

CASE STUDY

# PRO/VISION COACHING

**CoreValue helps experienced business coaching and advising firm attract and win broad range of engagements.**

## Overview

An experienced business coaching and advising firm seeks business owners who not only want to improve their company performance, but strengthen its value for a future transition event such as family succession, merger, management buyout or strategic sell. CoreValue helps attract and win a broad range of engagements by connecting the firm's expertise and outside subject matter experts with the client's strategic objectives.

## Challenge

Pro/Vision Coaching, Inc. is a 10 year old firm, with nationwide reach, that exists to help its business clients transition. Each transition event has its own unique complexities, but all have one very important element in common – current business value and how to strengthen it to make the transition successful? The client wants a firm that will see them through this transition timeline, with the expertise to coach them through all the knowns and unknowns.

## Highlights

### Challenge

- Must prove ability to transition businesses successfully
- No way to regularly monitor and quantify progress

### Solution

- CoreValue Discover, which quickly quantifies transition opportunities and enables real-time progress tracking

### Results

- Discover identifies 4 key transition opportunities, enabling Pro/Vision to win new client



## Challenge (ctd.)

The team must be geared to coach and advise the client through each of the 18 CoreValue drivers that directly determine business success and value. Pro/Vision Coaching needs to take the lead role, while bringing in and managing subject matter experts. In the past, a major obstacle in measuring success was providing a real-time dashboard that immediately quantifies progress, justifying the return on investment for coaching and advising services.



**Doug Christy**  
Owner, Pro/Vision Coaching

*"CoreValue Discover allowed us to connect more of our services to our client's needs. It also assured the client that we not only had the expertise to serve them, but the firm has this range of expertise."*

## Solution

Owner and Business Coach Doug Christy (Coach Doug) met with the prospect to discuss their company's operations using CoreValue Discover, the free initial 15 minute analysis of the company's strengths and value. Discover provided the script for the conversation, capturing and analyzing the answers. They immediately generated a Discover Report, which clearly revealed and quantified four major areas of concern. First, their estimated business value and the gap - money they were leaving on the table discounting that value. Second, red flag areas that could bring that value to zero. Third, the report quantified the impact of their top three headaches in dollars and cents. And finally, the prospect could see the company benchmarked against competitors. Coach Doug was able to connect the prospect's challenges and strategic need, with Pro/Vision's coaching and advising services, using the Discover Report as the basis for a compelling proposal - ultimately winning a new client.

## Results

"CoreValue Discover allowed us to connect more of our services to our client's needs. It also assured the client that we not only had the expertise to serve them, but the firm has this range of expertise. Plus, we were able to demonstrate how we would manage outside experts if needed. The discussion showed them we could provide the core services they need both to grow the business, and, if needed, to help with outside issues arising from that growth" says Coach Doug. Pro/Vision Coaching uses CoreValue in its sales and marketing - the CoreValue system includes the software, marketing resources, and in depth training to help the firm thrive.

*"We are looking for a powerful way to help clients see the true depth of expertise we provide. We also wanted to start spending more of our time together solving business problems - rather than on diagnostics. This helps the client save money while freeing up billable time. CoreValue's software and training were the key."*