



Ready to Take Your Advisory Practice to New Heights?

This turnkey technology-enhanced business advisory system has a record of successfully helping advisory firms expand their profit and value growth services.

This program includes tools, software, a certification, playbooks, marketing elements, and implementation support.

You get everything you need to successfully and confidently deliver client wins.

www.growth-drive.com

(843)-284-7878

support@growth-drive.com

Ready to Unlock Growth?

Expand Your Advisory Practice with the Growth-Drive Playbook

Business Owners and CEOs are actively seeking to increase cash flow, reduce risk, and prepare for a successful M&A transaction. **Is your firm able to provide the help they are seeking? The Growth-Drive system is your gateway to building a future-ready advisory practice, positioning you as an indispensable strategic advisor.** Growth-Drive is backed by real-world results across thousands of advisory engagements. This proven system is trusted by Business Advisors, Wealth Advisors, CPAs, Fractional CFOs, M&A Pros and PEG Operators nationwide.

Whats Included

- ☐ **Strategic Tools and Frameworks** - Generate higher-value engagements.
- ☐ **C3D Certification** - Master the skills for creating predictable profits, sustainable growth, and transferable business value.
- ☐ **CLARITY Software** - Diagnose gaps, forecast value, and guide client strategy.
- ☐ **Proven Playbooks** - Pre-built scripts, templates, and engagement roadmaps.
- ☐ **CEO-Level Reports** - Elevate your firm with insights clients act on.
- ☐ **Implementation Strategy** - Comprehensive plans ready to roll out to create a scalable advisory practice.
- ☐ **Ongoing Support** - Support when you need it. Best practices, how-tos, and study groups.

Your Free Growth-Drive Kit Includes:

- ☐ **Sample Deliverables**
- ☐ **C3D Certification Overview**
- ☐ **CLARITY Software Snapshot**

Join Us Live: Growth- Drive Summit October 6-8 Charleston, SC

Register: www.Growth-Drive.com/summit-2025



Example Meeting Script: Profit & Value Growth Planning

Facilitated by a Growth-Drive-powered Advisor using provided knowledge, technology and tools. Scripts may be used verbatim or adapted to the individual's style.

Duration: 60-90 Minutes

Objectives

- ☐ Educate Business owners on strategic intent and strategic capacity.
- ☐ Demonstrate how to increase profits and business value using the Growth-Drive methodology.
- ☐ Outline actionable steps to improve leadership, revenue predictability, and operational efficiency.
- ☐ Briefly explore how improving strategic capacity can position the business for future M&A opportunities if desired.

Meeting Agenda

1. Introduction & Meeting Purpose (5 Min)
2. Understanding Business Growth & Profit Maximization (10 Min)
3. The Three Dimensions of Business Growth (15 Min)
4. Assessing Strategic Capacity & Business Value (15 Min)
5. Key Steps for Profit & Value Growth (20 Min)
6. Preparing for M&A (Optional Brief Discussion (10 Min)
7. Q&A and Next Steps (10-20 Min)

Meeting Script Example

Understanding Business Growth & Profit Maximization (10 Min)

*"A profitable business isn't just about revenue-it's about maximizing efficiency and value while minimizing risk. What you really want is a business that generates **predictable profits** and grows in a **scalable** way."*

"This starts with what we call Strategic Capacity: your company's ability to drive profits, scale its operations, and become more valuable over time-whether you're staying in the business long-term or thinking about future opportunities."

"Today, our focus will be on building this capacity so that you can see better returns in the short term and throughout the next several years."

The C3D-Certified Growth-Driving Advisor

By Growth-Drive

If you're like many successful Business Advisors and Personal Advisors, you value having the knowledge and confidence that supports successful engagements. Whatever your role, knowing why changes are made, what needs to be done and how elevates your game.

Why Earn the C3D Certification?

*As part of expanding your practice, you and your team can become C3D Certified Advisors. The C3D certification is an online, self paced program **developed by Growth-Drive**. It equips CPAs, business advisors, and financial professionals with a structured, proven methodology to guide privately held businesses toward scalable profits and strong enterprise value. In today's environment, clients want advisors who can drive measurable results. Should this be you?*

As a C3D professional, you'll have everything you need to shift your client conversations from reactive problem solving to proactive growth strategy-becoming their indispensable partner in building profitable, best in-class businesses.

What's Included?

- ☐ **Growth-Drive Methodology Training** - Learn the three dimensions of business growth.
- ☐ **Strategic Capacity Assessment System** - Access proprietary tools and reporting frameworks to assess, benchmark, and improve client operations and business value.
- ☐ **Execution Frameworks** - Learn how to confidently use prebuilt strategic conversation guides, scorecards, and reporting structures, creating high impact client sessions.
- ☐ **Certification Credential & Community** - Display your C3D designation with confidence and join a collaborative network of vetted professionals including exit planning wealth advisors, growth advisors, and more.

After completing this certification you will be able to:

Confidently guide business clients through structured growth conversations, educate them about growing enterprise value, and deliver practical strategies that increase profit & value. You are the expert at creating best-in-class businesses positioned for long-term success. Can you imagine being indispensable to growing profits, operational efficiency and M&A prep? Your C3D gets you there.

