

capitalise®

The Art of Impossible

Primer for peak performance

With some credit & capital thrown in!



PAUL SURTEES

CEO and Co-founder, Capitalise





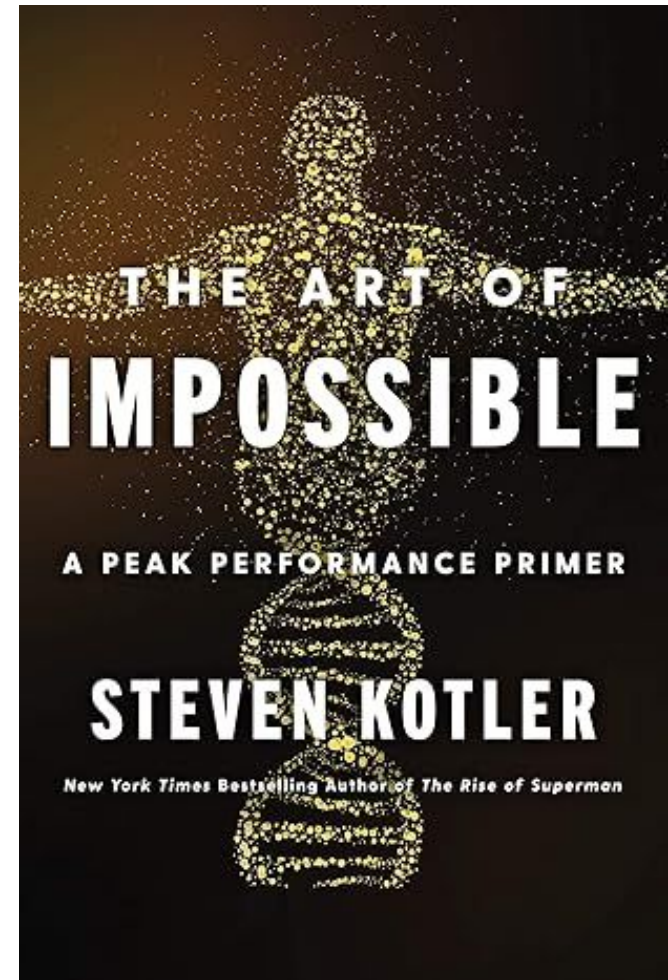
Personal peak performance

How to 10x your business

Unleashing Credit & Capital

Don't fight biology. Use it.

12,000 Iterations.



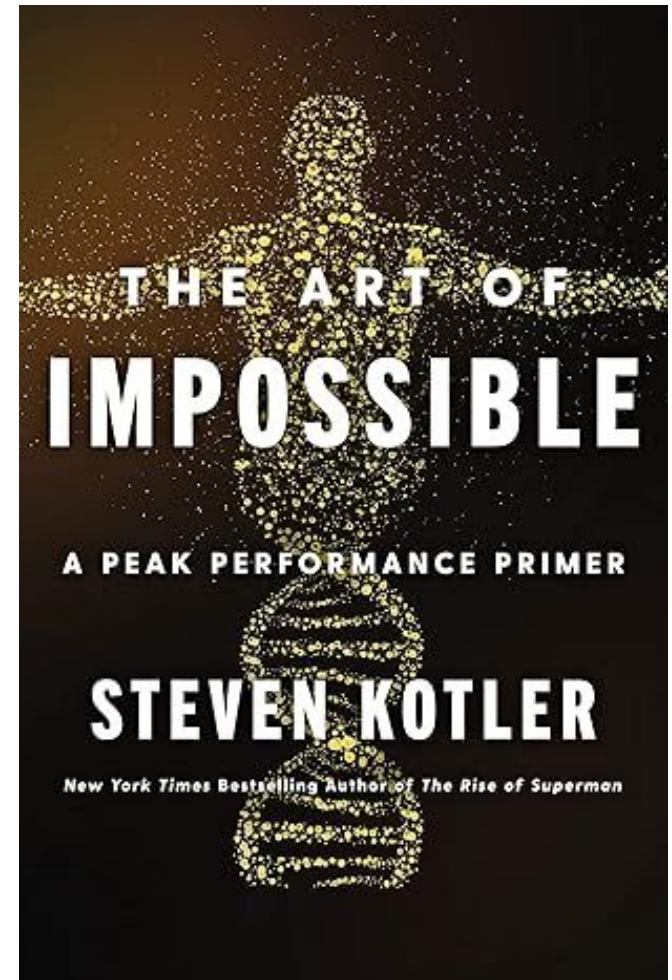
PEAK PERFORMANCE

MOTIVATION -> Ignites the journey

LEARNING -> Builds the necessary skills

FLOW -> Provides the fuel and the speed

GRIT -> Ensures you cross the finish line.



PEAK PERFORMANCE

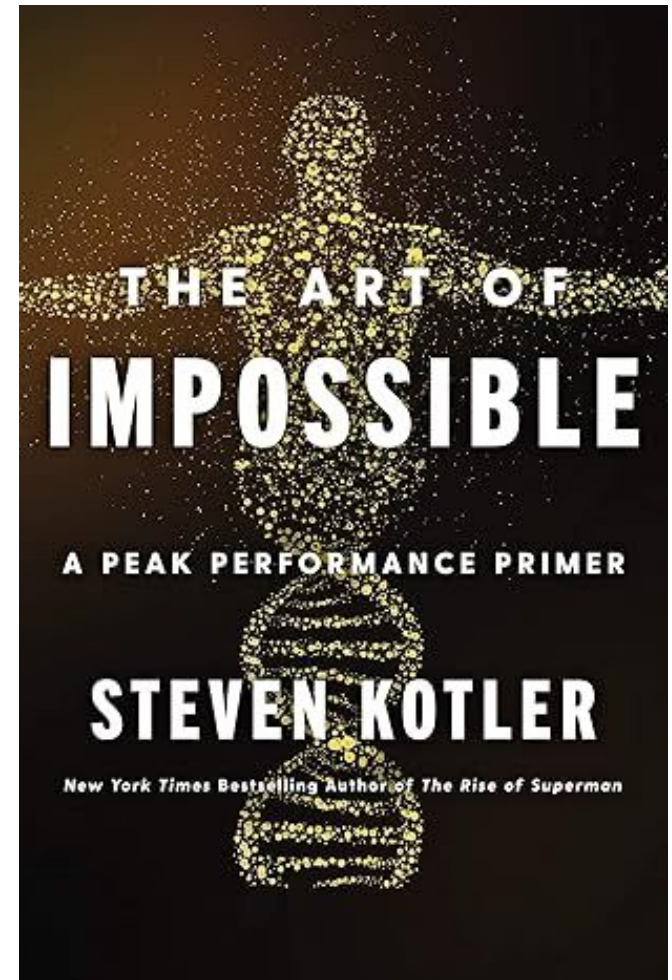
MOTIVATION -> Ignites the journey

Dopamine ...

