

How-To: Conduct Discover & Unlock from the Advisor Dashboard

CoreValue Advisor Training Series

About this presentation:

WHAT: Instructions for assessing a business without automatically revealing results to your client.

WHY: To 'control' the assessment (Discover & Unlock Deep-Dive Analysis) by managing the process on behalf of your client. This method allows the advisor to by-pass email authentication (verification of the account) and manage the business owner's account until they are ready to turn over the tool to their client.

HOW: Starting at your advisor dashboard, select the "Invite to Discover" button located to the right of the Prospects: Discover Activity panel

Start with Discover

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Advisor Pipeline Analytics Reports Resources My Account

Dashboard for Joe Montana More Info

Client Scoreboard

0 Clients	\$0 Revenue	\$0 Enterprise Value	\$0 Value Gap	\$0 Value Captured
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Prospects: Discover Activity Invite to Discover Only

Clients Invite to Discover and Deep-Dive

Clicking this button will open the Discover Invitation screen

Input the prospect Name & Email

Once each field has been validated you'll see a green check mark, indicating you can proceed by clicking the "Start" button at the bottom:

Invite to Discover Only

Invite a business to conduct a free Discover pre-assessment evaluation. Upon completion, they will receive a free value report which will also be emailed to you and available from your dashboard.

First Name	<input type="text" value="Harrison"/>	✓
Last Name	<input type="text" value="Ford"/>	✓
Email	<input type="text" value="email@email.com"/>	✓

Enter First, Last name and an email address to associate with this user. Once all three fields are entered correctly, you'll see three green check marks as validation, and the "Start" button, below, will activate

Send email invitation to this prospect.

Start prospect Discover immediately on this computer.

Click START PROSPECT DISCOVER IMMEDIATELY ON THIS COMPUTER



Enter prospect title & phone (optional)

Your Contact Information

Our system will pull the info entered on the prior screen to pre-fill the name and email; optionally, you can enter a title and phone number to associate with this Discover user

First Name *

Last Name *

Email *

Title

Phone

I have read and agree to the [Terms of Service](#) and [Privacy Policy](#). *

* indicates a required field.

Continue

Users must indicate they accept Terms/Conditions & Privacy policy to use Discover & Unlock. Checking this box will enable the "Continue" button below

Set up the business profile

Business Profile

Next, please provide a few details about your business. We collect this information to feed the CoreValue algorithms that calculate the strength of your business operations and your company's projected Enterprise Value.

Your Business Description

Business Name *	<input type="text" value="Harris and Ford Architects, LLC"/>
Industry *	<input type="text" value="Professional, Scientific, and Technical Services (54) ▼"/>
Number of Employees *	<input type="text" value="28"/>
Country *	<input type="text" value="United States ▼"/>
Postal Code *	<input type="text" value="32811"/>
Revenue *	<input type="text" value="25,000,000"/>
Profits (EBITDA) *	<input type="text" value="1,250,000"/>

* indicates a required field.

All fields are mandatory and must be completed to move forward. Check marks (above, right) indicate fields are entered properly and allow you to continue to the next page

Determine prospect objectives & needs

Business Objectives

And finally, while you may have several objectives in mind for your business, please let us know what's most important to you. Your answers here do not impact your final scores, but do help us to understand the needs of the private business community.

Your Business Goals

Primary Objective *

- Create Sustainable Growth
- Prepare to Sell My Company
- Acquire Another Company
- Strengthen My Operations
- Renovate or Repair My Operations
- Align My Team

Within the next 24 months, will you need access to more capital? *

- Yes
- No

Do you have a personal financial plan that dovetails your business and personal objectives? *

- Yes
- No

Continue

Begin the assessment survey

**YOUR LOGO**
appears here

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MARKET DRIVERS



OPERATIONAL DRIVERS



**Growth**

Does your business have a history of consistent growth greater than its competitors, coupled with projected future revenue growth above the market's rate?

Growth refers to a company's top line revenue.

- My business is on fire.
- We're growing at a good clip.
- We're holding steady.
- Business is slowing down.
- Honestly, things aren't so good right now.

