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10 Things a Business Owner Must Do Now to Have a Successful Exit in the Future.

1. Know your 3-year financial history and be able to explain it in detail.
2. Ensure that your financials are accurate and reported with consistency.
3. Have a basic understanding of your business value today, from a sellers perspective.
4. Have a contingency plan in place for the 5 “Ds”: distress, divorce, disagreement, disability, and death. These 5 Ds are responsible for 50+% of business owners NOT being able to exit on their terms.
5. Understand the importance of intangible capital value of your business and have a plan to improve it:

We estimate that as much as 80% of your business value comes from the following intangible assets: Customer Capital, Social Capital, Structural Capital, and Human Capital

6. Have a written financial “Value Creation” plan that includes 90 day, 1 year and 5 year BUDGETS AND PROJECTIONS.
7. Know how to motivate your team in the relentless execution of the plan.
8. De-risk your business by YOU becoming less key in to day-to-day business success.
9. Assemble your strategic exit team today; know your go-to experts in 6 key areas.
10. Plan holistically: Exit planning is not all about your business. Have a specific vision of what you will do in your Freedom Years, aka in retirement.
 - a. One key reason that sales do not go through is owner’s “cold feet.”
 - b. A second reason that a business sale is cancelled late-in-the game is an owner’s awareness that the NET proceeds are insufficient for retirement.

Need help on any of the above? Contact:

Ronnalee Bury-Prince, CEPA (*Certified Exit Planning Advisor*)

Contact: 602-315-6335

ronna@ambassadorcs.group