

VALUE BUILDER STORY:

Become Their Most Trusted Advisor with The Value Builder System™

BACKGROUND

Ray Croff is the CEO and president of Mobius Financial Advisors. Croff also serves as an adjunct professor at the University of North Texas and is a member of the Society of Financial Service Professionals and National Association of Insurance and Financial Advisors. Currently, Mobius Financial Advisors focuses on wealth management, retirement planning and exit planning. Having also been an entrepreneur for 15 years, Croff is the perfect resource for many business owners looking to successfully sell and exit their business.

BUSINESS CHALLENGES

When doing research into the financial consulting industry, Croff came across a staggering statistic - only two out of ten companies looking to sell their business are able to make a sale. When discussing this, Croff said, ***"I was assuming that all of my clients would successfully sell, and monetize it, and now I'm thinking, 80% of my clients might fail."*** This realization led Croff to rethink his business strategy and begin a search for a proven and trusted tool that enabled a higher success rate for his clients.

With this shift in strategy, Croff needed an all-in-one value building platform that he was confident could help business owners make a successful exit. On his checklist, Croff needed a tool that had marketing capabilities to help increase brand awareness and generate leads. Croff was also on the lookout for a user-friendly platform that provided business owners with dashboards and reports on the progress they were making. With the right technological partner, Croff knew he would be able to build trust with more business owners, develop a large network and establish Mobius Financial Advisors as a leader in exit planning advisory.



ADVISOR: RAY CROFF

Type of Advisor: M&A Advisor

Number of Professionals: 4

Number of Years Established: 15+

RESULTS



Croff was able to increase his number of clients and his fees after implementing The Value Builder System™ into his practice.



The Value Builder System™ enables Croff to be his client's most trusted advisor.

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

With a renewed focus on exit planning, The Value Builder System™ was the perfect pairing. Now fully integrated into their practice, Mobius Financial Advisors has leveraged an effortless marketing resource, increased referral leads and most importantly, improved their bottom line.

Croft first leveraged The Value Builder System™ automated email nurture cycle. This allowed prospects to receive regularly scheduled marketing emails such as articles, whitepapers, podcasts and videos, all of which come out-of-the-box with The Value Builder System™. This feature allowed Croft to educate clients and prospects, and helped him become a thought leader in value building and exit planning. Without having to do the work, Croft was able to accelerate his marketing efforts and generate new leads.

Croft is also impressed with how quickly The Value Builder System™ is able to provide his clients and prospects with a report on vital business metrics. When discussing the importance of The Value Builder Questionnaire he said, ***“In 20 minutes, I can give my clients a high level number on what their business is worth, and how they stack up against their competition. The assessment creates a nice report that’s easy to understand and shows where they stand in certain areas.”*** With simple visualizations, and concise reports, The Value Builder System™ provides business owners with a clear picture of how the business is performing. This has also proven to be an excellent conversation starter for Croft and has become an efficient way to win prospects over.

The Value Builder System™ has also helped Mobius Financial Advisors improve their bottom line. When describing how focusing on the exit planning has impacted his business, Croft said, ***“The sale of a business is a big chunk of money, and it’s much easier to manage that one asset. This has allowed me to increase my fees”.***

With the highly repeatable process that The Value Builder System™ provides, Croft has been able to quickly scale up, take on more clients than ever before, and boost profits. Rather than managing all of a client’s assets, Croft is able to dedicate his focus on a much more lucrative project - helping owners build value and exit their business with a profit.

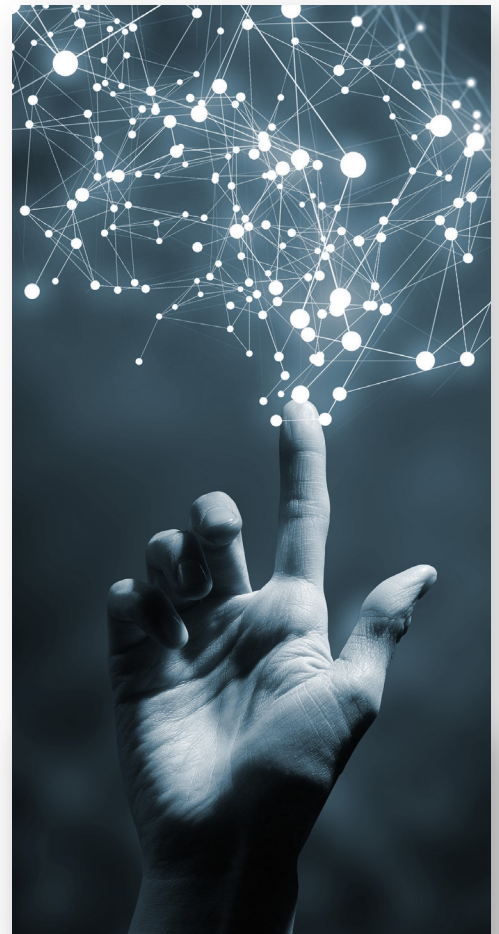
Having proven to be an expert in value building and exit planning, The Value Builder System™ has helped Croft generate a greater number of referral leads. Having worked with many happy business owners, Mobius Financial Advisors are experiencing a large number of referrals seeking their services.

RESULTS

With The Value Builder System™ in their toolkit, the team at Mobius Financial Advisors are reaping the benefits of a highly effective value building platform. With an automated email marketing program, Croft can continue nurturing his pipeline of prospects. By leveraging simple assessments like the PRESCore™ (Personal Readiness to Exit Score) and the Value Builder Questionnaire, business owners are able to fast forward into the future and envision a successful exit.

In addition, implementing The Value Builder System™ has enabled Croft to leverage the larger community of users - brokers, accountants and advisors - which can lead to even more partnerships in the industry. With a large range of professionals using The Value Builder System™, networking becomes much smoother, allowing like-minded professionals to engage work together.

Having developed a streamlined process for helping his clients, Croft realized that the relationships formed have led to additional work after the business has been sold. When discussing how The Value Builder System™ has enabled him to extend his business relationships, Croft said, ***“If you develop this process, you have become their most trusted advisor. When it comes time to manage their funds when they sell, they will look to you.”***



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