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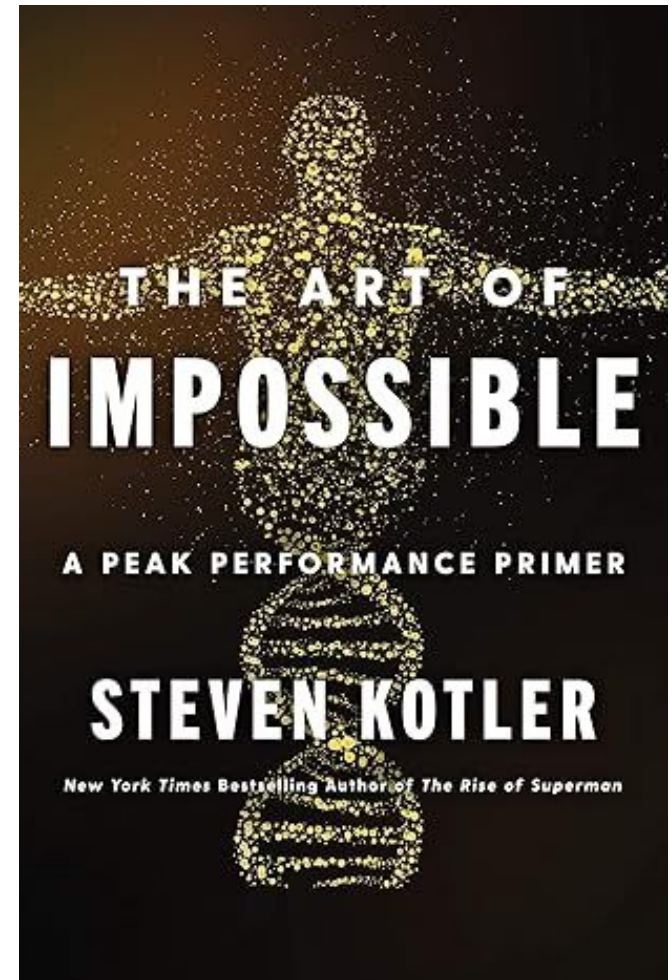
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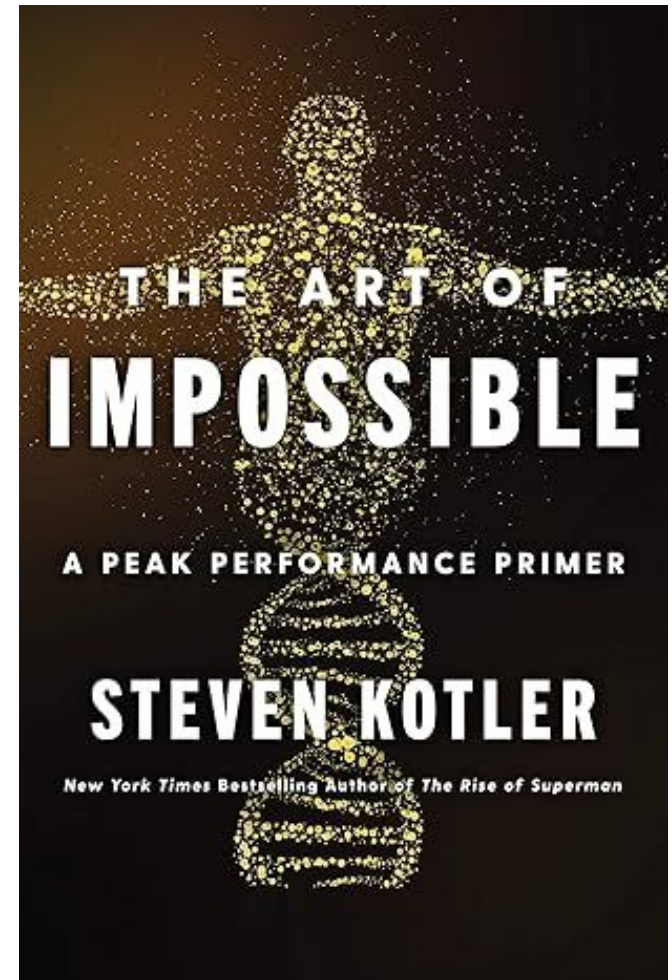
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Endorphins, Adrenalin, ...

