## VALUE BUILDER STORY:
# Qualifying Clients Goes From Months of Work to Days

## BACKGROUND

Kerry Boulton is the owner of Exit Strategy group based out of Australia. Boulton's main focus is helping business owners develop an effective exit plan when departing from their business. Previously, Boulton was the owner of Freight Management International which she was able to grow and sell for a multimillion dollar turn around. She later established Nexus Business Coaching where she developed business development programs for entrepreneurs looking to grow. More recently, Boulton is a highly sought after public speaker and has authored a book titled 'The Uncensored Truth About Exit Strategies.'

## BUSINESS CHALLENGES

When assessing the current market, Boulton recognized growing demand for exit planning consulting, with many business owners planning to list and sell their business. With years of experience as a business coach, she made the decision to shift focus to exit planning, but needed to address a few things within the Exit Strategy Group.

Firstly, Boulton needed a lead generation strategy. As a successful author, Boulton already has a large and growing database of business professionals who purchased her book. Boulton needed a method for nurturing those leads into potential advisory clients to help start developing a pipeline of customers.

Boulton's second challenge was the qualification process. When assessing if a lead was a good fit for her services, Boulton used a wide range of activities. A combination of phone calls, checklists and interviews were required to get the necessary information. This process was often time-consuming, taking up to two to three months prior to making a final assessment. Boulton knew that in order to be successful, she needed to speed up this process and find a new way to efficiently qualify leads.

With these challenges in mind, Boulton went on a search for a technological partner that can help generate leads and provide continuous nurturing. In addition, this tool needed to provide prospecting solutions that can improve the entire qualification process as well.



## ADVISOR: KERRY BOULTON

**Type of Advisor:** Business Coach
**Number of Professionals:** 1
**Number of Years Established:** 30+

## RESULTS

The Value Builder System™ helped Boulton condense her qualification process from **3 to 4 months** to just minutes.

Boulton no longer has to worry about leads, with The Value Builder System's Nurture Cycle running.

### KEYWORDS

Building Credibility, Becoming the Trusted Advisor

### MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

## WHY THE VALUE BUILDER SYSTEM™

Boulton's first concern of lead generation was quickly solved with Nurture Cycle, an automated email campaign that comes out-of-the-box with The Value Builder System™. Boulton first entered her large database of leads into the Nurture Cycle. In doing so, they began receiving automated marketing emails, expertly produced by The Value Builder System™. These include podcasts, whitepapers, blog posts, videos and other engaging content. Boulton found that as these emails were sent, Exit Strategy Group remained top of mind and many business owners reached out to begin discussions. Boulton was able to leverage this new found lead generating strategy without having to lift a finger.

Boulton has also taken advantage of The Value Builder Questionnaire to condense her qualification process from 3 - 4 months to a matter of minutes. Previously, Boulton relied on a long list of activities to assess potential clients, including phone calls, checklists and notetaking. This process has now been replaced with The Value Builder Questionnaire - an assessment that is sent to business owners online. Once completed, a report is generated, highlighting specific strengths and weaknesses of the business. When discussing this powerful tool, Boulton said, *"viewing the results of the questionnaire immediately lets me know if they are a good candidate."*

With The Value Builder Questionnaire, Boulton has been able to shave off months of work when qualifying prospects. With this new quick and efficient process, Boulton can handle more prospects at once, fueling a pipeline of new clients. This time savings has also enabled Boulton to focus on other areas of the business, and remain confident that The Value Builder Questionnaire is collecting all the necessary information.

Once clients are onboard, Boulton has been impressed with The Value Builder System™ as an effective coaching tool. When compared to previous coaching tactics Boulton said, *"It is easy to go down all sorts of rabbit holes, but what's really important is that you can go to different modules based on the needs of the client. It's such a good tool to draw you back so you stay on track."*

The Value Builder System™ has also helped business owners see their business from a different perspective. Boulton notes that it is an extremely important grounding tool and reveals what specific areas are driving success and what needs improvement. With owners in the proper mindset of growing and potentially selling their business, it becomes much easier to achieve success.

## RESULTS

As an experienced business coach, Boulton's investment in The Value Builder System™ has proven to be the perfect complement. With a renewed focus on exit planning, Boulton can rely on the Nurture Cycle to ensure leads are constantly receiving relevant content. Furthermore, with The Value Builder Questionnaire, Boulton has integrated this robust tool to create a much more efficient qualification process.

Boulton is also a frequent attendee of The Value Builder Summit, making the trip annually. The event brings together advisors, brokers, wealth managers and a wide range of professionals to network and share best practices. Having experienced tremendous success with The Value Builder System™, Boulton and her team at Exit Strategy Group have found a partnership that will last for years to come.

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