

VALUE BUILDER STORY:**What Used to Take Weeks
Now Takes Minutes with
The Value Builder System™****BACKGROUND**

With over 40 years of experience, Marquita Wiley has been successfully coaching and consulting businesses in the IT and Financial Service industries. Wiley is the founder and CEO of Innovative Business Advisors, and focuses on helping businesses in the mergers and acquisitions arena.

Wiley has previously worked with General Motors Corporation, IBM, Citicorp Mortgage, and Bank of America. In 2000, Wiley was named Premier Banking Executive for the Midwest region of Bank of America. As Premier Banking Executive, Marquita was responsible for P&L management of a \$150 MM business.

BUSINESS CHALLENGES

Innovative Business Advisors provides valuation tools, advisory consultation and training to help businesses reach new heights. When assessing these offerings, Wiley saw potential growth in a specific kind of consulting - helping owners build value in their business in order to eventually exit successfully. With the expertise as a CEPA (Certified Exiting Planning Advisor), Wiley decided to put a plan in place to better serve owners who are planning to sell their business. When discussing this untapped market, Wiley said, ***"This gave us a huge opportunity to focus on working with owners who are on the horizon of selling their business and getting that business into perfect shape so that they can get their best value."***

In order to focus on this new opportunity, along with Innovative Business Advisors's other services, Wiley needed a solution that addressed a number of challenges. Firstly, Innovative Business Advisors needed to increase marketing efforts to identify leads and qualify potential customers. In addition, Wiley needed a repeatable framework that could handle a large influx of prospect requests and customer advisory services. Most importantly, Wiley knew she needed an all-in-one value building platform that seamlessly integrated into her existing practice service offering.

**ADVISOR: MARQUITA WILEY**

Type of Advisor: Mergers & Acquisitions Professional

Number of Professionals: 6

Number of Years Established: 15+

RESULTS

Wiley reduced her qualification process from weeks to minutes using The Value Builder System™



Innovative Business Advisors is now able to handle more clients at once using The Value Builder System™ as their framework.

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

Wiley identified The Value Builder System™ as the perfect complement to Innovative Business Advisors's offerings. Wiley's first area of focus was to target business owners who were looking to sell. Once this was accomplished, Wiley shifted her focus on utilizing The Value Builder System™ to efficiently get new clients to sign.

Wiley first leveraged The Value Builder System™ automated email nurture cycle. This allowed her to send prospects regularly scheduled marketing emails such as articles, whitepapers, podcasts and videos, all of which increase engagement and boost thought leadership - without lifting a finger.

When discussing the impact of the email nurture cycle, Wiley said, ***“Over time, clients in the nurture cycle eventually move through the PREScore™ and the Value Builder Assessment, which gives us a nice basis to have a more in-depth conversation with them”.*** By sending engaging emails, Wiley noticed that clients were initiating action with The Value Builder System™ themselves. The PREScore™ (Personal Readiness to Exit Score) is an 8-minute online questionnaire that evaluates a business owner's readiness to exit their company on a personal level. The Value Builder Questionnaire provides businesses with a score on how valuable their business currently is. Having clients complete these two crucial questionnaires prior to their first conversation helped Wiley compress 8 hours of work under her old manual process to just 30 minutes with The Value Builder System™.

Previously, Wiley would conduct 3-4 hour long interviews with clients, resulting in countless Word documents and Excel spreadsheets. Wiley would also need an additional 3-4 hours to compile interview data, edit and create a presentation. After a few rounds of edits and phone calls with the client, it would sometimes take Wiley up to a month to get all the information she needed. Life with The Value Builder System™ has dramatically reduced the time spent preparing proposals from weeks to now 30 minutes.

After the initial assessment, Wiley and the client are provided with a condensed 28 page document summarizing the results. The Value Builder System™ provides Wiley with a much more robust online solution that houses all important information in an easily accessible portal. In addition, clients also have access to documents, providing them greater visibility into the value of the work they put in.

The Value Builder System™ has also helped Wiley identify business owners who are holding on to too many processes, a concept called Hub & Spoke, and is one of the eight drivers of company value. When discussing this common blindspot, Wiley said, ***“more often than not they are doing more work than they need to. They need to spend time looking at talent within the organization, and get to a point where they are letting go and being a CEO.”*** Being a worker bee rather than a CEO prevents many owners from taking a step back and growing the business. With The Value Builder System™, many business owners are able to recognize this early on, allowing them to address the issues in their organization and get the most value back when exiting.

RESULTS

With the The Value Builder System™, Wiley has found an effective framework that is easily repeatable for all clients, allowing her to increase the volume of work Innovative Business Advisors can take on. This has allowed Wiley to increase her productivity while trusting The Value Builder System™ is doing the bulk of the work. When explaining her greatest benefit thus far, Wiley states, ***“What has changed the most is my efficiency, and how many (clients) I can handle at one time. I feel like I can ramp up and carry more simultaneous clients much more than I was able to with my Word documents and Excel spreadsheets”.*** This has allowed Wiley to increase the number of clients she can work with - ultimately positively impacting her number of billable hours and the company's deal flow.

Wiley was also able to transform a prospect into a customer with little effort leveraging the nurture cycle. By entering this client into The Value Builder System™ nurture cycle, the prospect became interested in the value building space. The prospect reached out to Wiley to procure her services. This led to Wiley generating income through advisory services with the owner and also earn a fee on the sale of their business.

The Value Builder System™ has been a highly effective addition to Wiley's toolkit. Innovative Business Advisors has eliminated long hours of manual interviews and notetaking, which has freed up time to take on new business and increase available billable hours, helping them grow and scale. Moving forward, Wiley knows that she can continue to rely on the proven, repeatable framework that The Value Builder System™ provides.



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