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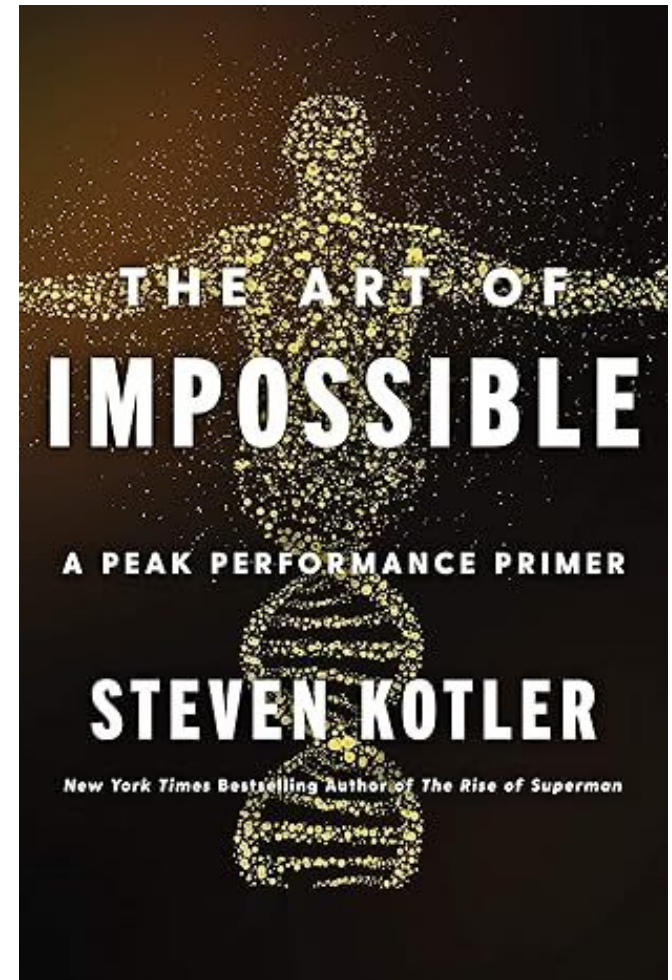
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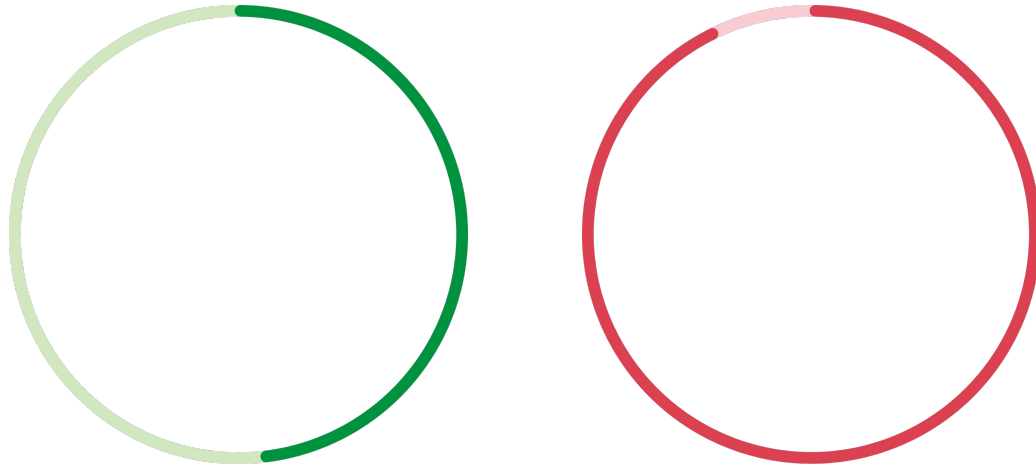
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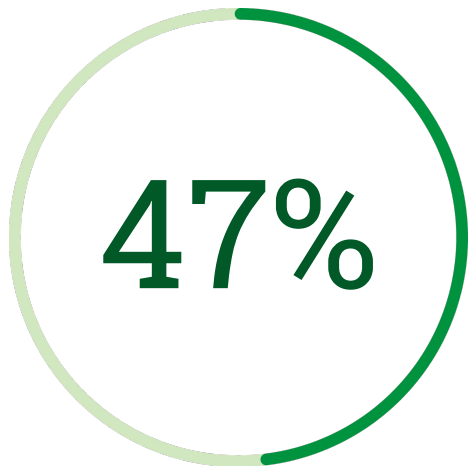
Cortisol response,



OPPORTUNITY & THREAT



[Recessions] bring movement



More "rising stars"
during the downturn than
during the stable period.

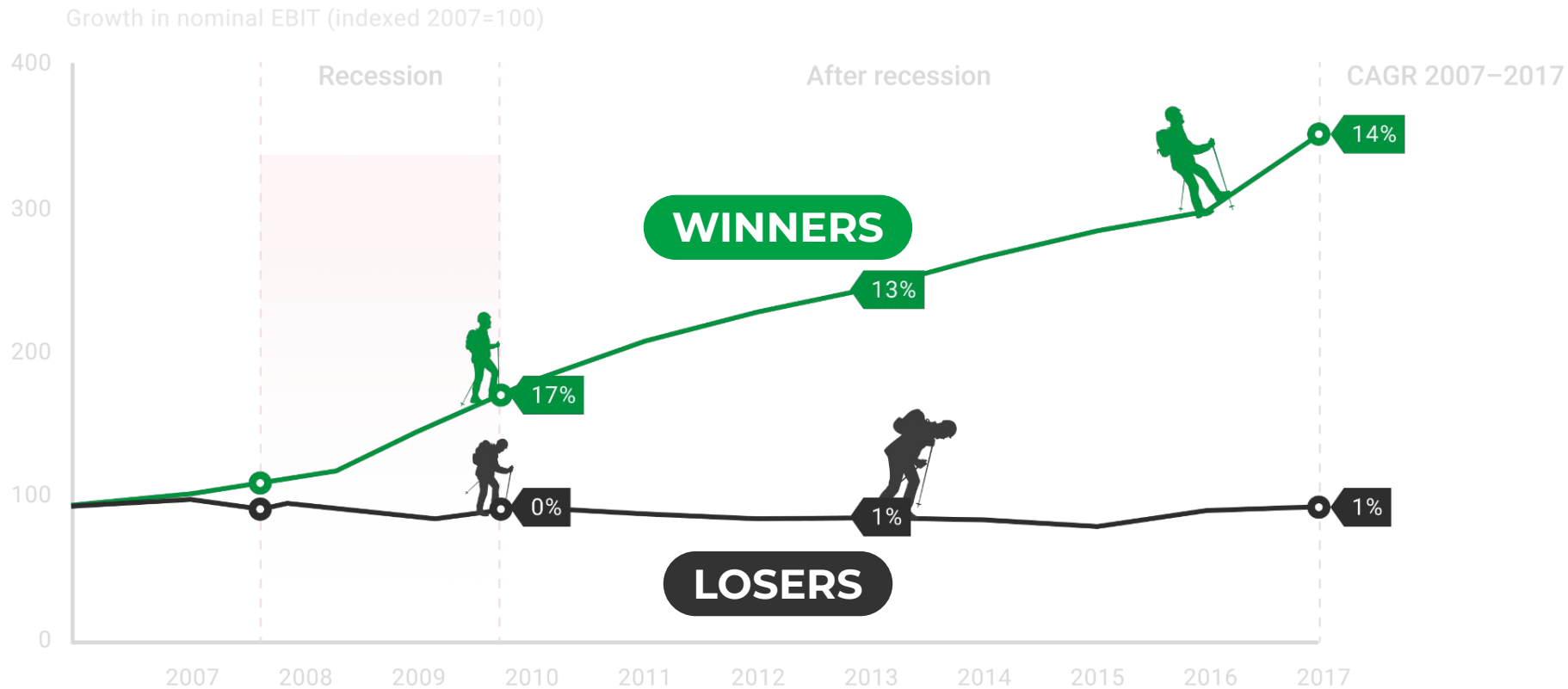


More "sinking ships"
during the downturn than
during the stable period.

