

Business Readiness Score	Rating	Considerations
Brand Issues		Does the brand add value?
Company Documentation		Corp. Docs, Legal, Operating agreement, Buy-sell
Compliance Issues		Taxes, Environmental, Regulatory, Retirement
Credibility and Justification		Customers, Awards, Community
Customer Contracts		Customers & strategic alliances, Warranties, Maint.
Employee and Management Issues		Reliance, Competency, Morale, P&P, Turnover
Expense Contracts		Suppliers, Leases, Insurance, Web, etc.
Expense Management		SGA, Insurance, Banking, Cash, Payroll, GM, Payroll
Financials		Taxes, Financial statements, Customer analysis
Immediate Value Readiness		How ready right now - strategic buyer?
Intellectual Property		Trademarks, Patents, Software, Domains
Look at Government Grants		R&D, Fed., State, Local
Management Systems and Forecasts		12 months - 3 years, Scorecard
Marketing Documentation and Systems		Systematic, proof
Payment Considerations		Net proceeds, Terms considerations, Exit options
Personal Expectations		Post sale expectations & plan
Personal Knowledge		Understanding of how buyers place value
Product and Marketing Strategies		Ansoff matrix. Products and Markets Analysis
Revenue Drivers		S&M, Lead generation, Conversion, Conversion rate
Shareholder Goals		Shareholder Alignment when how who
Systems Processes and Databases		CRM, Accounting, customer, sales, fulfillment
Valuation Expectations		Valuation, transition timeframe, needs analysis
<b>TOTAL RATING</b>	-	
<b>MAXIMUM RATING</b>	<b>132</b>	
<b>Readiness Score (Your Total / 132 = %)</b>	-	

**Instructions:**

Step 1. Rate each category from 1-6, based on the below key:

1. Bad/Nonexistent
2. Needs Improvement
3. Slightly Below Average
4. Slightly Above Average
5. Best-in-Class
6. In a Class of One

Step 2. Add all ratings together and put your total in the TOTAL RATING section.

Step 3. Divide your TOTAL RATING by the MAXIMUM RATING of 132. The result will be your percentage READINESS SCORE.

**Example:**

TOTAL RATING = 88

MAXIMUM RATING = 132

$88 / 132 = .67$

READINESS SCORE: 67%



**RTI WEALTH**  
M A N A G E M E N T

	Poor or Non-Existent	Needs Improvement	Slightly Below Average	Slightly Above Average	Best-in-Class	Industry Leader "The Standard"
Common Sense Rating	1	2	3	4	5	6
Range of Value Score	0 – 17%	18 – 33%	34 – 50%	51 – 67%	68 – 83%	84 – 100%