CoreValue
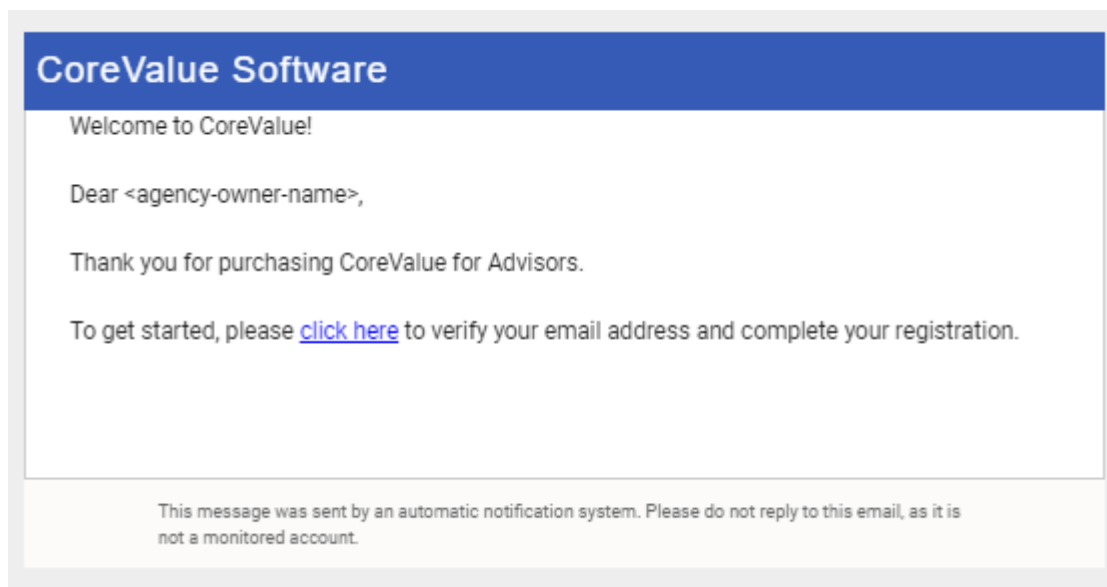## ADVISOR SOFTWARE

Welcome to CoreValue

We appreciate your business and want to ensure you experience the full benefit of becoming a CoreValue advisor. Follow the steps in this guide to get up and running today.

Step 1 – Establish Your User Credentials

CoreValue will send you a confirmation email with a link to register with us. This message will come from *notifications@corevaluesoftware.com* and will look similar to this:

CoreValue Software

Welcome to CoreValue!

Dear <agency-owner-name>,

Thank you for purchasing CoreValue for Advisors.

To get started, please click here to verify your email address and complete your registration.

This message was sent by an automatic notification system. Please do not reply to this email, as it is not a monitored account.

Begin by opening this email and select the "click here" link to establish your user credentials (login and password) and start using CoreValue Advisor Software.

This step opens your Agency Account. *A CoreValue "Agency" identifies your firm's license and related features according to your purchase.*

Note: If you do not see this invitation email in your inbox after purchase, check your spam folder. Some email security programs may filter out our message.

Understanding Your User Roles:

Your CoreValue license includes two (2) ADVISOR ROLES. The first is a **CoreValue Advisor/Administrator.** This role is in your own Agency, branded with your company logo, where you work with prospects and clients.
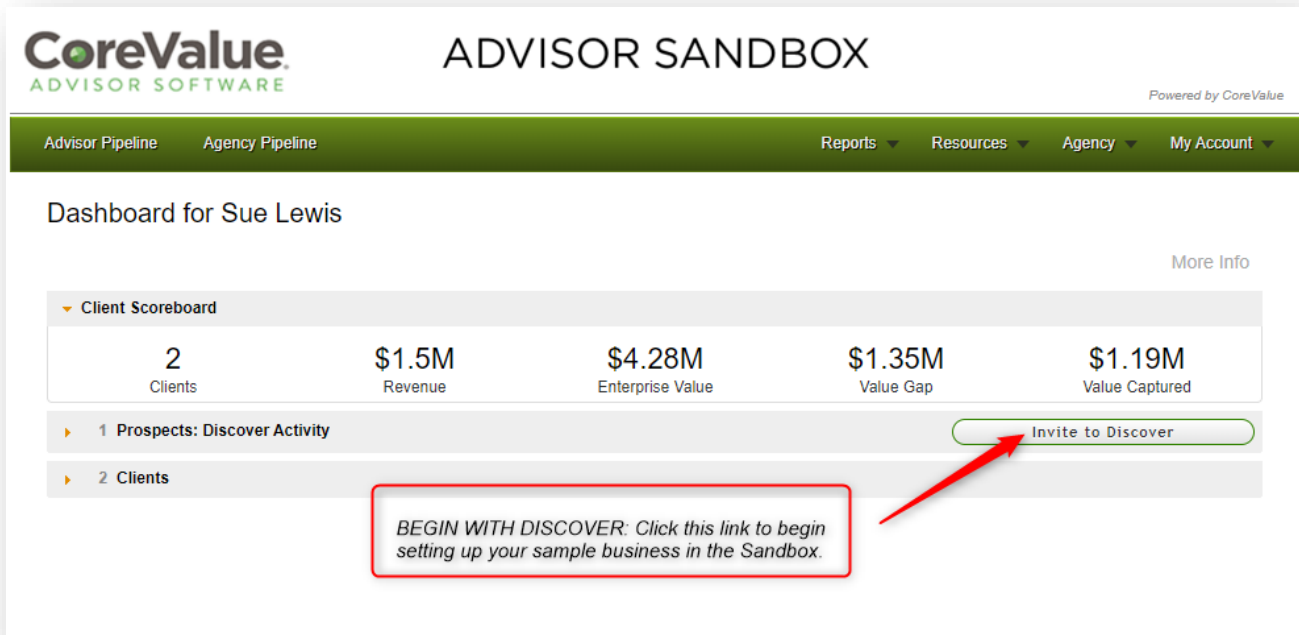
The second role is an ADVISOR in your **Sandbox** account, or practice area. Your Sandbox Advisor account is a duplicate dashboard you can use to learn the software, run practice Discovers or Deep-Dives and explore the tasks, client workbook and reports, all in a demo environment.

You will be able to toggle between your (2) roles directly from the user dashboard:

Powered by CoreValue

Resources ▼   Agency ▼   My Account ▼

👤 **Michael Scott**
Elite Advisor

⚙ User Profile
⏻ Sign Out

Other Roles

👤 Advisor Sandbox
Elite Advisor

Current login – as Advisor

Other Roles will identify additional roles you can use while in CoreValue

Your SANDBOX account (practice area) provides you with full access to CoreValue's assessment and reporting tools – Discover, Unlock Deep-Dive Analysis and Executable Growth Plan.

Tip!
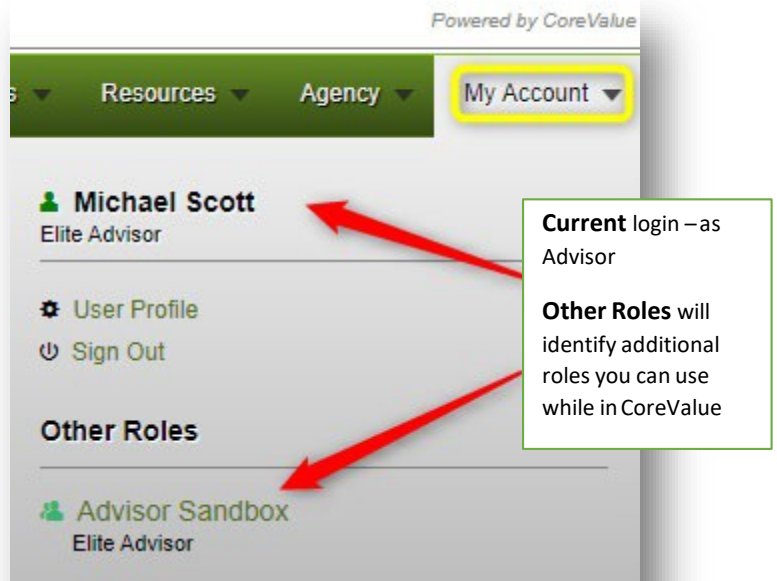
*We recommend using the Sandbox for **setting up a fictitious business** and acting as that company's advisor. This is a fantastic way to learn the CoreValue methodology and familiarize yourself with the value driver questions, answers, possible scores, or even to provide a prospective customer with a demonstration to help them understand the benefits of working with your firm.*