Discover will pose 18 questions – one for each value driver – and then immediately present you with an executive report on our findings

Review Discover results as needed

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Harris Industries Discover Report

Advisor Dashboard

Name: Bob Harris
Industry: Manufacturing
Objective: Reorganize as a Team
Completed: Oct 26, 2017 02:35 PM

Potential Business Value

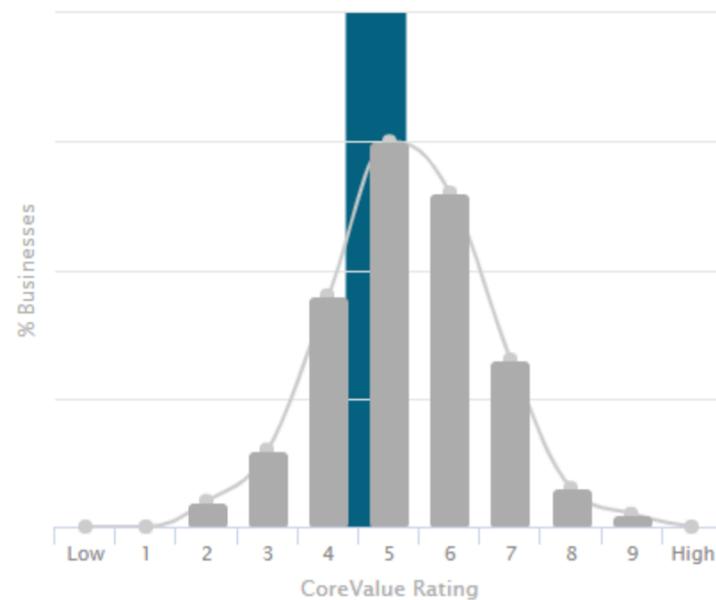
\$9,583,000

Value Gap

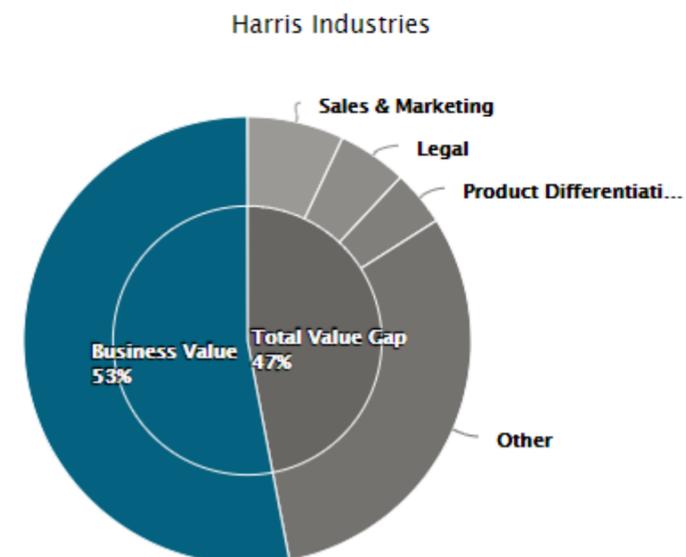
\$2.23M - \$4.14M

Based on the [answers you provided](#), we've identified multiple opportunities to unlock the potential for growth and value trapped inside your business.

CoreValue Business Rating



Growth and Value Opportunity



©

Starting Unlock from the Discover Report screen

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Advisor Dashboard

Harris and Ford Architects, LLC Discover Report

Name: Harrison Ford
Industry: Professional, Scientific, and Technical Services
Objective: Sustainable Growth
Completed: Jan 17, 2018 11:42 AM

Potential Business Value: \$24,969,000
Value Gap: \$5.72M - \$10.6M

Based on the [answers you provided](#), we've identified multiple opportunities to unlock the potential for growth and value trapped inside your business.

CoreValue Business Rating
Growth and Value Opportunity
Harris and Ford Architects, LLC

THIS STEP IS IMPORTANT:

You must return to your dashboard to control the next phase of the process, and the movement through the Unlock Deep Dive Analysis. Select the **ADVISOR DASHBOARD** button at the top right of the report.

