

The chief goal for management of any business is to create, protect and increase value for its stakeholders. All too often the focus is primarily on short-term financial results, and therefore it can be difficult to effectively consider long-term planning – especially as it relates to non-financial strategies. We have combined our CFO Outsourcing capabilities with our Business Valuation expertise to assist management and business owners with their long term goal, enhancing stakeholder value.

We will help you develop strategies that enhance value, beginning with defining your company's value drivers. Once these are identified, we will work with you to create the management reporting structure needed to accurately measure progress towards your goals.

Our Process:

PHASE 1 – BASE VALUE

We will start by performing a valuation of your business, which provides a baseline against which to measure future success. This process will also identify the value drivers for your business, helping us to create productive, profitable strategies. Once we have identified your value drivers, we can begin to strategize the best plan for increasing stakeholder value.

PHASE 2 – VALUE-BASED STRATEGIC PLAN

Once we have identified your value drivers, we will work with you to develop a long term strategic plan focused on enhancing specific drivers. Using this plan as a road map, we will assist you in the development of an annual budget, focusing on the current goals and objectives required to execute upon the plan. The final outcomes of this phase are the benchmarks needed to measure success and how often they should be measured.

PHASE 3 – REPORTING

During the third phase of this process, we will develop a reporting process, the goal of which is to provide your busy management team with the timely, accurate, and actionable information needed to identify progress against the benchmarks identified in Phase 2. The reporting process will include the key measurements (as defined in Phase 2) needed to accurately assess progress against your strategic plan and budget. If necessary, we will also review your compensation program during this phase to ensure they align with your goals.

PHASE 4 – VALUATION

Once your key strategies have been implemented, we will perform another valuation to measure the success of the entire process. From here we can also make any strategy adjustments necessary to further enhance stakeholder value.