LOSERS

WINNERS

REFLECTIONS FROM GLOBAL FINANCIAL CRISIS



✓ Balance sheet discipline

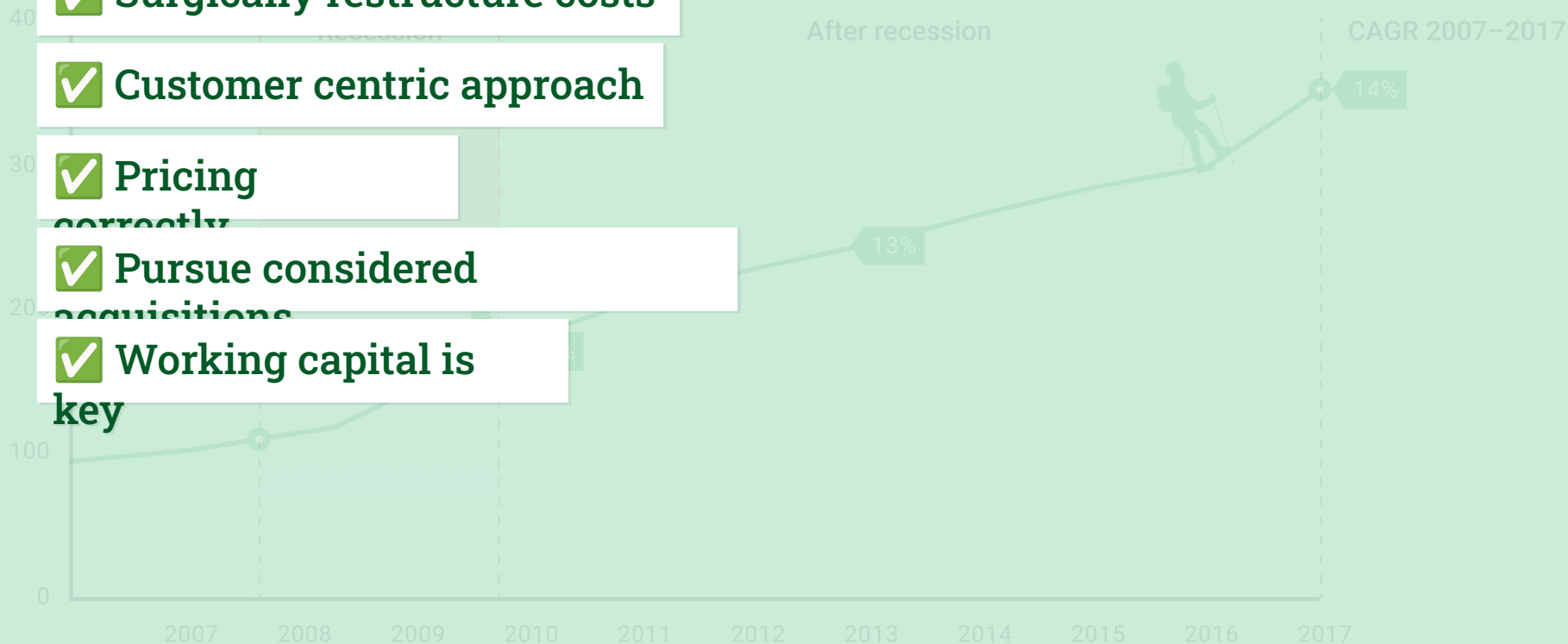
✓ Surgically restructure costs

✓ Customer centric approach

✓ Pricing

✓ Pursue considered

✓ Working capital is
key



✗ Cutting costs across the board

✗ Trying everything

✗ Cutting sales and marketing

✗ Trying new products

✗ Slashing R&D

