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A Value Reimagineering Company

SAMPLE · VALUE LEAK ASSESSMENT · KEY FINDINGS REPORT

Tolland & Pike Can Sell For What It Is Worth If It Proves It Runs Without Ray

A sample Value Leak Assessment report. A founder-led business getting ready to sell, where everything still runs through the owner.

PREPARED FOR

Ray Tolland, Founder
and Owner (fictional)

PREPARED BY

Patrick Meniboon, MBA
Founder & Principal
Value Reimagineer

DATE

Sample report

VERSION

Sample, 7 pages

Fictional sample. Tolland & Pike Mechanical, its people, figures and quotes are invented to show the format of a Value Leak Assessment report. A full report runs 30 to 50 pages and is walked through with the client before it is sent.

SECTION 1

Tolland & Pike Can Sell In 24 Months If The Business Proves It Runs Without Ray First

2.3 / 4	24	31	5
Value driver health (between Weak and Moderate)	Months Ray wants until he sells	Decisions a week that only Ray makes today (team count)	Quick wins: high value and high feasibility

The question. Ray Tolland built a commercial HVAC service business over 22 years, with 14 people and about \$4.2M in revenue, by his estimate. He wants to sell within 24 months. He asked what it would take to sell at a fair price without staying on for years.

The answer. It is reachable, but not yet. Customers trust the business. A buyer will see a business that cannot run without its owner. Ray's team counted 31 decisions a week that only he makes.

Where the value is. Every decision that moves to the team makes the business easier to buy. The goal before going to market is simple: 30 days with Ray away and the business running.

What to do.

1. Hand off the first 10 decisions in 30 days, starting with written decision rights for the office manager.
2. Move pricing out of Ray's head and into the system the team already pays for.
3. Introduce the 15 largest accounts to the team by day 60.
4. Run a 30-day step-away test by day 90, then map the business from customer promise to task with Value Intelligence, so a buyer can see it runs on a system, not a person.

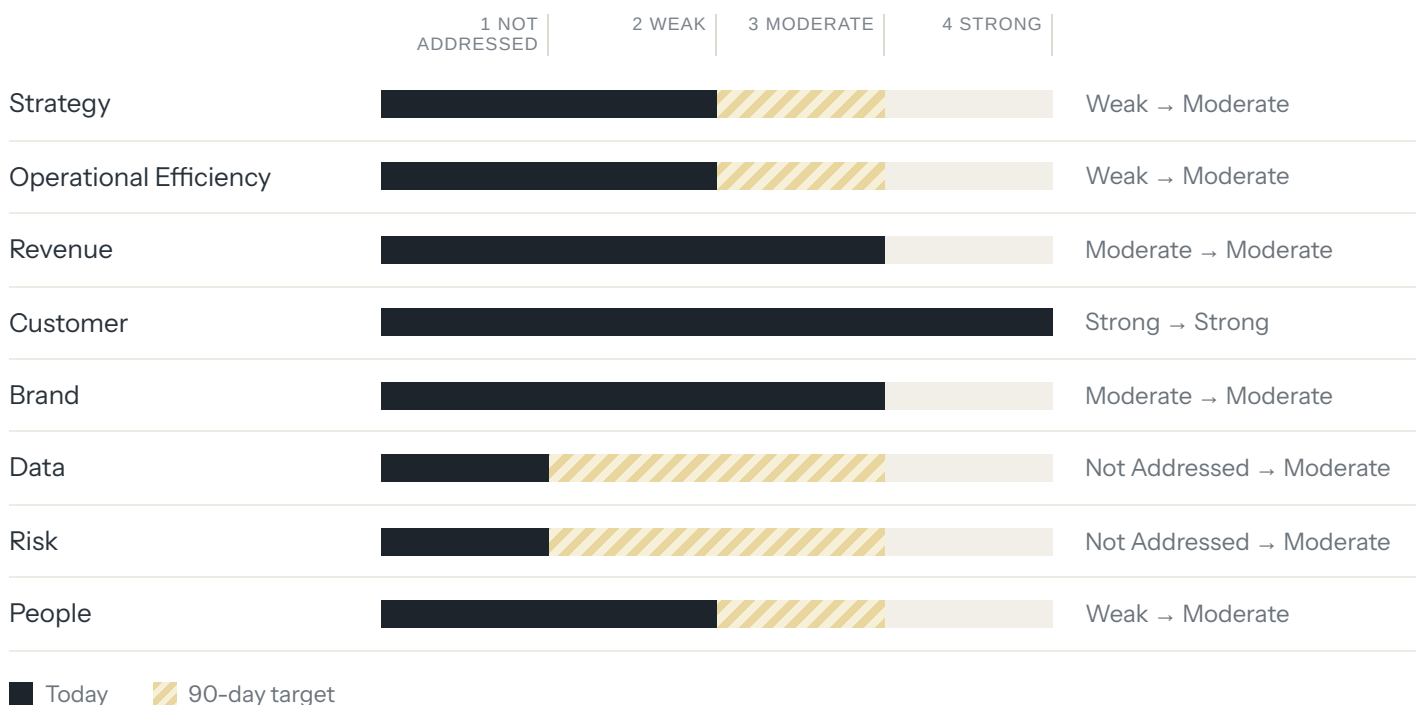
The One Decision Needed Now

Decide that Tolland & Pike goes to market only after it has run 30 days without Ray. Every other move in this report serves that test.

