

How to Sell More Valuation & Advisory Services: 17 Questions to Ask Every Prospective Client

The right questions can uncover business opportunities and risks that your prospective clients never considered. Asking thoughtful questions during your next prospective client meeting will help solidify your role as a trusted advisor while identifying ways a valuation could help the company.

Introduce several of these questions into your next conversation to identify challenges the business owner faces and opportunities for you to help.

1. Do you have a business plan?
2. What are some of the challenges your business faces?
3. Have you performed a risk assessment or SWOT analysis?
4. Have you researched your competitors? If so, how does your company's financial success compare to peers in the industry?
5. Does your company have an advisory board? If so, is it made up of senior business professionals?
6. Is your company tracking and revising its business development budget?
7. Has the debt/capital structure been reviewed for optimization recently?
8. Does the company have reliable budgets and forecasts?
9. Has cash flow been measured and forecasted?
10. Are there shareholder buy-sell agreements in place? If so, do they describe how the company is to be valued?
11. Have you considered long term growth opportunities?
12. Have you prepared for future succession or built a plan to ensure that your company is stable at the point of succession?
13. Have you analyzed your supply chain and/or operations to evaluate costs and efficiency opportunities?
14. Are you leveraging technology to drive costs down or sales up?
15. Are personnel cross-trained and new hires adding value?
16. Are clients diversified across industry to mitigate risk?
17. Are vendors vetted for quality and competitive pricing?

About Sageworks Valuation Solution

[Sageworks Valuation Solution](#) is a web-based platform that enables business valuation professionals to streamline workflow, increase realization rates and offer advisory services. Generate an accurate and defensible value using the income, market and asset approaches.

To learn more or request a live demo, please contact:

valuationsales@sageworks.com or 866.603.7029