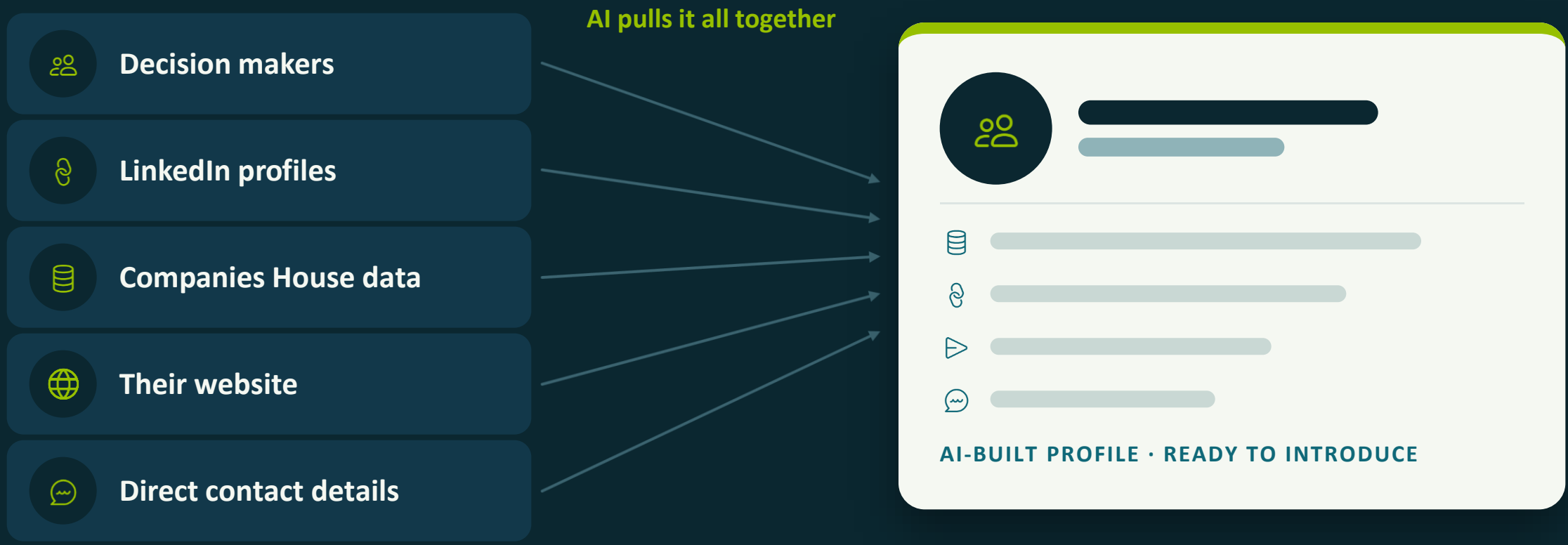
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Choose the clients you want

- **Audit reviews**
- **Competitor clients**
- **Chartered and specialist tax, such as R&D**
- **Target sectors**
- **Growing businesses nearing audit thresholds**

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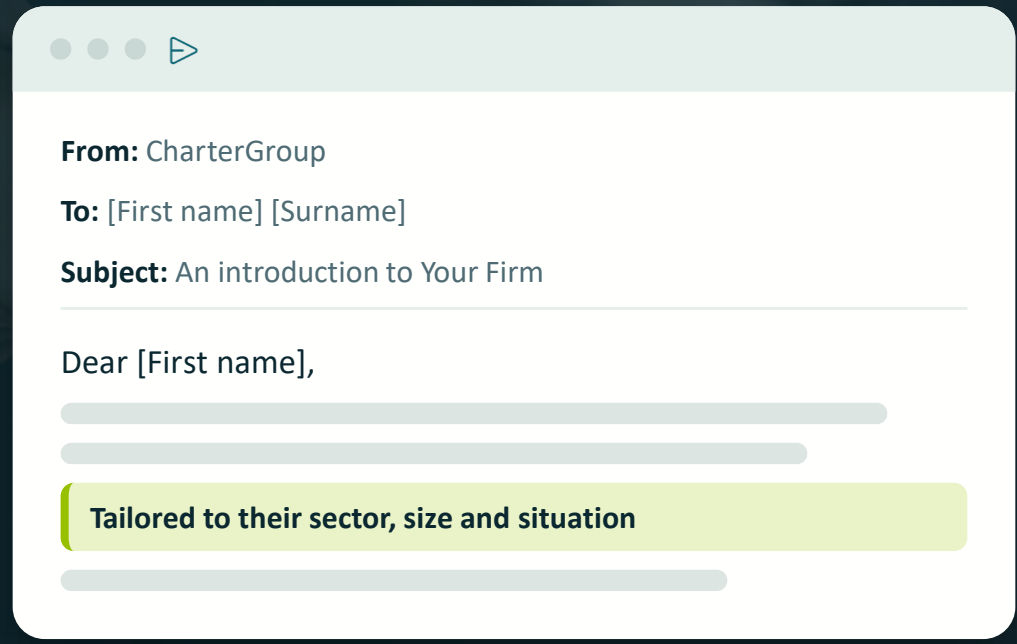
Every business, researched first



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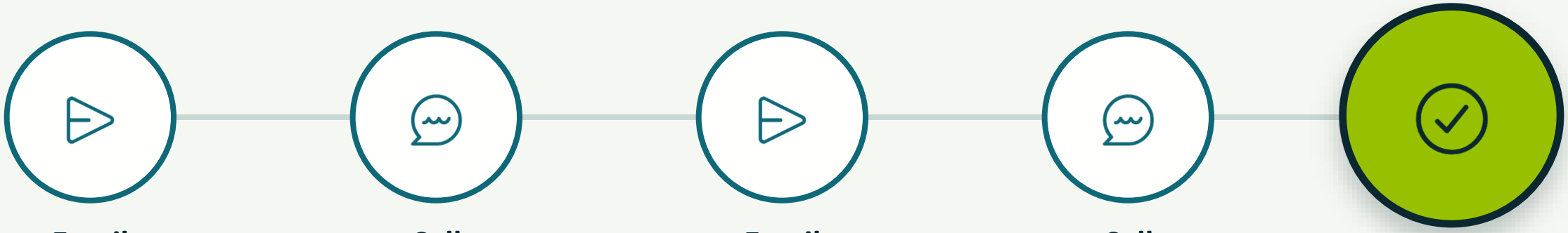
Introduced by CharterGroup, on your behalf

1. You guide the message
2. We write the templates
3. AI tailors each email to the recipient



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A sequence with one goal: an introduction to you



Every email links to something useful: a landing page, a calculator, a guide or a form

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Every email offers something useful

Landing pages

Built around their sector and situation

Calculators

Quick answers to questions they already have

Guides

Practical reading that's useful on its own

Forms

An easy way to ask a question or book a call

Every click tells us something

So each introduction starts in the right place

CHARTER CONNECT · IN DEVELOPMENT

A meeting in your diary, and everything you need for it

Teams meeting in your shared calendar

Handover document for every meeting





CHARTER CONNECT · IN DEVELOPMENT

Optional, flexible, built with you

- In development, shaped with members
- An add-on, separate from membership
- Minimum four months
- Run in close partnership with your firm

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IN DEVELOPMENT

Charter Connect

Help us shape it: tell us the clients you'd most like to meet



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