

// TRANSFERABILITY DIAGNOSTIC

Owner Dependency Audit

20 questions. 5 categories. Score honestly before a buyer does.

Check each box where you can honestly answer YES. Every unchecked box is a risk buyers will find and price in. Score: 16–20 = Low. 11–15 = Moderate. Below 11 = High dependency.

Customer Relationships

SCORE: ____ / 4

- 01 ☐ Less than 20% of customers primarily interact with me personally
- 02 ☐ No top-10 customer would likely leave if I exited the business
- 03 ☐ All customer contracts are with the business entity, not me personally
- 04 ☐ Our sales pipeline does not depend primarily on my personal network

Decision-Making Authority

SCORE: ____ / 4

- 05 ☐ My team makes routine pricing, operational, and hiring decisions without me
- 06 ☐ I have NOT been the final decision-maker on most day-to-day choices this month
- 07 ☐ We have a documented decision-making framework or authority matrix in place
- 08 ☐ I went on a 2-week vacation in the past 12 months without significant disruption

Institutional Knowledge

SCORE: ____ / 4

- 09 ☐ Core product/service delivery is documented in written SOPs
- 10 ☐ Team handles top 10 most common client situations without escalating to me
- 11 ☐ We have a CRM with detailed notes on all client interactions and history
- 12 ☐ A new hire could reach performance in 6 months using our documentation alone

Team Depth & Succession

SCORE: ____ / 4

- 13

☐

At least one senior employee can manage the business for 30 days without me
- 14

☐

We have succession plans for our top 3 most critical roles
- 15

☐

Key employees are compensated competitively enough to stay through a transaction
- 16

☐

We have cross-trained employees to eliminate single points of failure

Financial & Operational Control

SCORE: ____ / 4

- 17

☐

Financial reporting operates without my direct involvement
- 18

☐

All financial systems (accounting, billing, payroll) are managed by others
- 19

☐

We have a CFO, controller, or senior finance person who owns the monthly close
- 20

☐

I can produce a monthly management report without pulling the data myself

Total Score

_____ / 20

16–20	Low Dependency	Exit-ready. Buyers see a transferable business. Continue building the team.
11–15	Moderate	6–12 months of targeted improvement will meaningfully expand your multiple.
Below 11	High Dependency	Do not go to market. 12–18 month restructuring plan required.

BRiNQ Ventures helps owners reduce dependency and build exit-ready businesses.
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