



How to tell your story to investors

Services Guide



Welcome to Bravo Charlie

There are plenty of 'impact' businesses and funds out there - though making sense of which projects are working and why, how they are measured, and which are pure greenwash, is holding investors back from supporting them.

Separating yourself from the noise by telling credible stories is key to unlocking this money, which is why we leverage your experience, insights and success to create engaging moments that act as powerful anchors your investors can rally around.

We develop your strategy, optimise your digital marketing, then produce video content and investor engagement platforms, all aligned with your business objectives. And because of our skill and expertise, we do it beautifully, so your communications resonate with the emotional core of your stakeholders.

Read on to learn more about how the team and I can assist, then get in touch.



A handwritten signature in white ink that reads "Philip Bateman".

Philip Bateman
Managing Director



Asking better questions to create actionable plans that work



You're in the right place if you're a proactive change maker, your company is at a tipping point, has a strong offering, and you're ready to launch into the next stage of your greatness.

To support your growth, we specialise in:

- Pitch reviews
- Strategy and storytelling
- Communicating your impact
- Video production
- Capital raising partnerships
- Ongoing strategic advisory
- Conference speaking, panel hosting, board education and workshops

We are renowned for making complex businesses and technologies simple to understand, whilst coaching senior executives to deliver at their best on camera. We capture the passion of teams and clients, then delight and motivate stakeholders to act.

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Strategy, Marketing and Videotm



Our work is underpinned by our SMVtm process which focuses on creating effective strategy to achieve your business objectives, reviewing and improving your digital marketing systems, then creating the video storytelling to engage your target audience, and compelling them to act.



The outcomes of our work include:

- Simplifying complex technologies and businesses
- Increasing attention from investors
- Effectively pitching businesses
- Increasing investment
- Improving company valuations
- Supporting businesses through the IPO process
- Closing deals and partnerships with industry and government



Key things to know about working with me

- You work with my team of experts and I, not junior consultants.
- My work is based on your objectives and the strategy we devise, not templates.
- I'm focused on successful outcomes, it doesn't matter how many hours or meetings it takes.
- I'll bring 20 years of learning across IT, business development and storytelling to your project, including over 100 projects completed through Bravo Charlie, which underpins our SMVtm process.
- Your stakeholders and clients will be delighted with the videos and collateral we make for you.
- Your senior executives will learn the skills to dramatically improve their public speaking.
- I'm available for same-day responses whilst we are working together.
- Your growth and success are important to me, at 3 and 12 months, we'll evaluate your success.





Pitch Review

If you're out there looking for seed funding, Series A and B funding, generally pitching investors in person or remotely, or if you've got a complex business or technology and want to make it simple to understand, I can help.

Send me your pitch for review and I'll quickly identify if there are ways to improve your message and get the money you're looking for. That might mean structural changes, condensing elements or making your messages more compelling.

A half an hour of my time before you spend weeks speaking to hundreds of investors **will dramatically improve your chances of accessing the capital you're seeking**, so you can make the change you want.

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I first came across Philip compellingly presenting how video communication can be used to build and share powerful narratives at a major international water management event in 2020 - subsequently I engaged him to build the logo, website, prospectus, and video communication for Circular360.

I was most impressed with his grasp of the finer nuances of storytelling, visual communication, brand creation and the various technology platforms, and backed by his professional team, the output was of the highest quality.

Hemant Chaudhary, CEO, Circular360,
The Global Centre of Excellence in Circular Economy





Strategy and storytelling

When you are asking organisations for a significant investment, they deserve best-practice digital marketing, branding, and video production that concisely captures your story and articulates the impact you are making.



You need to ensure you are accessing the right people, which is why we start with a discussion on strategy. What is your intended end state and how do we get there?

This will shape some of the most powerful aspects of our work together, which is figuring out where you are in the market, what your unique story is, the resources you have available and how they can best be leveraged.

