

The Engagement Modules



Your Value Builder Assessment

The first month of each year is dedicated to getting or updating your Value Builder Score and measuring your progress on the eight key drivers of Value.



The Hub & Spoke Score

In month seven and then annually thereafter, we will dedicate our time to minimizing your company's dependence on you personally.



Your Scalability Finder

In the second month of each year, you will complete The Scalability Finder exercise in which we identify your products and services that have the potential to scale up the fastest.



The Switzerland Structure

In month eight and then annually thereafter, our focus will be on reducing your reliance on any one customer or on any one employee.



The Customer Score

The third month of each year is dedicated to benchmarking your customer's satisfaction with your business against the most successful and fastest growing companies in the world.



The Customer Score

The ninth month of each year is dedicated to the continued benchmarking of your customer's satisfaction with your business against the most successful and fastest growing companies in the world.



Your Growth Potential

In the fourth month of each year, we will review your product and service mix to maximize your growth potential.



The Valuation Teeter Totter

In the tenth month and then annually thereafter, our focus will be on cash flow. Our goal will be to maximize the cash flow coming from the day-to-day operations of your business.



The Automatic Customer Builder

In month five and then annually thereafter, we'll focus on increasing both the number and quality of recurring revenue streams flowing into your business.



Your Short List Builder

In month eleven and then annually thereafter, we will develop and fine tune a short list of potential acquirers with a strategic reason and also the resources to buy your company.



The Monopoly Control

In month six and then annually thereafter, we will review your company's positioning in the market using a tool called The Positioning Planner.



Your Envelope Test

In month twelve and then annually thereafter, the Envelope Test will help you articulate your goals for your business and your life.