Starting Unlock from the advisor dashboard

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Client Scoreboard

0	\$0	\$0	\$0	\$0
Clients	Revenue	Enterprise Value	Value Gap	Value Captured

1 Prospects: Discover Activity Invite to Discover Only

Name	Source Program	Status	Next Step	Value Gap	Last Update
<u>Harrison Ford</u>	CV Sue advisor	Completed Discover	Start Deep-Dive Analysis	\$5.72M - \$10.6M	January 17, 2018

Clients Invite to Discover and Deep-Dive

From your Advisor Dashboard, locate the name of your prospect from the PROSPECTS: Discover Activity panel; move over to the “Next Step” column and click on **START DEEP-DIVE ANALYSIS**

This will open the invitation screen for Unlock: Deep-Dive Analysis

Start Deep-Dive Analysis

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Start Deep-Dive Analysis

Use this form to start Corevalue Deep-Dive Analysis.
Select the radio button below to choose between the following two options:

1. Send your client an email invitation to register and start Deep-Dive Analysis on their computer
2. Register for your client and complete Deep-Dive Analysis yourself. If you select this second option, your client will not receive any notifications and they will not have access to their account until you give them the password you assign to the account.

In both cases, you will be able to monitor progress from your dashboard.

Client Email	<input type="text" value="email@email.com"/>
Client First Name	<input type="text" value="Harrison"/>
Client Last Name	<input type="text" value="Ford"/>

1. Send client an email invitation. Client registers and completes Deep-Dive Analysis.

2. Register for your client. Complete Deep-Dive Analysis on this computer.

Make sure to select option #2 **Register for your client.** This option will let you set a password and register the account on behalf of your client.

Register for your client

Welcome to CoreValue Unlock Deep-Dive Analysis

Congratulations! You've completed Discover. Now let's dig deeper.

CoreValue Unlock Deep-Dive Analysis is a three-step process:

Step 1. Register
Register your email address and set up a password to allow secure access to your account. Once you have created your password, you can return to mycorevalue.com at anytime and pick up where you left off.

Step 2. Unlock: Deep Dive Analysis
Answer additional comprehensive questions for each of the 18 Value Drivers to dig deeper and refine your Discover results.
Step 2 takes approximately 90 minutes to complete.

Step 3. Unlock: Executable Growth Plan
In this third level, we'll provide a reports, suggested tasks, and analysis tools which include:

- Reports summarizing your CoreValue Rating, Enterprise Value, Value Gap, and Red Flags.
- Suggested actions you can take designed to maximize your operational excellence, market position, and business value.
- A driver Workbook for revising your previous answers and digging deeper with additional questions.
- A file Vault for storing and organizing documents that substantiate your business's value.
- A client Dashboard for managing your workbook and monitoring changes as you improve your assessment.

Step 3 is an ongoing process. You can return at any time to review your data, refine your responses, and track your progress.

First Name* ✓

Last Name* ✓

Email* ✓

Email Confirmation* ✓
Must match email address above. Your email address is your user name. No confirmation email is sent to this address unless you change the address we have provided here.

Password* ✓
Minimum of 8 characters, must include at least one lowercase letter, one uppercase letter, and one digit

Password confirmation* ✓
Must match password above

DISCLAIMER: CoreValue® Enterprise Value is not a formal financial valuation and should not be used as such. We do not sell, trade, or otherwise transfer to outside parties your personally identifiable information. Please refer to our privacy policy and terms of service for details.

This step is important:

Copy and paste the existing email into the 'email confirmation' box. **Do NOT change the email address on this page.** Doing so will trigger a new outbound email sent to that address requesting verification and initiating a new client account. Your ability to control the assessment will stop if you input a different email here.

Next, select a password for your client account. **WRITE IT DOWN** – there is no way to retrieve this pw without your client's assistance if you forget.

Confirm the password to access the **CONTINUE** button and start Unlock.

Note that each field requires a check mark indicating it's valid before you can select 'continue' to Unlock

Begin the Unlock Deep-Dive Analysis

Resume Assessment

Blue menu bar indicates you are using client-side of CoreValue. "My account" is associated with your client.

My Account

Fundamentals Growth Market Size Market Share Revenue Barriers Differentiation Brand Margin Customers

Company Financial Marketing Operations Satisfaction Management HR Legal Innovation

Growth

Goal: Your company has a history of consistent growth greater than its competitors, coupled with projected, future revenue growth above the market's rate.

Score: You originally scored Growth as 7.0. We'll refine this score by evaluating each indicator in turn.

Growth has 3 indicators:

- Company Growth
- Industry Growth
- Customer Advantage

Unlock Deep-Dive Analysis : 0% complete

Remember, you are now using the system **as a client**, **not as an advisor**.