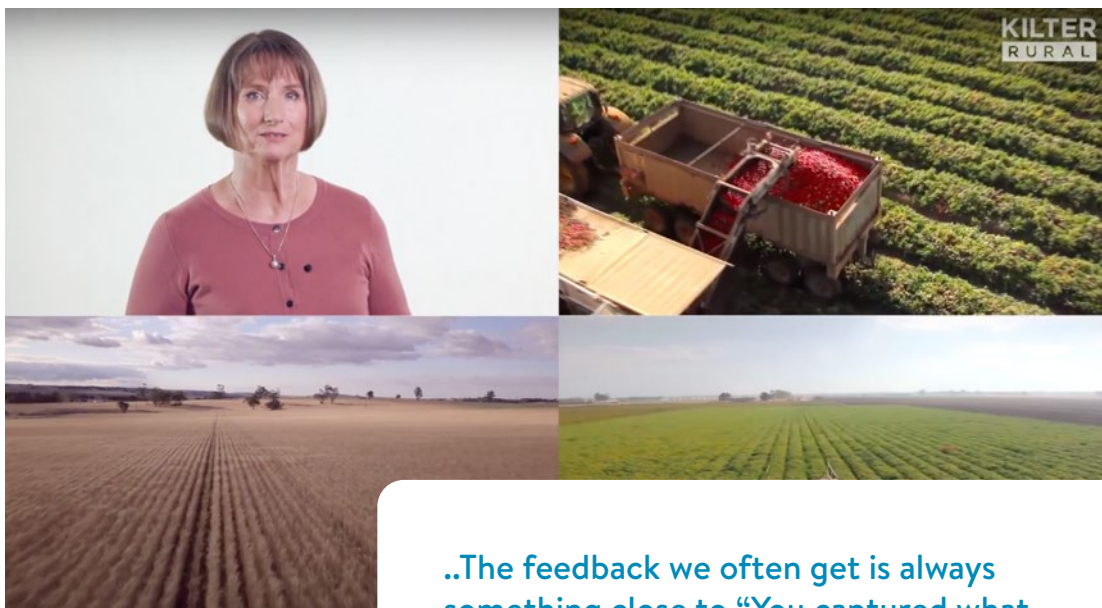
I will help you identify where you are in the value chain of investors, then pinpoint who is most relevant to you and what they are looking for. Then, together we will focus on the synergy between your offering and your targets investment mandates, to create an actionable strategy that helps you access their capital, and deliver the results they are seeking for their portfolio.

That is why Bravo Charlie exists: to help world-leading businesses and impact funds convey their story and document the deployment of their capital, so that more investors can see the benefit of their work.



When you engage with me, I'll:

- secure alignment from your senior executives around the 'why' that empowers your organisation.
- help your leaders articulate their stories in a concise, engaging way that informs and persuades while building trust that you'll deliver on your promises.
- show you how to use your story across your digital marketing, content creation and customer engagement processes.
- develop a video marketing strategy to meet your business goals, based on your available budget.



..The feedback we often get is always something close to “You captured what we’ve been trying to say for five years in ten minutes” – “Yes! That’s it exactly” – “We can do that? I’d never imagined!”



Expect us to generate ideas, turn them into strategic plans, then get them done alongside you.



Communicating your impact

There's a tremendous amount of work going into standardising the way we measure impact - and it's crucially important. But there's one thing that will make or break whether impact takes hold at the scale we need it to and create the kind of change the world needs, and that's how we communicate these outcomes.