CoreValue. ADVISOR SOFTWARE   ADVISOR SANDBOX

Powered by CoreValue

Advisor Pipeline   Agency Pipeline   Reports ▼   Resources ▼   Agency ▼   My Account ▼

Dashboard for Sue Lewis

More Info

▼ Client Scoreboard

| 2 | $1.5M | $4.28M | $1.35M | $1.19M |
| Clients | Revenue | Enterprise Value | Value Gap | Value Captured |

▸ 1 Prospects: Discover Activity   (Invite to Discover)

▸ 2 Clients

BEGIN WITH DISCOVER: Click this link to begin setting up your sample business in the Sandbox.

IMPORTANT: Set up your Sandbox client today and begin walking through the CoreValue process: Discover followed by a Deep-Dive Analysis. You'll need a completed Deep-Dive Analysis to access additional features, like the Client Workbook & Tasks, and sample reports in the software.

Step 2 - Learn and Explore

TRAINING AND SUPPORT RESOURCES:

You can access a variety of training and informational **Resources** directly from the advisor dashboard. Just click "Support Center" to access the Help Center's Knowledgebase, where you'll find **videos, how-to's and marketing resources** including business development support documents.

To view the Help Center 24/7 just click this link:
https://www.corevalueforadvisors.com/knowledge
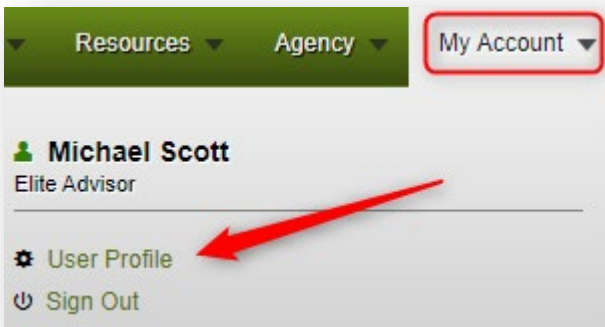
USER PROFILE

Selecting "User Profile" from the MY ACCOUNT menu will bring up your user settings. Here, you can edit your name, title, enter a personal advisor 'blurb' (visible to your clients only) and select event notifications

NOTIFICATION PREFERENCES

Establish **Notification preferences** to be sure you are notified of specific client activities.

Each time a client logs one of these activities, you will receive a message from notifications@corevaluesoftware.com indicating which client has logged this activity within your Agency account.

As you use CoreValue with multiple clients, you will get a better feel for how these notifications work day-to-day. Remember that you can adjust these notifications at any time to meet your workflow needs.