- The application automatically logs you out of your account and initiates a new session using your client's user credentials (email and password).
- This is how you restrict client access to the results – until you demonstrate how to log in at mycorevalue.com, your client has zero access to the system and any reports, scores, tasks, etc.

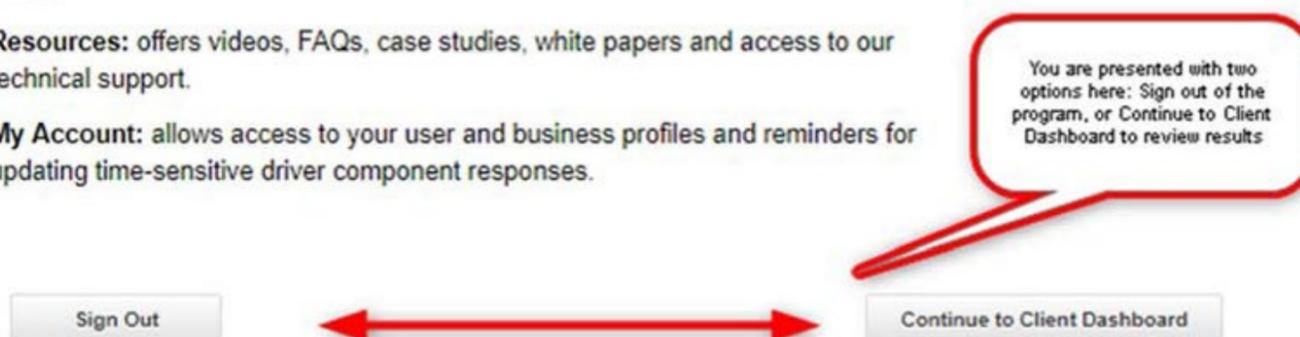
End of Unlock Deep-Dive Analysis

Proceed through the Unlock as normal. When you have completed all 78 Deep-Dive questions, you will be presented with the following transition screen. Here you have two options – log out to end the session or demonstrate the client dashboard and share some preliminary results (Reports).

Congratulations! You have arrived at Unlock: Executable Growth Plan

The next page you see will be your client dashboard - a control center for growing business value. The new menu bar you see at the top of this page is packed with features you will want to explore:

- **Reports:** summarizes your CoreValue Rating, Enterprise Value, Value Gap, Progress and Red Flags.
- **Projections:** allows you to create growth scenarios to project your business value into the future.
- **Workbook:** offers direct access to your entire assessment survey. You can revise your previous answers or dig deeper with additional questions.
- **Tasks:** suggests actions you can take designed to maximize your operational excellence, market position, and business value.
- **Vault:** allows you to store and organize documents that substantiate your business's value.
- **Resources:** offers videos, FAQs, case studies, white papers and access to our technical support.
- **My Account:** allows access to your user and business profiles and reminders for updating time-sensitive driver component responses.



If you want to stop here and continue later, click this button to sign out.
You can return to your CoreValue dashboard at any time by signing in to www.mycorevalue.com with your email address and password.

Want to get started? Continue on to the client dashboard.

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Access the Client Dashboard

- If you continue to the Client Dashboard, you can then access the standard series of reports detailing your client's Unlock results.
- While you may not be ready to turn over full access to your client at this time, in some cases it can be useful to share the OVERVIEW, COREVALUE RATING, and VALUE GAP ANALYSIS reports.
- It may also be helpful to give your client a preview of the dashboard, demonstrating this valuable feature that's a part of a long-term engagement with your firm.

1 Drop-down list of standard reports, including an explanation of what each report indicates for your client

2 BASELINE results: these are the ongoing KPIs for the business

3 Show your client that you can provide them with exceptional service by utilizing a tool to keep them focused and engaged on building a stronger company

4 Tell your clients that you can manage each step of the process and communicate the specific tasks via the convenience of a dashboard interface

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More Info

CoreValue® Rating Change	Enterprise Value \$Change	Enterprise Value %Change	Value Gap %Closed
unchanged	-\$0.00	-0%	0%

CoreValue® Rating: 52
Enterprise Value: \$4,700,000
Potential Value: \$7,420,000
Value Gap: \$2,710,000

Growth Plan : 0% complete

Investment Rating: C+

Reminders Review/Revise

Red Flags

Active Tasks: You have no Active Tasks. Show All Suggested Tasks