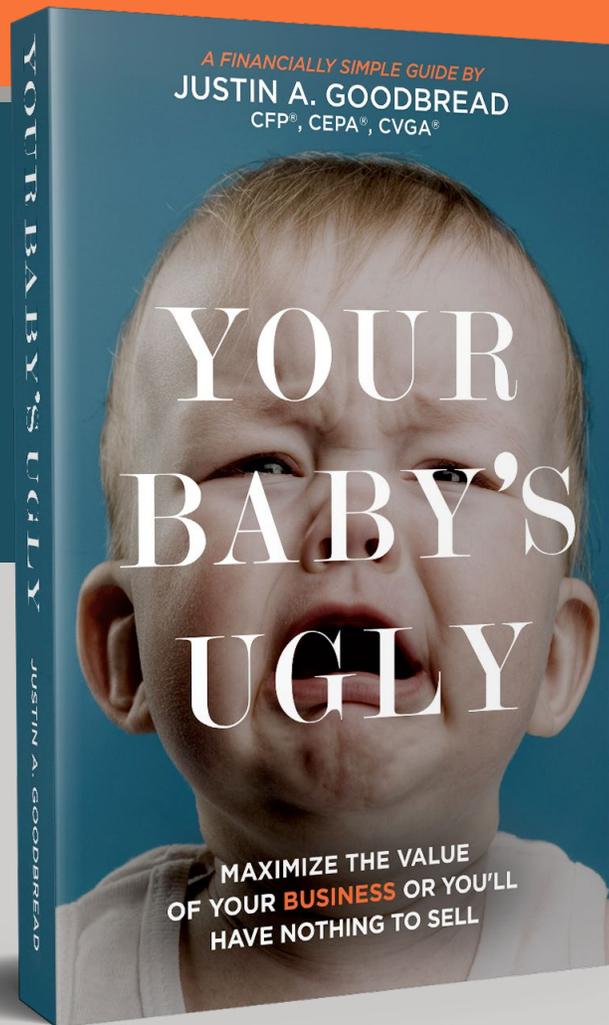


IS YOUR BABY UGLY?

A BUSINESS ASSESSMENT

You assume your business is healthy, growing, and attractive (developing/strong)—but how would your business fair against your competitors? If your business is your baby, others might not want to tell you that “Your baby’s ugly”—meaning your business isn’t as attractive to others as you might believe.

Take this short assessment to find out if your business is Attractive or Ugly and a few helpful tips that could make a huge difference in others’ view of your business.



RATE BELOW ON A SCALE OF 1-5

- 1** = nonexistent/not at all
- 2** = exists but not executed consistently
- 3** = exists, executed but isn't updated
- 4** = exists, executed, updated but needs to be more robust or competitive when compared to competitors
- 5** = fully thought out and implemented. Confident this is best-in-class compared to competitors

1 Your business has a detailed company business plan that is reviewed by an independent board.

2 Your business has operating policies and procedures documented, followed, and consistently reviewed.

3 Your employees have formal, written feedback and performance reviews that reinforces expectations with rewards based on meeting goals.

4 Your business has committed research and development in your company to design new services and products to penetrate new markets.

5 Your business has a well-defined ideal client and consistently markets directly to him.

6 Your business has forecasts and key performance indicators that are achievable by your sales team.

CONTINUED FROM PREVIOUS PAGE

RATE BELOW ON A SCALE OF 1-5

- 1** = nonexistent/not at all
- 2** = exists but not executed consistently
- 3** = exists, executed but isn't updated
- 4** = exists, executed, updated but needs to be more robust or competitive when compared to competitors
- 5** = fully thought out and implemented/confident this is best-in-class compared to competitors

7 Your business has clearly defined the responsibilities of each team member.

8 Your business has a written financial strategy that aligns with your business plan.

9 How confident are you that your key employees are committed to staying with your organization?

10 Your company conducts regular risk management reviews including insurance, data backups, etc.

TOTAL

RESULTS

10-25: Your baby is Ugly

If you scored in this range, I hate to be the one to tell you, **but your baby is ugly**. The questions asked above are regarding the eight key areas of business value. The team at Heritage Investors and Heritage Business Advisors work with business owners every day to identify what areas are the weakest and together develop strategic plans to strengthen each area. The Heritage team would be honored to work with YOU to strengthen these areas to turn your ugly business to a sellable asset.

26-35: Your baby could use some help becoming Attractive

If you scored in this range, your business could use focused help to become more attractive. The team at Heritage Investors and Heritage Business Advisors can help prioritize those specific areas that need improvement to drive the value of the business upwards. Your baby could yield a much higher sale if you focus on the areas needing the most help.

36-50: Your baby might be Attractive, but is it sellable?

If you scored in this area, congratulations—your baby might be attractive, but is it in a place to be sellable? The team at Heritage knows that a business owner needs to start planning their exit far before they are anticipating leaving. This forethought allows your baby to be sellable for the highest profit—so have you seriously thought about how you can prepare for your exit?

