



Your Sellability Score

The first month of each year is dedicated to getting or updating your Sellability Score and measuring your progress on the eight key drivers of Sellability. This will allow you to benchmark your progress each year and understand the value of your business along with the areas you need to reinforce in order to increase your valuation.

Your Financial Performance

In the second month of each year, we review your personal and professional long-term financial goals using a tool we call The Objectives Waterfall. We start by looking at your most important five-year goals and then pinpoint the annual objectives that will be necessary to keep you on track.

Your Customer Score

The third month of each year is dedicated to benchmarking your customer's satisfaction with your business against the most successful and fastest growing companies in the world. We will deploy a confidential survey to your customers called The Net Promoter Score, which has been statistically proven to predict your company's growth rate because it predicts your customers' likelihood to re-purchase and to refer you. This questionnaire comes on your behalf from an independent research company so it will be anonymous and not linked to the Value Builder. Getting your Net Promoter Score will allow you to see how satisfied your customers are and determine what steps you need to take in order to improve their overall likelihood of recommending you to others. Finally, you'll be able to see how your company measures up against other companies in your industry and also world class businesses like Google and Amazon.

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Month 1

Month 2

Month 3

Month 4

Month 5

Month 6

Your Growth Potential

In the fourth month of every year we will review your product and service mix to maximize your growth potential. The first exercise is designed to pinpoint your product and service lines with the highest potential to grow and the least risk associated with investing in them. The second exercise is called The Scalability Finder, in which we identify your products and services that have the potential to scale up the fastest. This session will give you a road map of the products and services you can offer that will help you grow your company.

Your Monopoly Control

In month six and then annually thereafter, we will review your company's positioning in the market using a tool called The Positioning Planner. This tool allows you to isolate the attributes and qualities of your business that give you a defensible market position. This exercise will illustrate which marketing messages give you the highest degree of differentiation from your competitors and are also most meaningful to customers. This exercise is repeated every 12 months as your company develops, the market evolves, and competitive threats emerge.

Your Recurring Revenue Builder

In month five and then annually thereafter, we'll focus on increasing both the number and quality of recurring revenue streams flowing into your business. You will complete The Automatic Customer Builder tool, which identifies opportunities for annuity revenue in your business. Recurring revenue increases the value of your business, smooths out demand so as to allow you to plan your business more efficiently, and improves both cash flow and profitability.

Your Short List

In month eleven and then annually thereafter, we will develop and fine tune a short list of potential acquirers with a *strategic reason* and also the *resources* to buy your company. Whether you want to sell your business in a year or a decade, knowing who the natural buyers are for your business will allow you to cultivate a relationship with those organizations so you're on their radar, which encourages them to make the first move when the time comes and puts you in a position of negotiating strength. Developing a short list also allows you to look at business decisions through the lens of how they will add or take away from your attractiveness in the eyes of a strategic acquirer. At the core of this session is The Short List Builder tool which will help you to develop a long list of acquirers and then apply the 5-20 Rule to isolate those companies with both a strategic reason and the resources to buy your company.

Your Valuation Teeter Totter

In the tenth month and then annually thereafter, our focus will be on cash flow. Our goal will be to maximize the cash flow coming from the day-to-day operations of your business. This session is anchored by The Cash Finder tool. After this session, you'll have a set of actions to take that will increase your cash flow, minimize or eliminate stressful periods of low cash flow, and increase the overall value of your company.

Your Customer Score

The ninth month of each year is dedicated to the continued benchmarking of your customer's satisfaction with your business against the most successful and fastest growing companies in the world. Following up on the survey deployed in the third month of the year, this update allows you to continue to track your progress.

Your Switzerland Structure

In month eight and then annually thereafter, our focus will be on reducing your reliance on any one customer or on any one employee. This session involves working through two exercises: The Employee Stack Ranking and The Customer Concentration Matrix. As a result of completing this session, you will have an action plan for reducing over-reliance on key employees and/or customers. This has the effect of decreasing risk within your business and increasing your company's value.

Your Envelope Test

In month twelve and then annually thereafter, the Envelope Test will help you articulate your goals for your business and your life. How would your life be different if you sold your business? What are you aiming toward? These are the types of questions you'll contemplate when completing The Envelope Test.

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Your Hub & Spoke Score

In month seven and then annually thereafter, we will dedicate our time to minimizing your company's dependence on you personally. At the core of this session is a review of the results of a survey of your employees, asking them how informed they are about your company's priorities and goals. The most valuable companies can operate without their owner's everyday involvement, and this session will identify areas where additional training, systems or processes are needed to allow your company to operate without you.

