

Your Value Builder Assessment

The **first month** of each year is dedicated to getting or updating your Value Builder Score and measuring your progress on the **eight key drivers of Value**. 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 to increase your company valuation.

Your Scalability Finder

In the **second month** of each year, you will complete **The Scalability Finder exercise** in which you will identify your products and services that have the potential to scale up the fastest. This session will give you a roadmap of the products and services you can offer that will help you grow your company while minimising its dependence on you personally.

The 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. You will **deploy a survey** designed to gather input from your customers. All surveys use a standard set of questions that have been proven to be predictive of a company's growth rate. You can also add your own custom questions to the survey.

Your Growth Potential

In the **fourth month** of each year, you will review your product and service mix to maximise your growth potential. **The Growth Quad 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. This session will give you a roadmap of the products and services you can offer that will help you grow your company with the least risk.

The Automatic Customer Builder

In **month five** and then annually thereafter, you'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.



The Monopoly Control

In **month six** and then annually thereafter, you 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 Short List Builder

In **month eleven** and then annually thereafter, you 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.

The Valuation Teeter Totter / See Saw

In the **tenth month** and then annually thereafter, your focus will be on cash flow. The goal will be to maximise 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, minimise or eliminate stressful periods of low cash flow, and increase the overall value of your company.

The Customer Score

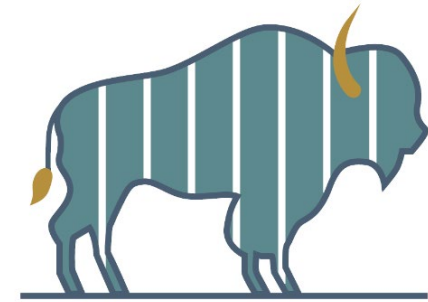
The **ninth month** of each year is dedicated to the **continued benchmarking** of your customer's satisfaction with your business against the most successful and fastest growing companies in the world. Following up on the survey deployed in the third month of the year, this update allows you to continue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

The Switzerland Structure

In **month eight** and then annually thereafter, your 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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The Hub & Spoke Score

In **month seven** and then annually thereafter, you will dedicate your time to minimising 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.