SECTION 2

Customers Love The Business. A Buyer Will See A Business That Cannot Run Without Ray.

EXHIBIT 1 Value driver health today and the 90-day target



Overall value driver health 2.3 of 4. Ratings are the consultant's assessment against the written scale for each driver, based on interview and document evidence.

What Is Working

- Loyal customers. 22 years of repeat work, mostly by referral.
- A capable team. The office manager and lead technician already handle most of the work. They have never been given the authority to decide.

What Is Holding The Business Back

- Ray is the system. Every quote, schedule change and discount waits on him.
- Customers buy Ray. The largest accounts call his cell phone, not the office.
- No clean monthly numbers. A buyer will ask for them first.

SECTION 3

Every Decision Still Runs Through Ray, And A Buyer Will Price In That Risk

Each finding in a full report reads like a short story. Read the headlines alone and the argument holds. The last row is the resolution.

HEADLINE	WHAT WE SEE
You Built A Business Customers Trust	22 years of repeat work, mostly by referral. Customers know they will get a straight answer and a fair price.
Every Decision Still Runs Through You	Your team counted 31 decisions a week that only you make: every quote, every schedule change, every discount and every new hire.
The Business Works Because You Know Everything	Pricing, job history and which customer likes what live in your head. "It's faster if I just do it" has been true for 22 years.
Nobody Else Has Ever Been Allowed To Decide	Your office manager can run the schedule. She has never been told she may.
A Buyer Will Price In The Risk Of You Leaving	Your broker has told you that a business that depends on its owner sells for less, or with a long earn-out that keeps you working for the buyer.
Wait, And You Sell A Job, Not A Business	You either accept a lower price, stay on for years after the sale, or find the exit window has closed.
Prove The Business Runs Without You Before It Goes To Market	Hand off 10 of the 31 decisions in 90 days, give Maria written decision rights, move pricing into the system, and run a 30-day step-away test. Then map how the business keeps its promise, from customer to task, so a buyer can see it runs on a system, not a person.

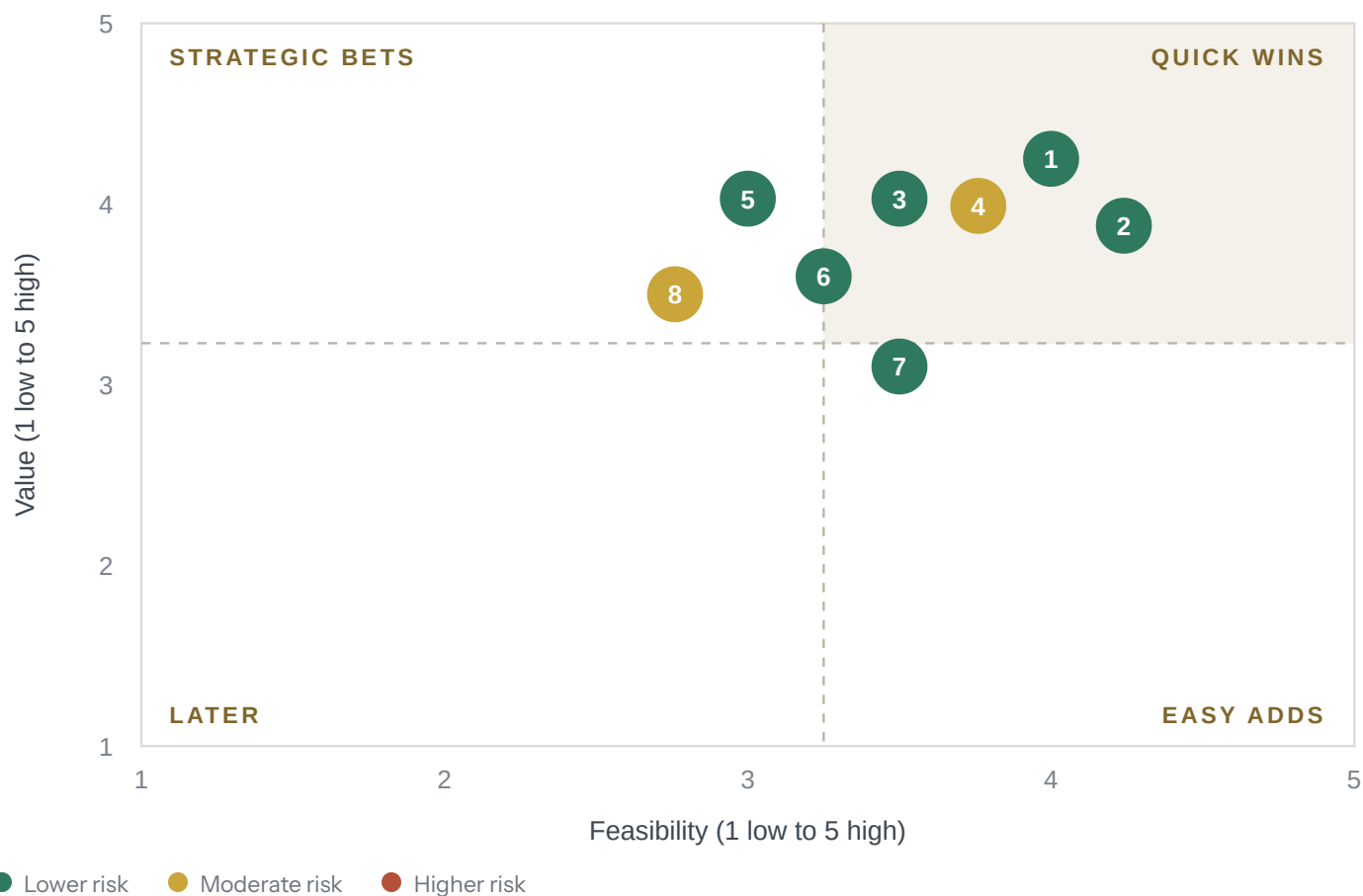
Evidence: E1, E2, E3 · Confidence: High · Moves: M1, M2, M5