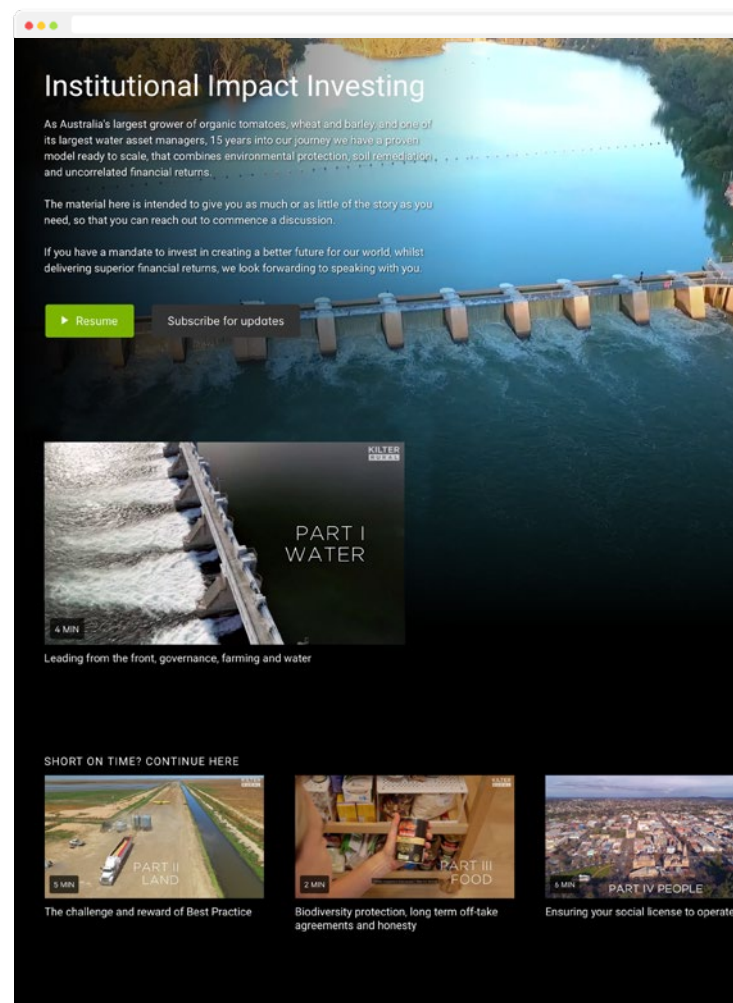
A 200-page document alone is not going to change investors' minds. What will, is a comprehensive communication strategy encompassing social media, sharp written tools, and two-minute videos that show the people who are directly being impacted resulting from the deployed capital and the kind of change it's making in society at scale, supported by the data.

To mature your communications, we will build a Stakeholder Engagement System that reflects your points of difference in the market, and enables you to progress your business strategy, justifying the funding you already have, and supporting further investment.

This happens by:

- Reviewing your existing marketing systems.
- Closing any gaps in the delivery of content and key messages.
- Helping you articulate your stories in shareable videos that target specific stakeholders.

If you are not showing the people that have given you money the impact you are creating, other than buried in a report, you are missing a huge opportunity.





Video Production

Video is an incredibly powerful medium. But let's be honest, there's a lot involved in video production, and you don't really want to do it yourself.

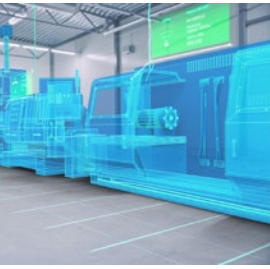


Video production is a craft that people have been refining since 1905, and it has its own specific, visual language. If you don't understand, speak or use that language, your audience will be very confused. Then you need to ensure you record clear audio (an art unto itself), and consider colour grading, lighting, and direction.

It also takes theatrical, public speaking and performance skills to coach people to show up and deliver their best selves on camera. They need to be comfortable enough to be able to talk and articulate their passion, which means video creators need to be a copywriter on the fly.

And it needs to be wrapped up together in mere moments when the right people are together in the right place.

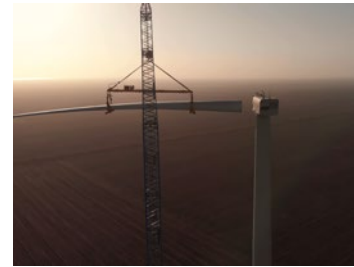
That's where my expertise in interview journalism enable me to ask contextual, insightful questions, that deliver more revealing answers from your team, clients, community leaders and suppliers.



It's hard to do, and that's why there are a lot of rubbish videos out there.

Instead, let the team and I:

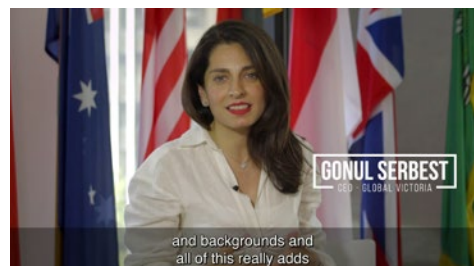
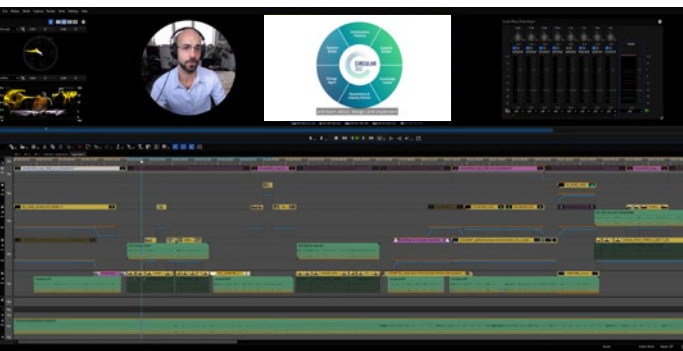
- Take care of the technical side of filming, editing and distribution.
- Coach you and your executives to share from the heart, and deliver engaging performances.
- Ensure you get broadcast-quality video, by using the best equipment, make-up and hair artists.
- Create both long and short pieces of video, to suit the attention and interests of your stakeholders.



