

Are You Ready to Sell?

Score Your Business Worksheet

Buyers will look closely at your business when contemplating an offer. Maximizing how you perform in each of the Value Categories below will lead to an optimal transaction.

Score your business on a scale of 1-10 in each of the seven value categories below.
Feel free to reach out to us if you have any questions about areas of concern.

Value Category	Needs Work	→										High Value
Financials	Internally Prepared	1	2	3	4	5	6	7	8	9	10	Reviewed or Audited by external CPA
Team	Owner Dependent	1	2	3	4	5	6	7	8	9	10	Owner Independent
Growth and Scalability	Early Stage/Customer problems	1	2	3	4	5	6	7	8	9	10	Established/large clients
Barriers to Entry	Low barriers	1	2	3	4	5	6	7	8	9	10	Strategic barriers in place
Margins and Profits	Below average margins and profits	1	2	3	4	5	6	7	8	9	10	High margins and profits
Customer Mix	Customer concentration	1	2	3	4	5	6	7	8	9	10	Diverse customer base
Recurring Revenues	One time projects	1	2	3	4	5	6	7	8	9	10	Contracted/recurring revenue

Enter total for all 7 areas here: _____