✗ Trying new markets

✗ Letting go of valuable talent

✗ New products in new markets

✗ Ruling out acquisitions

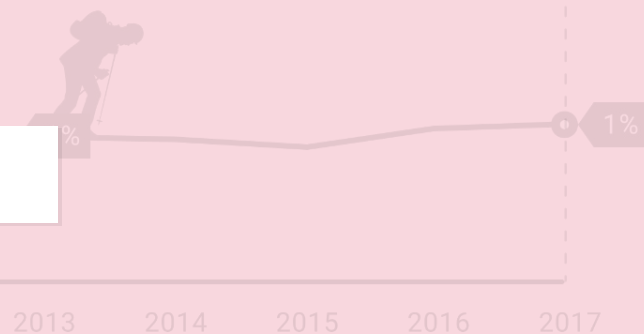
✗ Betting on everything

✗ Simply waiting too long

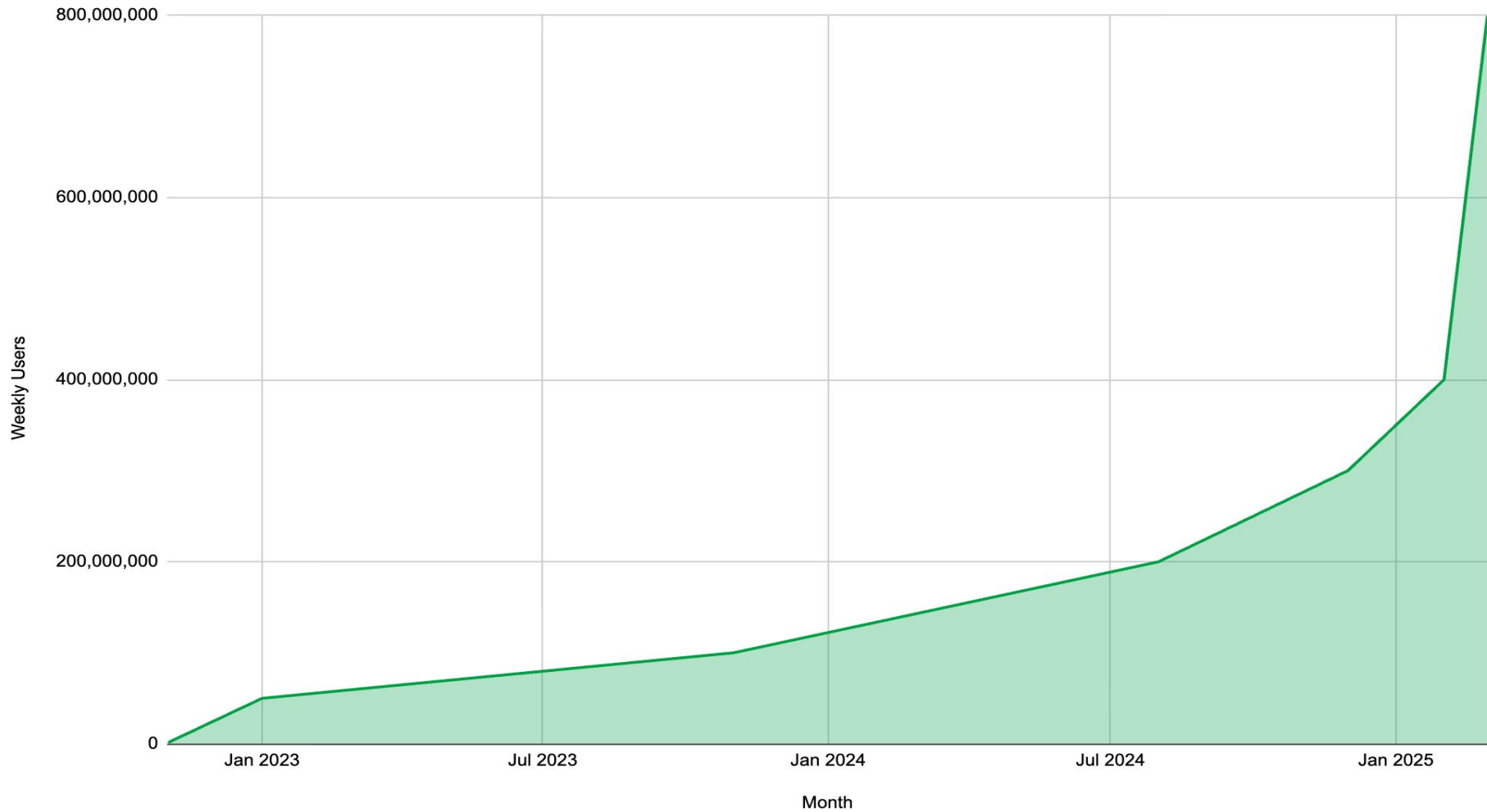
✗ Waiting to see what happens

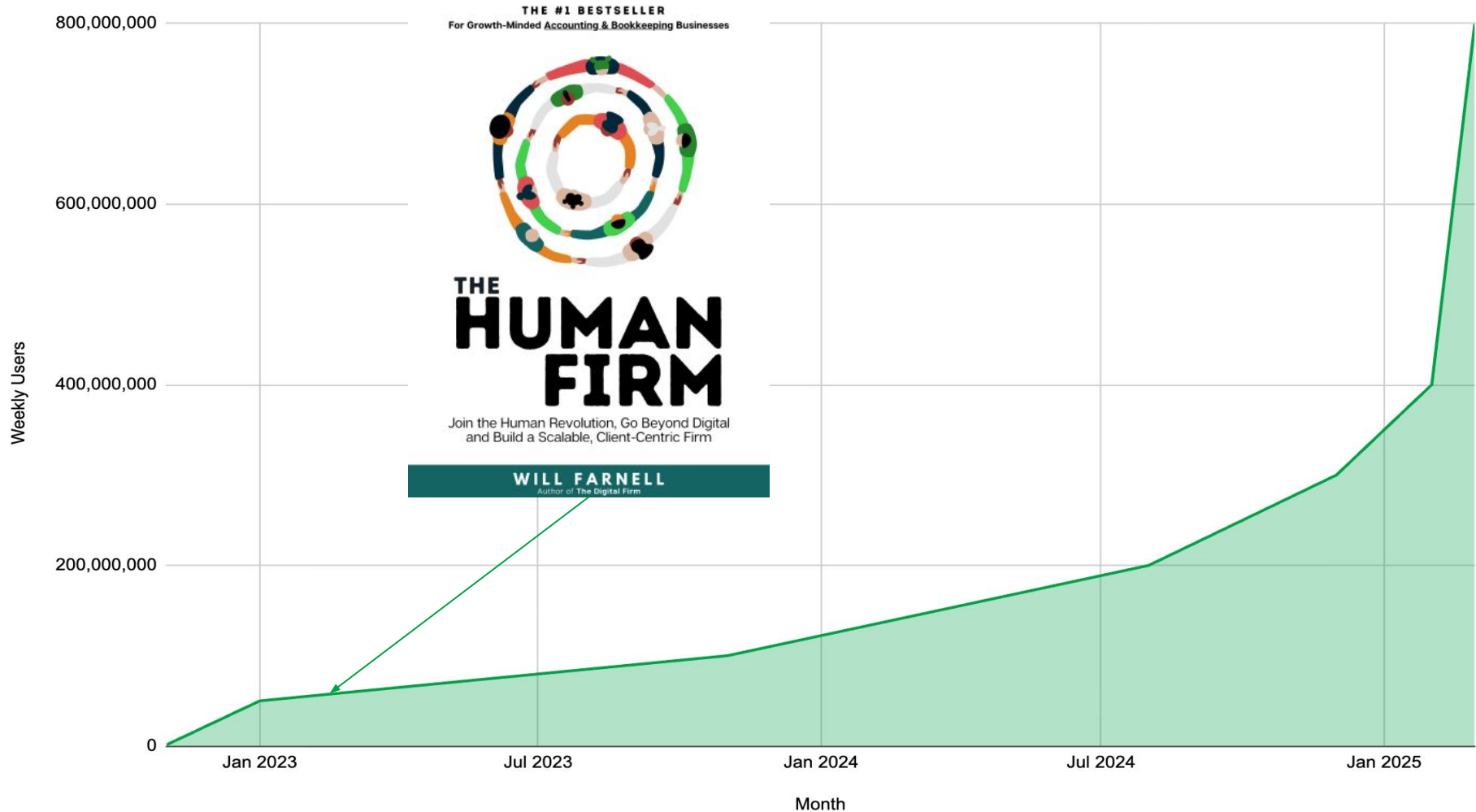
✗ A reactive approach

2007-2017











?