The way to get the best results for you in the least amount of time is to take one or two days each quarter to film long and short pieces of video that captures your results, tells new stories about the impact you're creating, and highlights what's coming next.

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.. Whether you need support for a one-off project or you need us to turn up each quarter to create content to drive your strategy in the marketplace, you can expect enthusiasm, honesty and integrity to shine through in the digital presence we craft for you.





Capital Raising Partnerships

If you have a business that is making a difference through an innovative service or technology, have existing clients and a vision for changing the world, acquiring capital is the catalyst to scale your impact.

Whether you are at seed stage, or already thinking about investors, pitching, Series A or B capital, or maybe your IPO, but don't have the time or money to be constantly producing video content, creating a brand, and doing outreach activities, I can help.

I'll work with you through to the point of capital raise, sit next to you in the deal negotiation, and use my capabilities to help you articulate your story, get it in front of the right people, and close the deal. Then, when you succeed financially – so do I.

I am selective for this type of work. I choose partnerships with businesses on the basis that we have strong value alignment, can work together effectively, you can financially contribute to initial production costs, and the project you're doing is going to create significant, positive change in the world.

If that sounds exciting, let's talk.

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Philip has an infectious energy about him and it shows in his results. He has helped me through his canny ability to distill the essence of a business model and make constructive recommendations on future growth paths. He is also extremely well connected, particularly in the environmental business sector and has put me in touch with some very influential people. It's exciting to work with him and I recommend him highly.

Sean Dostal, Co-Chair, Victorian Corporate Partnerships



Ongoing Strategic Advisory

Having a sounding board who is not as close to the problem as you are can be extremely valuable - someone who'll give it to you straight and cut through the noise of your peers.

When the choices you're making impact hundreds if not thousands of people, finding a better way to do things means you can hit your goals faster.

In this way, I've worked with several leaders, providing my advice, counsel and coaching for fixed and ongoing periods to achieve great things.

In all cases, there was an exciting challenge and great value was created: together we've helped CEOs get on stage to deliver knockout presentations, restructured sales processes, increased cash flow, simplified proposals, and taken control of digital transformation projects that have hit a wall.

There are universal challenges and common problems in IT and marketing, and I'll help you move through yours faster than you can on your own.



Working with Ryan Babbage, CEO of Strategy Hubb





Conference speaking, panel hosting, board education and workshops

If you're looking for an inspiring, fun, thought-provoking keynote or panel host at your conference, from a specialist in unlocking the power of digital systems to engage stakeholders, get in touch.

I can also educate your board or run a workshop about the change that's possible when organisations rise to the challenge of effectively telling their story.

Presentations can be 15 minutes to 45 minutes, and workshops from 2 hours to a full day, helping people figure out the type of change they want to make, and actionable steps to get there.

These have been delivered for Australian Federal Government's Business Advisor Network, the CEO Institute, Small Business Victoria, various councils, and as a one-to-one session for many of my clients.

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Working with Philip has been a pleasure at many levels. He makes it easy for you to participate in something you might not find natural.

Often you arrive with quite complex stories. Philip has a great knack of making the complex simple for others. He is terrific at pulling together vision and pictures, to match your complex story and simplify it.

If you've got a pitch that's meaningful to you, and you need help with it, I would thoroughly recommend you speak to Philip.

Cullen Gunn, CEO, Kilter Rural





What Clients Say About Us

“..This has been brilliant, because I’ve been able to think about what really matters, not to me, but to my clients, and what you’ve been able to bring out in this process is real clarity about what matters and how to communicate that.

Also I’ve been seriously impressed by your absolute rigour in nailing down the message to the smallest number of words, your absolute persistence in getting to the value behind the sorts of things that I could talk about for hours and hours on end, and lastly, your ability to make me able to convey the energy, enthusiasm, passion, humour, and joy, as well as the intellect, depth, and the profundity of some of the things that I do.

