

Case Study

Adding Value to Clients and Realizing ROI with BizEquity

See how one advisor is able to bridge the gap between what his clients need and what they are willing to spend using BizEquity's powerful valuation platform.

The Challenge

For over forty years Hough Johnson III, CLU®, ChFC®, AEP®, CEPA®, has helped people make their financial visions a reality. Through that experience, Hough discovered that nearly all business owners face the same problem: they rely on the sale of their business for their retirement, yet they do not know its value. He sought to solve that problem.

However, **traditional business valuation can be costly in both time and money**. And many business owners are reluctant to spend the thousands of dollars and many hours it takes to run one.

The Solution

That is where BizEquity comes in.

To bridge the gap between a costly traditional valuation and what business owners are willing to spend, Hough enlisted the BizEquity Platform, which enables him to quickly generate professional, yet economical valuations for his business owner clients.

With it, he can offer on demand business valuations to clients and prospects at a fraction of the cost and in a fraction of the time.

“If you work with business owners, how much can you really help if you don't know what the business is worth?”

The Results

1. Value Added Services

When coupled with Hough's expertise, the platform enables him to better engage prospects and improve client relationships.

2. Improved Business Advice

Using BizEquity's industry-specific KPIs, Hough is able to highlight areas of improvement for business growth and educate owners on all the ways they can grow their valuation.

3. Reduced Complexity

Even with more advanced business needs, BizEquity helps Hough guide his clients correctly, helping with specific needs such as accounting for minority interest in helping with a buyout.