What would it take to grow 10x

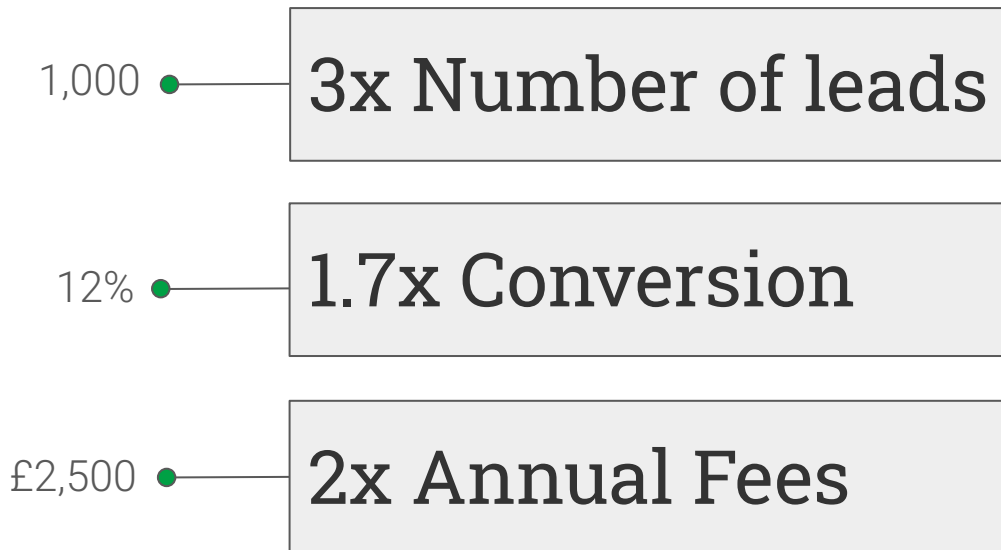
What would it take to grow 10x

3x Number of leads

1.7x Conversion

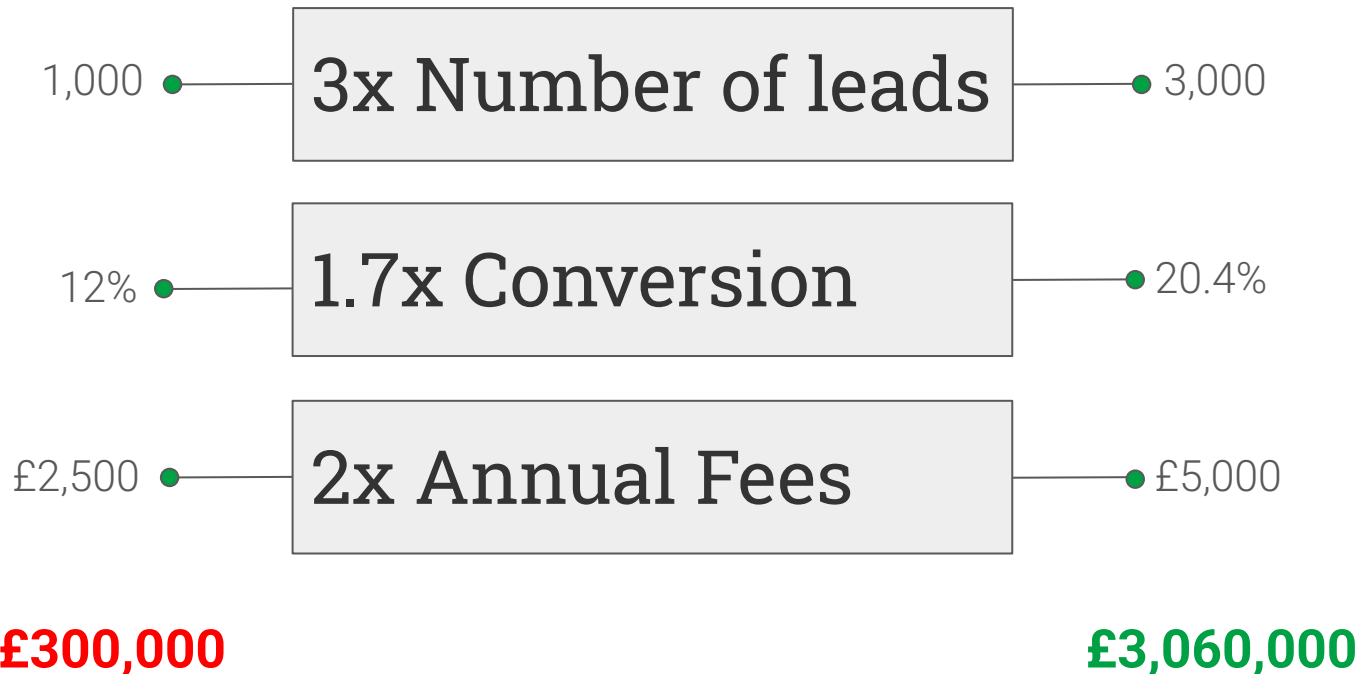
2x Annual Fees

What would it take to grow 10x



£300,000

What would it take to grow 10x



What would it take to grow 10x

1,000

3x Number of leads

3,000

12%

1.7x Conversion

20.4%

£2,500

2x Annual Fees

£5,000

£300,000**£3,060,000**



The Advisory Pyramid



WINNERS & LOSERS

WINNERS

LOSERS

WINNERS

WINNERS & LOSERS

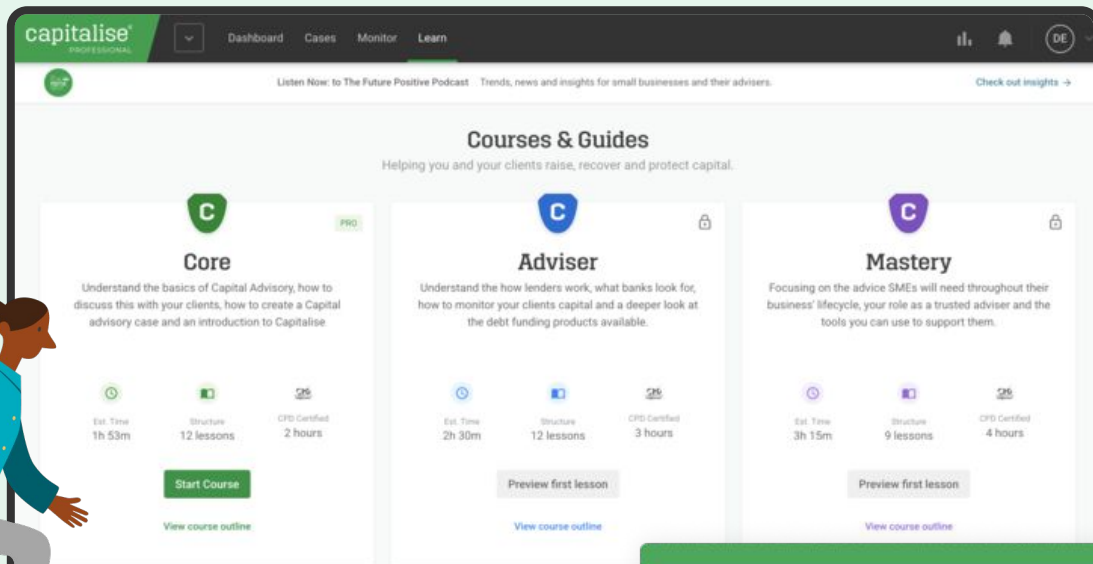
LOSERS

WINNERS



ACCOUNTING TOOLS

Learn platform





Monitor

capitalise

ENTERPRISE

DashboardCasesMonitorLearn

il.🔔JC

Monitor

Anytime3 months1 month7 days+ Add client

Portfolio56All clients

OpportunityHigh fixed asset registers available for optimisation+3 in last 30 days of 20 total clients

Emerging riskLate payments or bad debts accumulating+3 in last 30 days of 24 total clients

High riskCCJ or other legal notice registered+1 in last 30 days of 12 total clients

Client search

Showing 56 clientsCSVFinancialRisk profile

Company	Sector	Insights	Score	Revenue 3yrs	Net Profit	Revenue	Cash	Net Assets	Connection	Transaction data
Grand Designs UK + TagEmailed	Finance 5 years	12	A£120k Limit	2018 – 2020	£5,787	£3,000 12% ↓	£3,697	£100,485	Xero1 day ago	Disolved
UK Finance House Partners + Tag	Finance 12 years	9	C£45k Limit	2019 – 2020	£3,890	£2,568 7% ↑	£12,269	£46,798	QuickBooks3 hrs ago	
Farmhouse Food Group + TagFunding search	Agriculture 2 years	9	E N/A Limit	2018 – 2020	-£490	£2,568 17% ↓	£678	£890	Connect Acc. data	30 - 90 days old
