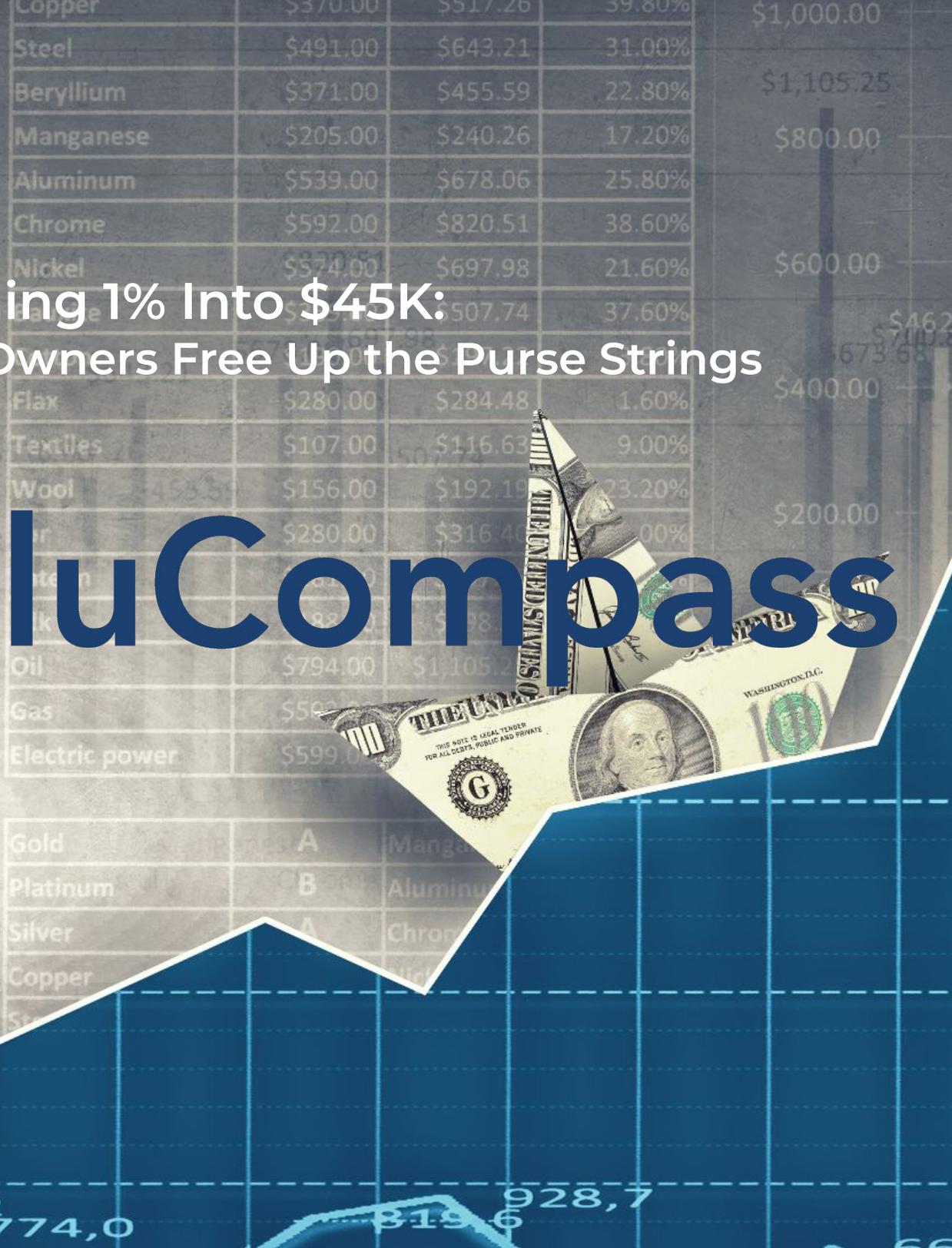


**Turning 1% Into \$45K:**  
**Helping Business Owners Free Up the Purse Strings**



# ValuCompass

- **Qualify Prospective Business Owner Clients Faster**
- **Easily Get Business Owners to Agree on a Budget to Work With You**
- **Uncover More Revenue for Your Own Business**





## “What’s the cost? What’s the plan going forward?”

One of the biggest objections advisors and consultants have to overcome with prospective business owner clients is the “money question”.

**How do you showcase the value of your services and translate that into real dollars?**

What if you had an way to immediately present a plan and a “budget” for the coming year with prospective clients that was:

- Easy to communicate and understand?
- Readily accepted by business owners?
- Able to uncover more revenue than most advisors or consultants dare ask for their services?

The ValuCompass Discover Assessment delivers all three during your first meeting with a new prospect, but first...

### **You Must Understand How to Frame the Conversation**

Most business owners will own assets in various asset classes, such as fixed-income securities, stocks and equities or funds. For many of these they will pay an approximate 1% management fee.

But they will almost always state that their business is their biggest asset, and they count on it for current and future income, including retirement.

Yet, almost certainly no one has helped them see their biggest asset as another asset class that needs attention, nurturing and outside management like their liquid assets require, and for which they willingly pay 1% of total value.



**Ask:**

**“If you would pay 1% of the value of your investments to have those managed, then why wouldn't you do the same for your largest asset--your business?”**

By asking that simple question, most business owners have a “light-bulb-on” moment: “Yes, why wouldn’t I?”

- One percent of enterprise value does not sound daunting. Business owners deal with budgets day in and day out. They get the concept immediately, especially when put into the context of their other assets they own.
- This establishes a “budget” for all of the planning and/or product placement for the coming year.
- The budget also pays for and sets parameters around you and experts you’d call in to work on initiatives within the business that would continue to raise its value.
- It eliminates the feeling many business owners get when they are nickel-and-dimed for multiple invoices going forward. They are comfortable knowing that all things are paid for out of their 1% budget.

**A Good Example:**

The average enterprise value of businesses within the ValuCompass system is \$4.5M. That translates to a \$45,000 “budget”.

Within your first meeting and in just a few minutes, your prospect's objections and questions are answered:

**What's the cost? What's the plan going forward?**

**ROI.**

## Tying the Budget to a Plan - Quickly

Our Discover Assessment is the door-opener that catches the business owner's attention. Asking only about 25 questions and taking just a few minutes to complete, you and the client will find out:

1. The enterprise value - and therefore your 1% budget.
2. The potential value of the business if it operated within best practices for the 18 "Drivers" we assess. This is an "OMG" moment for business owners.
3. The top 3 strangleholds which are handicapping the business value - which becomes your actionable plan going forward.

Most business owners know something is "off" within their business, but they don't know "where". You've just handed them what they've wanted to know but couldn't figure out, and therefore given them a plan and a budget they understand.

There is no stronger engagement-closing formula.

With this one tenant that ValuCompass brings to your table, you can:

- Qualify Prospective Business Owner Clients Faster
- Easily Get Business Owners to Agree on a Larger Budget to Work With You
- Begin To Develop An Actionable Plan For The Coming Year With Any Client
- Free Up Business Owner Purse Strings And Turn 1% Into, On Average, Into A \$45,000 Advantage For Your Business. And, of course, the bigger the enterprise value the bigger your budget.

We have other ideas, concepts and tools that help you chart your course for success with business owner clients and keep them for a very long time.

If you'd like to explore more from ValuCompass, simply arrange for a conversation with one of our team members. [Get on our calendar by clicking here.](#)

Our Promise:

No strong sales pitches - just a friendly conversation.

[Sign up now for a convenient time on our calendar!](#)