So that’s brilliant.”

Andrew Hollo, Director & Principal Consultant, Workwell



“Philip is an enthusiastic, creative professional who can assess what a business needs very quickly and accurately.

His ability to develop a business strategy through extracting the company “story” is as effective as it is fun. Philip’s skill of asking the right open, leading questions not only helps to convey the business to your clients but also galvanises the business focus to the management team and staff.

Storytelling is a dying art. Philip instils a passion to tell a story and as a result, it gives a business a sense of purpose and your clients a passion to follow.”

Shane Dunstan, CEO, ARAN & Responsible Mining Solutions



“Philip Bateman was a lot of fun to work with, he is very organised and relaxed at the same time. He makes the people he films be at complete ease - and is very pragmatic with the suggestions he gives us for filming at the right budget with very high quality results. I would happily be willing to support Philip in his endeavours for the future.”

Katharine McLennan, Head of Global Leadership Academy, QBE

“The videos and digital marketing we created with Bravo Charlie have improved our sales and perception in our target markets. Philip was recommended by Enterprise Connect and started by consulting to us on our processes and what we were seeking, then directed and filmed our senior management and staff over 4 days.

He brought a team with him for the filming and we are very proud of the results. From this we made 18 videos and receive ongoing support - video works for our business”

Shanaka Unantenne, Managing Director, Dara Switchboards

“Philip is amazing at all aspects of communication and storytelling. His wide knowledge of the digital landscape and skills in collaborating with our team enabled Philip to deliver amazing work! Thanks Philip!”

Michael Dockery, CEO, Design Industries, Atlassian Enterprise Partners

“Philip and the team at Bravo Charlie were fantastic to work with. We were extremely happy with the results of the employee videos he filmed and edited for us and wouldn’t hesitate to recommend him to anyone needing corporate videos created.”

Lisa Rose, National Corporate Communications Manager at AIG Australia

“Philip jumped to it at very short notice to produce a suite of YouTube clips detailing our business processes and capturing the essence of Dawsons people, services and clients. He has provided excellent “post sales” service since, ensuring that we get the maximum impact from being multi media stars.”

Sharon Dawson, Director, Dawsons Group of Companies

“I cannot rate Bravo Charlie and Philip Bateman too highly. Given only limited notice and provided with scant notes, it took Philip only 2 weeks to develop a highly professional and polished corporate promotional video that captured the core of what our company is about. Thank you Philip !”

Peter R. Lewis AM, CEO, Hydrix



“Philip was recommended to us via Enterprise Connect. After initially flying to Sydney to meet with us, we went ahead with a week of filming - he captured our company culture and ethics, including visiting several clients who gave us great references on camera.”

Verity Thacker, Owner, Ranger Industrial

”I have known Philip Bateman from Bravo Charlie since 2011 when he was invited to create a professional mining video for Steinert Australia.

Our Sales and Marketing team, myself included, have felt quite inspired and impressed regarding the quality and potential for the Steinert video produced by Bravo Charlie. We initiated and have been shown by Philip the process for developing a total social media strategy.

This has been very well received by the company globally and we will continue to seek Philip’s expertise and advice in the future for Steinert’s social media and video production needs. We have no hesitation in recommending Philip to future business contacts or employers and we would be happy to provide further information on request.”

Simone Lawson, Marketing Manager, Steinert Australia

We came to Philip Bateman and his team with short notice, a tight time frame and broad requirements, then used the videos created to summarise and sell the future of our business unit in a national roadshow. Clients and internal stake holders loved it and the program is ongoing; I’d highly recommend Bravo Charlie if you want serious engagement and acceptance for your initiatives”

Greg Brereton, National Business Manager, Graincorp Oils

“As a business owner, I could not recommend Philip and his team more highly. Not only is Philip is a true master of his craft, he possesses the rare ability to teach his methods in a way that produces immediate results.

Literally, within 90 minutes of our first meeting, he’d helped me define a simple, useable, and effective process for maximizing strategic communications with our existing clients, and for reaching new clients through social media. His process made immediate sense and is light years beyond anything I’d been taught previously.

I intend to use Bravo Charlie and Philip on an ongoing basis - despite the fact we are located on different continents!”

Sam Rosenberg, CEO, INPAX



Ready to focus your
strategy, mature
your communications and
play a bigger game?



Let's talk.

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