"If Ray's out, the quotes stop." Lead technician (fictional)

SECTION 4

8 Moves Were Identified. The First 2 Cost Nothing But A Conversation.

EXHIBIT 2 Moves by value and feasibility



1 Hand off 10 of the 31 founder-only decisions · 2 Give the office manager written decision rights · 3 Map the business from customer promise to task · 4 Introduce the top 15 accounts to the team · 5 Move pricing into the field service system · 6 Renew service agreements without Ray's call · 7 Close the books monthly · 8 Run a 30-day step-away test. Numbers show priority rank.

The 2 highest-ranked moves need no new tools or hires: a list of decisions and a written note giving Maria the authority to make them. The general manager hire is held back on purpose until the step-away test shows whether it is needed.

SECTION 5

The First 90 Days Get The Decisions Out Of Ray's Head, Then Prove The Business Runs Without Him

EXHIBIT 3 The 90-day roadmap, then the path beyond

DAYS 1 TO 30

Get the decisions out of Ray's head

Sort the 31 decisions and pick the first 10 to hand off

Owner: Ray, with Patrick · Done when: 10 decisions each have a named owner · M1

Write Maria's decision rights

Owner: Ray · Done when: Signed and shared with the team · M2

Start the price book with the 40 most common jobs

Owner: Ray, with Maria · Done when: 20 jobs priced in the system · M3

DAYS 31 TO 60

Let the team decide and let customers meet them

Finish the price book and quote standard jobs without Ray

Owner: Maria · Done when: Standard quotes go out the same day · M3

Introduce the top 15 accounts to the lead technician

Owner: Ray · Done when: 8 accounts visited · M4

Close the books monthly by the 10th

Owner: Bookkeeper · Done when: 2 clean monthly closes · M6

DAYS 61 TO 90

Prove it runs without Ray

Run the 30-day step-away test

Owner: Ray · Done when: Every blocked decision logged · M5

Start Value Intelligence: map the business from customer promise to task

Owner: Ray, with Patrick · Done when: Scope agreed at the walk-through · M7

Decide on a general manager using the test results

Owner: Ray · Done when: Hire, promote or wait, decided on evidence · M9

MONTHS 4 TO 12

Complete the Value Intelligence blueprint, hand off the next 10 decisions using it, move renewals to the team, and build 12 months of clean numbers.

MONTHS 13 TO 24

Go to market with a business that has run without its owner, with the evidence to show a buyer.

SECTION 6

Value Intelligence Turns 90 Days Of Handoffs Into The Blueprint A Buyer Will Ask To See

The 90 days prove the business can run without Ray for a month. A buyer will want proof it can run without him for years. That proof is not a person. It is a system anyone can see, check and keep running.

Handed off one at a time, each decision works on its own, but the gaps between them stay in Ray's head. Value Intelligence closes them. It maps how Tolland & Pike keeps its promise, from what customers value down to the tasks that deliver it.

DELIVERABLE	WHAT IT GIVES TOLLAND & PIKE
Customer value definition	What customers really buy, in their words, so it survives the sale
Department contribution map	How the office, the technicians and the bookkeeper each carry the promise
Critical process inventory	Quote, schedule, complete, invoice and renew, each with an owner
Ownership and handoff requirements	Every decision Ray makes today, with who makes it tomorrow
Technology-ready operating blueprint	What the field service system must hold, so it gets set up once and on purpose

The Recommended Next Step

Start Value Intelligence at day 90, once the first handoffs and the step-away test show where the business still depends on Ray. Ray decides. We can help.

A full report goes further. It includes every finding, each move scored in detail with a test and an owner, the value at stake in the client's own numbers, measures of success, the next 14 days, and an appendix with every quote and its source. It is walked through with you, face to face, before the file is sent.

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