

VALUE BUILDER STORY:

The Value Builder System™ Provides a Big Picture View of the Company That Business Owners Need to See

BACKGROUND

Bob Green is the owner of TAB (The Alternative Board) North Shore. TAB is modeled after a board of directors that public companies typically have, but is catered to private businesses. TAB gathers non-competing business owners in a confidential setting where they can talk about life and business and get advice from other professionals. Green is hyper-focused on bringing together like-minded individuals he calls “freedom fighters”; business owners who are able to harmoniously balance life and business.

BUSINESS CHALLENGES

With a growing market of wealth When putting together group advisory meetings, Green’s goal was to create the most comfortable and productive environment possible. In order to do this, he began asking business owners for feedback on what their experience was like in past group sessions. Green recognized two common answers on why group coaching sessions were not effective. Firstly many business owners said they didn’t get much out of it, and “were just a number”, which led them to lose interest. The other common response was that many business owners felt intimidated in this setting. Many individuals were not confident enough to hold their own in these conversations.

These two concerns led Green on a search for a platform that could help address these issues as well as provide effective coaching for business owners. Green needed a tool that was hands-on and engaging, allowing business owners to feel like active contributors within group meetings. Secondly, Green needed a platform that allowed all business owners to work within the same framework which creates consistency and alignment with all of them working towards growing their business..



ADVISOR: BOB GREEN

Type of Advisor:
Business Coaching

Number of Years Established: 20+

RESULTS



Green was able to find immediate results for his clients after implementing The Value Builder System™ into his practice.



With The Value Builder System™ now part of their process, Tab North Shore has found the perfect complement to their offering.

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

In a few short months after investing in Why The Value Builder System™, Green has been able to integrate its use into his practice and quickly landed six new engagements. In leveraging specific features of the platform, TAB North Shore has seen improvement in a wide variety of areas as well.

Green first leverages The Value Builder Questionnaire, a 15 minute online assessment that provides a report on the strengths and weaknesses of the business. Upon completion, business owners are provided a quantifiable score on how their business performs based on the 8 Key Drivers of Company Value. When describing the impact of this tool Green said, ***“it provides a big picture view of the company that business owners need to see.”*** In assessing the results, Green and the business owner are able to objectively look at how the business is performing, and begin discussions on how to tackle areas of improvement. Green uses The Value Builder Questionnaire primarily as a tool for closing new deals after a successful discovery call. For every ten conversations, Green is able to close one new deal and uses the assessment as the first step in helping owners grow their business.

For businesses looking to sell, The Value Builder Questionnaire has also proven to be extremely helpful. Green mentions, ***“it allows you to look at the business through the eyes of the acquirer so that we can do all the right things to position the company as an attractive target.”*** This tool helps to put business owners in the proper mindset to sell, focus on building value and successfully exit.

Green has also integrated The Value Builder System™ into his overall advisory process. Green notes, ***“I use The Value Builder System™ as a process of individual one-on-one coaching as I am determining if a person is a good fit for an existing group, or if I should make a new group that will be a better fit.”*** As a believer that the right mix of individuals is necessary for success, Green uses The Value Builder System™ to better understand where to place each owner to ensure they thrive.

Green has also used the PREScore™ (Personal Readiness to Exit Score) to determine what type of coaching works best for each owner. The PREScore is an assessment taken by business owners to determine how ready they are to exit their business on a personal level. Based on their score, Green has a better understanding of their preparedness to exit and is able to determine the next steps - one-on-one coaching or entering them in a TAB group.

With The Value Builder System™ Green is now spending less time with clients, while continuing to charge the same fee. Within TAB meetings, Green said, ***“I am able to scale back and let the group dynamic take over. I become a facilitator and curator of the meeting. You get great collaboration and everyone speaks the same language.”*** With all his clients working within the framework of The Value Builder System™, Green is able to take a backseat and steer conversations, rather than being fully immersed.

RESULTS

With The Value Builder System™ now part of their process, Tab North Shore has found the perfect complement to their offering. Through The Value Builder Questionnaire and PREScore™ assessment, Green is able to gather a wealth of information that allows him to determine what advisory path will lead to success. Furthermore, with all clients working with The Value Builder System™ and providing a level of consistency, business owners have the confidence and comradery they need to help improve their business.

In a matter of a few months, Green and his team at Tab North Shore were able to get The Value Builder System™ up and running and fully integrated into their practice. Having found immediate results with six new engagements, Green is confident that as he continues to leverage The Value Builder System™, the TAB North Shore will only continue to grow.



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