Drone Tech + Tag	Tech 7 years	8	B£120k Limit	2018 – 2020	£12,356	£4,555 10% ↑	£22,568	£120,777	Xero2 days ago	30 - 90 days old
Computers Alliance + TagTo assign	Finance 5 years	8	A£120k Limit	2018 – 2020	£5,787	£3,000 12% ↓	£3,697	£100,485	Sage2 days ago	< 30 days old

Search company 🔍

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×

Acme Limited

Professional Services • 7 years old • Y/E 31 Dec

Connection



QuickBooks
2 days ago

Account Manager



Jack Johnson
FKY Accountants

Last transaction date: 3 days ago

Business performance

An overview of the financial performance.

Prior period

YTD

Revenue
To 31 Dec 2024

£82,500

↑ 358% from 2023 (£18,000)

Profit before tax
To 31 Dec 2024

£82,500

↑ 358% from 2023 (£18,000)

Gross profit %
To 31 Dec 2024

100%

from 2023 (100%)

Net profit %
To 31 Dec 2024

100%

from 2019 (100%)

Credit information

Looking good

Keep your credit score in check to optimise lender and supplier terms.



Credit score
81 - 90

Low Risk

Credit limit
Max. recommended credit

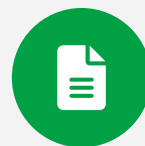
£7,100

↓ 318% from May 2025 (£1,700)

Company searches
In the last 12 months

60

27 enquiries in last 3 months



ACCOUNTING TOOLS

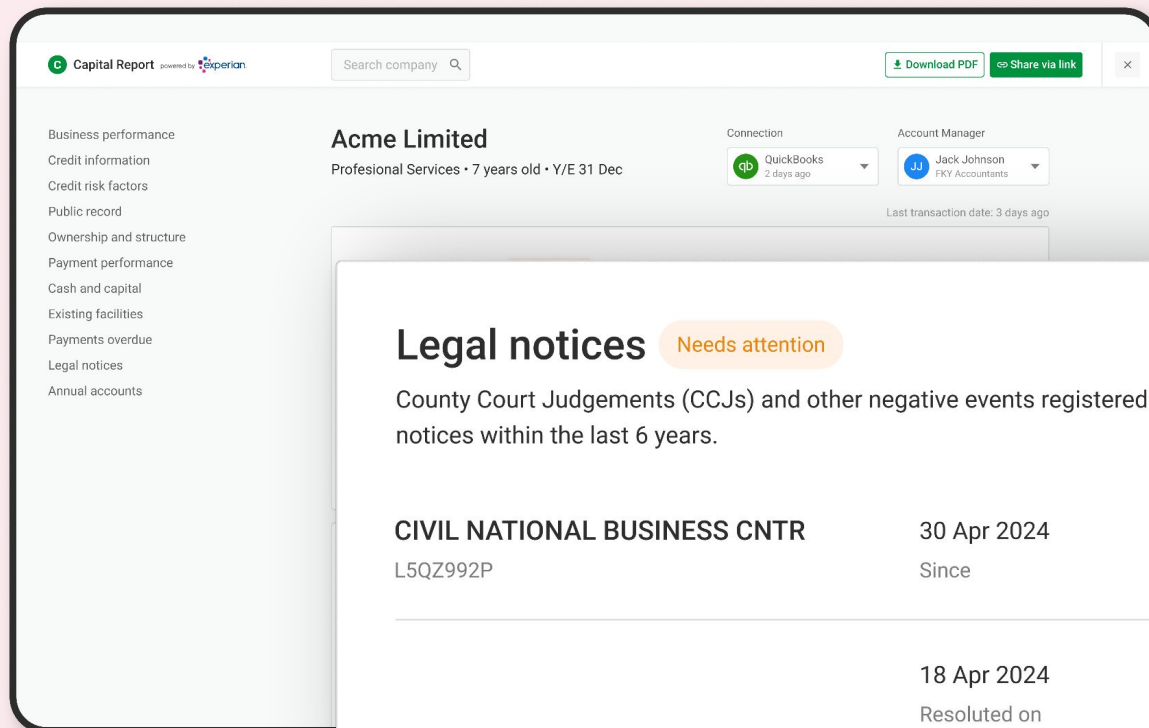
Capital report

C



ACCOUNTING TOOLS

Legal notices



Legal notices

Needs attention

County Court Judgements (CCJs) and other negative events registered against the company in gazettes or legal notices within the last 6 years.

