

VALUE BUILDER STORY:

Advisor Increases Revenue by 40% With The Value Builder System™

BACKGROUND

For over 30 years, Eugene Wallace has been a tremendous resource and trusted advisor to many family-owned businesses. At Family Business Advisers, Wallace specializes in succession planning for businesses transitioning ownership from one generation to the next. In addition, Wallace has expanded Family Business Advisers and now guides owners who are looking to sell their business. Working exclusively with family owned businesses, Wallace is able to understand the intricacies of succession planning and has become the go-to expert for many generations of leaders.

BUSINESS CHALLENGES

Having built a strong foundation of succession planning for family-owned businesses, Wallace saw an emerging opportunity in another area, advising owners looking to sell their business. The team at Family Business Advisers could not ignore the growing demand for business owners seeking value building and exit planning consulting. With years of experience assisting business owners successfully transition between generations, providing guidance for those looking to sell grew to become a natural progression for Wallace.

In order to focus on this new advisory arm of his business, Wallace was on a search for a tool that had a proven track record of helping owners build value and successfully sell their business. Additionally, Wallace needed an effective way to generate leads and increase awareness for this new service being offered. Lastly, Wallace needed this new technological partner to be multifaceted and also enhance his succession planning efforts.

With these challenges in mind, Wallace was on a search for a platform that can help spearhead this new value building and exit planning arm of his business. With the number of business owners looking to sell, Wallace and his team at Family Business Advisers did not want to miss out on this growing market.



ADVISOR: EUGENE WALLACE

Type of Advisor: Business Coach

Number of Professionals: 30+

Number of Years Established: 38

RESULTS



Wallace was able to increase his revenue by **40%** after deploying The Value Builder System™



Wallace is convert **2 to 3x** more leads using The Value Builder System™

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

Utilizing The Value Builder System™ has fueled Wallace's new advisory arm, spawned new programs and helped grow the business in a number of ways. By strategically deploying The Value Builder System™, Family Business Advisers has increased revenue by up to 40%.

In order to solve his first issue, generating interest from prospects, Wallace leverages the Value Builder Questionnaire. By simply sending a web link to prospective clients, business owners are given an online assessment which takes 15 minutes to complete, and provides them with a detailed report on the strengths and weaknesses of the business. This simple, yet powerful tool has helped Wallace convert 2-3x more leads into clients. The Value Builder Questionnaire is able to effectively identify areas of concern for business owners and opens their eyes to the potential growth they can experience.

Furthermore, with the data that comes from the assessment, Wallace is able to begin fruitful discussions with business owners about how building value will yield a much greater result when selling. When describing its impact, Wallace said, ***"The Value Builder System™ helps in the discovery process, in determining where they are, developing a plan and assisting them critically in doing and documenting the work."*** Wallace has been impressed with how all-encompassing The Value Builder System™ can be for business owners, beginning in the discovery phase, all the way to when a business is sold.

The Value Builder System™ has also helped Wallace apply value building principles to his core strength, succession planning. Once the Value Builder Questionnaire is completed, Wallace and each business owner have a clear understanding of where the business stands when it comes to the 8 Key Drivers of Company Value. Wallace then works together with the owner and their children, delegating responsibilities to start improving upon their given key driver(s). This activity gives owners confidence that their business is in good hands and will continue to thrive. Moreover, by improving upon these key drivers, the business is able to become more valuable in the event that they decide to sell.

The Value Builder System™ has also been the source of a new program at Family Business Advisers which has boosted revenues. Wallace created a peer mentoring program where 10-12 business owners gather monthly and together work through The Value Builder System™. Rather than traditional one-on-one sessions, this new group setting has enabled Wallace to take on more clients than ever before, as well as organize multiple groups. When discussing this new initiative, Wallace said, ***"The Value Builder System™ gives me more consistent, directed and integrated content to work with business owners."*** With each session, Wallace does little planning, but instead relies on The Value Builder System™ and its step by step methodology.

RESULTS

The Value Builder System™ has proven to be a worthwhile investment for Family Business Advisers. In addition to providing clients with a new type of advisory - value building and exit planning - Wallace has been able to incorporate The Value Builder System™ within his existing succession planning process.

With newly introduced group coaching sessions designed around The Value Builder System™, Wallace has seen revenue surge through this profitable billable service, in addition to increasing his capacity to advise more clients. Without the need for a marketing resource to craft a presentation, Wallace allows The Value Builder System™ to speak for itself.

With The Value Builder System™ as a primary tool in his advisory service, Wallace has found several ways to seamlessly integrate its use within his practice. Wallace continues to be an advocate for The Value Builder System™, recommending it to other advisors within the firm. In addition to finding operational efficiencies in lead generation, succession planning and group coaching, Wallace was able to achieve another goal - helping business owners build value within their company and have a successful exit.



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