

VALUE BUILDER STORY:

MassMutual Now Has an Accurate Method for Determining Business Value

BACKGROUND

The MassMutual Financial Group is a Fortune 500 life insurance company providing life insurance and planning services for more than 170 years. Brian Trzcinski is MassMutual's Director of Business Market Development. He has been working in the insurance industry for more than 20 years and is also a Certified Exit Planning Advisor (CEPA).

BUSINESS CHALLENGES

Trzcinski was searching for a software that helped him address two key areas. First, he needed an accurate and data-driven assessment of a business and its value. Trzcinski found that many of his clients were misinformed. They had evaluated their businesses and had perceived expectations of their value. He was looking for a tool that would provide an objective and accurate assessment of business value. This would lead to a better foundation for business and personal planning.

In addition, when advising owners looking to improve their business, Trzcinski needed a proven framework. A structured process to follow would ensure consistency and repeatability across a wide range of business owners.



ADVISOR: BRIAN TRZCINSKI

Type of Advisor:

Director of Business
Market Development

Number of Years Established: 20+

RESULTS



Leverages an accurate assessment for determining business value



Has a proven and repeatable process for helping owners increase their

WHY THE VALUE BUILDER SYSTEM™

The Value Builder System™ checked off all the boxes and is now a welcome addition to Trzcinski's advisory toolbox.

Trzcinski begins with the Value Builder Questionnaire, which assesses a business based on 8 metrics important to acquirers. The auto-generated report then summarizes the company's current strengths and weaknesses.

The Value Builder report effectively benchmarks where the business currently stands. Trzcinski then interprets the results and assesses if his expertise will benefit the business owner. In a matter of minutes, he can rapidly determine a business owner's fit for his services, significantly reducing qualification time. Furthermore, he is provided a wealth of critical data. Describing the questionnaire's impact, he said, ***"Without having that sort of assessment and doing that analysis upfront,"*** Trzcinski says, ***"you can't expect to do effective business planning and personal planning with the owner."***

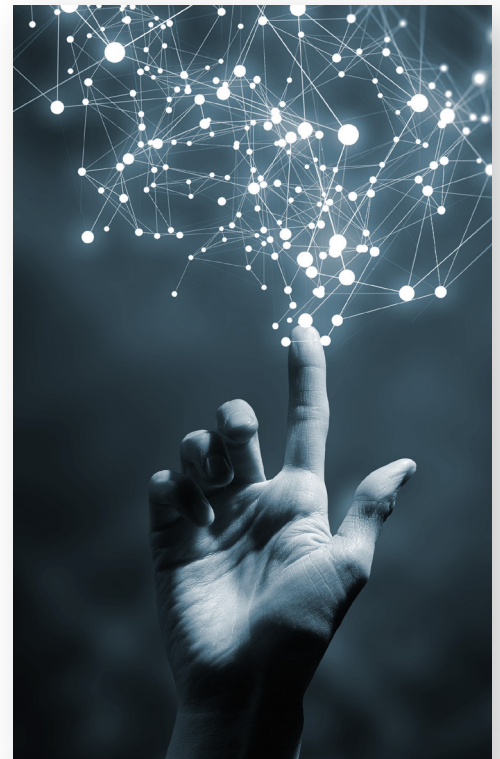
As an experienced advisor, Trzcinski had not come across a tool quite like this. Impressed with it, he said, ***"There are a lot of tools out there that only focus on the number. You put in a bunch of financial information, and it spits out a value."*** That is, Trzcinski says, ***"a very historical-looking view of the business. It doesn't give the business direction on how to take ownership of their value."*** The Value Builder System™, on the contrary, does just that: It gives business owners ***"key insight into what they need to do from an operational perspective, and they can start to build plans to grow that value."***

Finally, Trzcinski walks his clients through the Value Builder Engagement, a 12-step value building platform. These steps build progressively on one another as focal points of improvement and growth. He leverages this statistically proven and repeatable process to guide owners through the essential steps for building a valuable company.

RESULTS

With The Value Builder System™, Trzcinski has solved a few crucial challenges. The Value Builder Questionnaire provides an accurate assessment of company value. It gives a clear snapshot of the business, not from a historical perspective but with both eyes on the future. For Trzcinski, the questionnaire helps them, ***"know where they stand today. But then they can put steps in place to grow the value of their business over time."***

The Value Builder Questionnaire gives Trzcinski a clear understanding of a company's current value and what areas need to be addressed to increase that number. With a robust benchmarking tool and a proven advising structure to follow, Trzcinski helps owners through the difficult yet rewarding journey of building a valuable company.



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