CIVIL NATIONAL BUSINESS CNTR

L5QZ992P

30 Apr 2024

Since

Satisfied

£7,560

Original value

18 Apr 2024

Resolved on

Resolution to wind up





capitalise

Could your company
credit score be improved?



Continue →



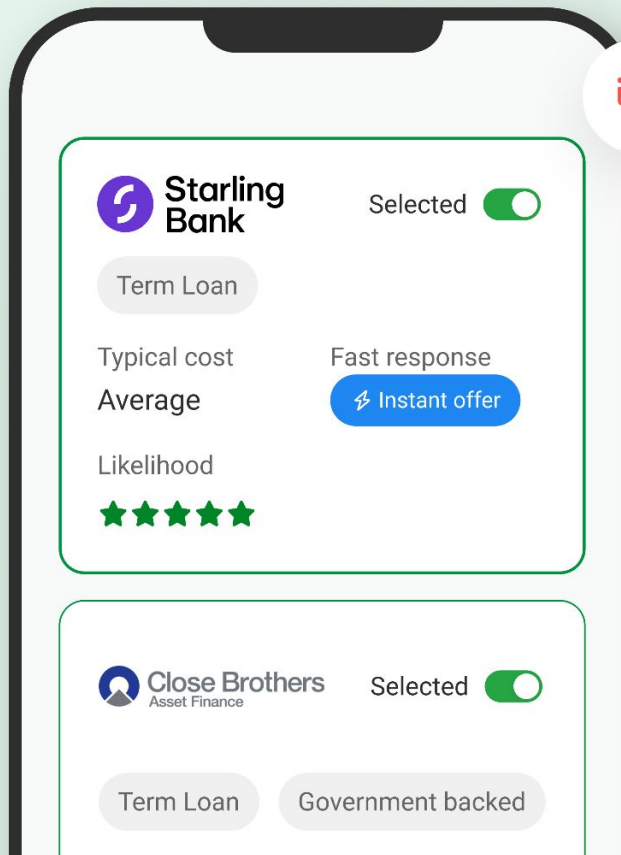
96% of credit review cases
result in a positive credit
score change.

EXPERIAN



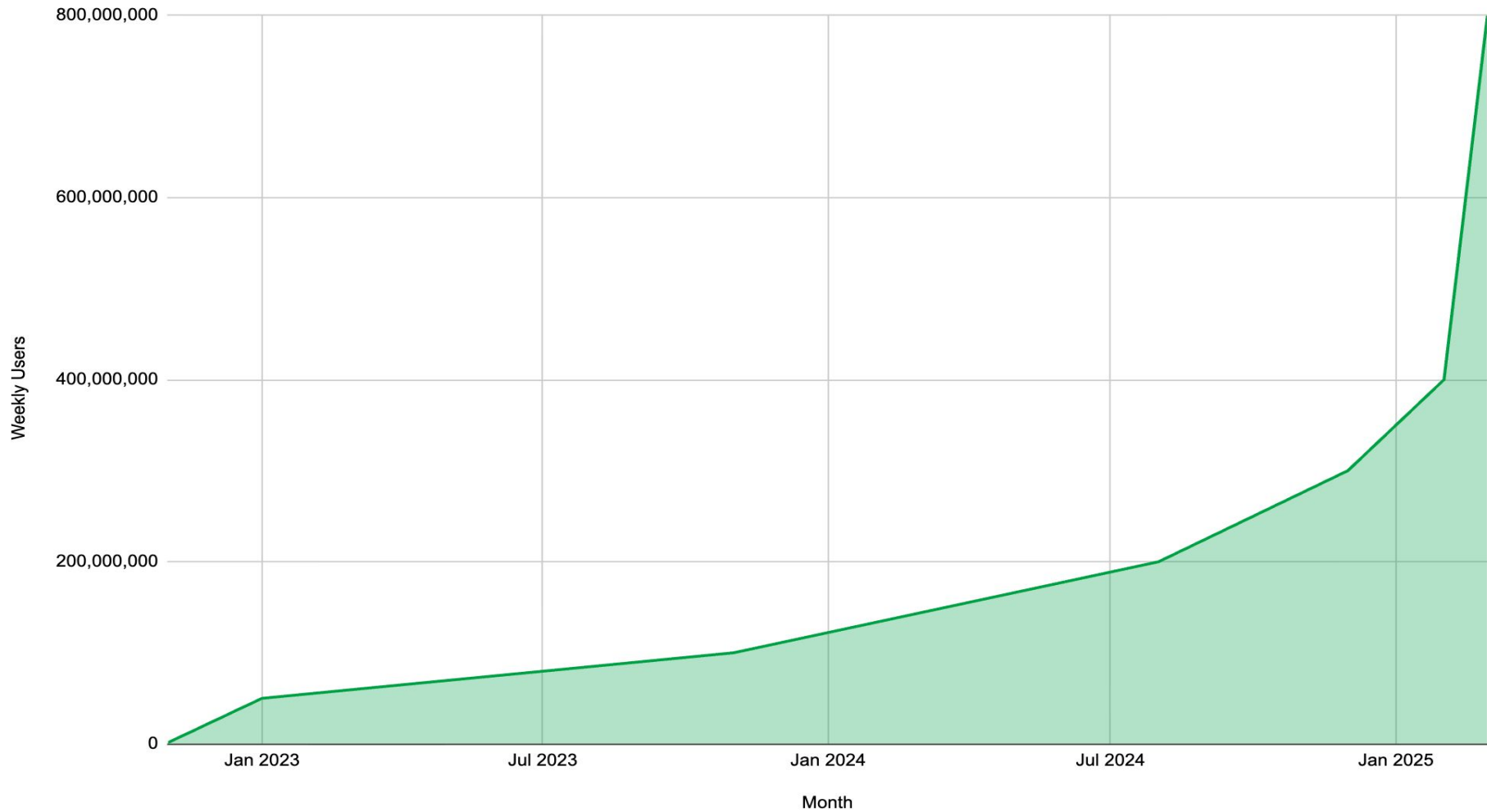
MARKET COMPARISON

Funding



“6-figure-club”





How are YOU going to double your fees?

