

VALUE BUILDER STORY:

Qualify Leads 8x Faster with The Value Builder System™

BACKGROUND

Steve Conwell is the owner and CEO of Final Ascent, a business consulting firm that specializes in exit planning. Conwell joined Final Ascent in 2017 with a wealth of experience in many leadership roles. In 2002, Conwell was a co-founder of ECC, a national consulting and recruiting firm. From 2009 to 2017, Conwell was the Market President of a consulting firm that provided professional accountants to small businesses. Most recently, he was the interim CFO for Rylex Capital in residential real estate. In recent years, Conwell realized growing demands for a different kind of consulting, value building and exit planning and made the decision to make this his focus.

BUSINESS CHALLENGES

In order to be a successful player in the value building and exit planning space, Final Ascent identified a few areas that needed to be tuned up. Conwell's first area of concern was the qualification process. When assessing leads, Conwell conducted two hour interviews to find out if a prospect was a good fit. Additional hours were needed to prepare 20 page presentations - all before they were brought on as a client. Conwell knew that there must be a more efficient and effective way to qualify prospects.

The second area of concern was Final Ascent's close ratio. With 15% to 20% of prospects turning into customers, Conwell knew that improving this would fuel business growth and increase revenues.

With this checklist, Conwell turned to The Value Builder System™ - a tool he once used as a CFO at a previous company. With this all-in-one value building platform, Conwell looked to speed up his qualification process and increase his close ratio. Improving these two areas would lay the groundwork for Final Ascent's eventual success.



ADVISOR: STEVE CONWELL

Type of Advisor: Management Consultant

Number of Professionals: 1

Number of Years Established: 3+

RESULTS



After implementing The Value Builder System™ into his practice, Conwell is able to qualify leads **8x faster**.



Conwell was able to increase his close ratio to **70%** after deploying The Value builder System™

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

To solve his first challenge, speeding up the qualification process, Conwell turned to The Value Builder Questionnaire, a 15-minute online assessment. This highly effective tool is used by business owners to determine strengths and weaknesses within their business, and pinpoints what needs to be addressed in order to build value in the organization. When discussing its impact, Conwell said, ***"Within 15 to 20 minutes, we know this is an account we can work with."*** When compared to his old manual process of interviews and paperwork, Conwell can now qualify prospects 8 times faster. Taking advantage of this highly efficient process, Conwell has been able to save time, qualify more prospects than ever before and has increased available billable hours.

Not only has the Value Builder Questionnaire been invaluable in saving time in qualifying prospects, it has enabled Conwell to convert more prospects into customers. The Value Builder System™ provides owners with quantifiable goals, and guides them through the value building process which results in a profitable sale. By showcasing this roadmap toward success, more businesses have chosen to partner with Conwell and Final Ascent. With the help of The Value Builder System™, Conwell has increased his close ratio to 70%, representing a 50% increase in conversions, allowing him to quickly grow his customer base.

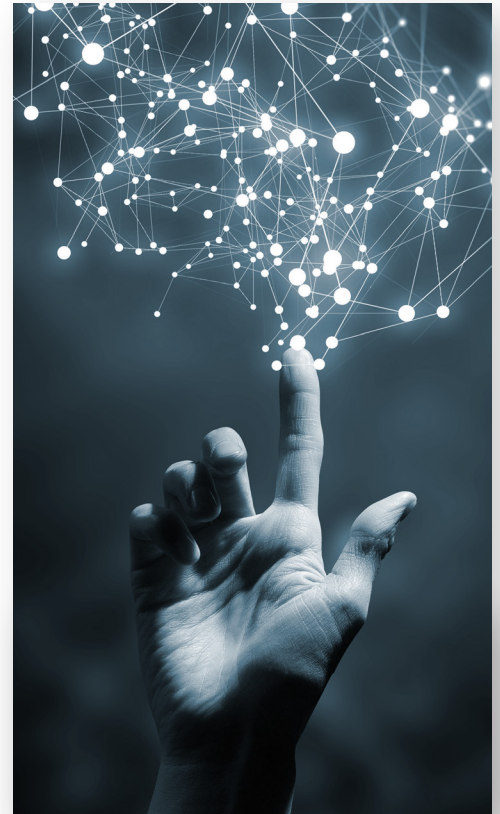
Conwell also believes that The Value Builder System™ is an innovative tool that provides business owners with tremendous ROI. When discussing this, Conwell said, ***"From a value perspective, all the services I provide are added back when you go to market. It is not like business consulting where it affects your net profits, this will get paid for by the buyer."*** This sentiment has proven to be true with each Final Ascent client, and this strong business case has helped Conwell grow his customer base.

Conwell is a firm believer that The Value Builder System™ makes businesses look more attractive in the eyes of the buyer. The Value Builder System™ assists businesses in a few key areas that are important to buyers, such as increasing net promoter score (NPS), and healthy year over year growth. A trend has emerged where owners who have successfully worked on these areas generate more interested buyers and multiple offers - driving the sale price even higher.

RESULTS

In addition to fully utilizing The Value Builder System™ in their day-to-day, Conwell has also taken advantage of The Value Builder Summit. This annual event brings together advisors, coaches, accountants, business brokers and world class keynote speakers to network and share best practices. When explaining the atmosphere at the event, Conwell said, ***"Everyone at The Value Builder Summit is all about building value and they live it and breathe, whether its business owners or advisors like myself. We're just excited to be there and will continue attending for a decade to come."*** Each year, Conwell is able to bring back new actionable ideas, processes and initiatives to his team.

Having successfully achieved his goals of a new efficient qualification process and improving his close ratio, Conwell and his team at Final Ascent continue to thrive. When explaining how the platform has impacted his business, Conwell said, ***"With every single account we have, we use the The Value Builder System™"***. Final Ascent has been able to successfully integrate The Value Builder System™ into their existing processes and have become a much more efficient operation. As a result, Final Ascent now has the tools to continue to grow and scale.



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