Step 3 – Practice and Master

Use your **SANDBOX** Advisor role to learn more about the **Value Driver questions and components**. Once the Deep-Dive Analysis has been completed, return to your Advisor Dashboard and open the **Workbook** to familiarize yourself with each driver and its subcomponents. Consult the Suggested Task list and create a task for your 'client' to complete. Make changes to driver scores by selecting different answers to understand how each *new or revised answer impacts a company's Enterprise Value, CoreValue Rating* and more.
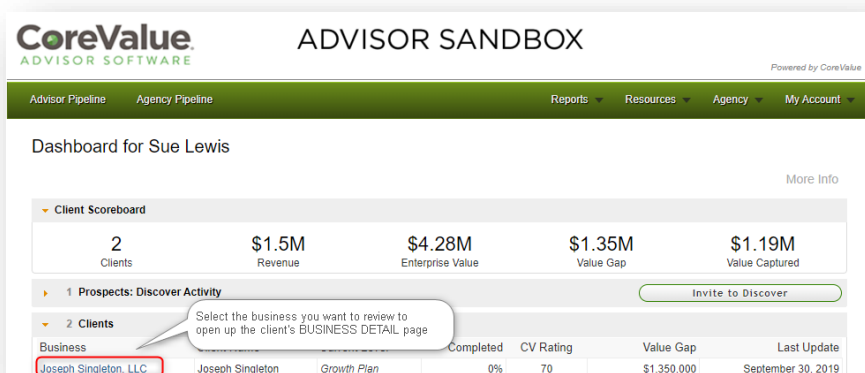
VIEW RESULTS OF THE Deep-Dive Analysis:
From the Advisor Pipeline, select the name of the client's business by clicking on it.

This will open the BUSINESS DETAIL page for that company, where you can delve into the specific results of the Deep-Dive Analysis and create reports.

BUSINESS REVIEW
Here you can open the Client Workbook. The workbook lists all the driver questions and possible answers to each. In addition, you'll have a tally of all questions currently answered and the current score (0-10) for each of the 18 drivers.

The Tasks are generated based on both *driver structure* and *how the client answered each question.* Tasks can be used 'as-is' or you can create your own custom tasks for each driver.

The Vault provides your clients with a repository for any documents that can offer additional details or backup to help substantiate the answers provided.

Reports-these are single-page reports on CoreValue Rating (by driver) and Value Gap analysis (by driver) along with an Overview and access to Driver Detail (scores and answers) for each Deep-Dive Analysis.

The Projections interface allows you to run 'What if?' scenarios to understand the impact of changes in margin, growth rates, enterprise value and CoreValue rating on the time frame for achieving the projected Potential Value of the company.

YOU NEED TO COMPLETE YOUR PRACTICE COMPANY DEEP-DIVE ANALYSIS IN ORDER TO OPEN UP THE CLIENT WORKBOOK, TASKS AND VAULT.

Step 4 – Dive in and Have Fun!

BEST PRACTICES:

Encourage your clients and prospects to be candid when answering the questions; ask them to rely on their day-to-day knowledge of their business to choose an appropriate answer. Remember, there are no 'right' or 'wrong' answers; just data.

Let the client read each question and the list of possible answers out loud. Listen carefully and be observant of body language. Often, you'll find the most rewarding aspect of using CoreValue is not the questions or the owners' answers, but the conversations you have, and the insights uncovered while taking them through this process.

Ask a colleague to assist with the Deep-Dive meeting by taking notes. This frees you up to focus your attention on the client, while still gathering any supplemental information that can be used in your analysis and recommendations or action plans.

At the conclusion of a Deep-Dive Analysis, encourage your client to take a step back and reflect. What did they learn about their business, themselves, their team? Schedule a follow-up session to review the results, allowing you ample time between meetings to review the outputs, suggested tasks and workbook scores for each client. Be sure to frame your analysis within the context of the owner's stated goals and objectives; this is how you tie it all together.

Tip!

**USE THIS IMPLEMENTATION CHECKLIST TO ENSURE A SUCCESSFUL QUICK START**

❑ Received initial email notification and/or purchase confirmation from CoreValue

❑ Set up my user account credentials (login & password)

❑ Logged into my Advisor Account

❑ Accessed the Sandbox (training) Agency

❑ Run a Discover & Deep-Dive Analysis in the Sandbox

❑ Scheduled my Orientation

❑ Reviewed the self-paced training guide

❑ Set up my Email Notification Preferences

❑ Run my first Prospect through CoreValue Discover