Ready to move from discussing the same-old to shaping the future? Join the C3D community and build a thriving advisory business driven by expanding your reach & impact and delivering client wins. Register: www.Growth-Drive.com/C3D

CLARITY[™]

Strategic Capacity & Business Value Report

samples

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BUSINESS METRICS



Prepared for:	Diane Ridge
Business Name:	Ridge Specialty Tooling DEMO
Industry:	Manufacturing (31-33)
Gross Revenue, Trailing 12 Months:	\$ 54,000,000
Profit, Trailing 12 Months:	\$ 5,100,000
Headcount	270
Email:	george+rstooling@growth-drive.com
Mobile Phone:	

Your selections are highlighted:

Goals:

Stabilize Cashflow

Grow Revenues

Prepare for Sale

Make Business Easier to Run

#1 Priority:

Stabilize Cashflow

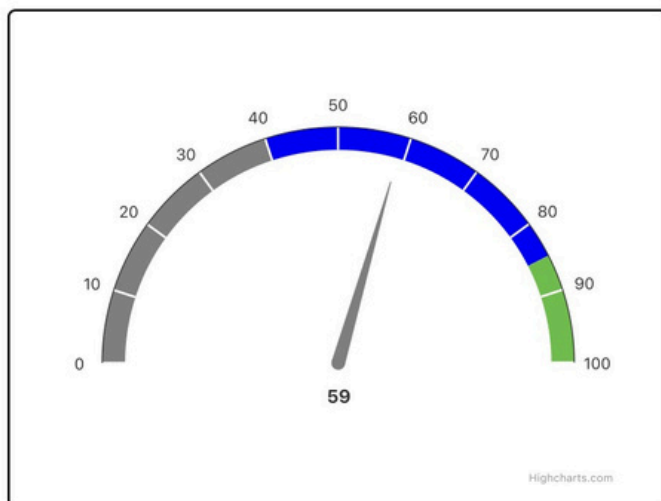
Grow Revenues

Prepare for Sale

Make Business Easier to Run

Your top bottleneck:

I don't feel like I am getting the most out of my team, the business is stuck and nothing we have tried is making a real difference. We need to grow.



SCORE
59

YOUR STRATEGIC CAPACITY SCORE

Your Strategic Capacity Score is out of a possible 100. Scoring percentiles:

- 54 is the 50th Percentile (average of all businesses)
- 70 is the 86th Percentile (stand-out businesses)
- 85 is the 96th Percentile (best-in-class businesses)

Your score is a comprehensive measure of your business's ability to outperform competitors in delivering growing profits and maximizing transferable value.

This score is composed of two key components: Growth Capacity, which assesses your business's ability to predictably grow profits and cash flow, and Value Capacity, which evaluates your readiness for M&A transactions. If your business scores 85 or above it's considered best-in-class.

High-performing businesses typically excel in the three dimensions of business growth (see page 7), out-competing on positive cash flow and sustainable growth, potentially earning top multiples in an M&A or similar transaction.

Your score provides a benchmark for comparing your business's performance against best-in-class operations in your industry. Achieving defined growth-driving objectives is a path to making profit and value growth actionable.

TOP CEO GOALS POWER OUR METHODOLOGY

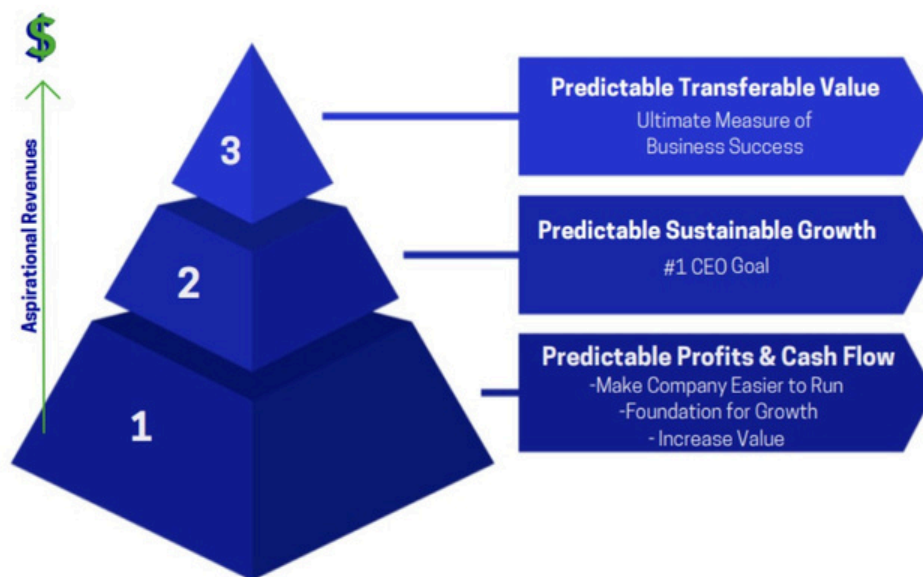
The methodology supporting this report is proven to help CEOs reach their strategic goals.

How do CEOs like you define their strategic intent? Data from interviews with over 50,000 Middle Market and Pre-Middle Market CEOs reveals that:

- 62% intend to grow
- 21% intend for their business to be easier to run
- 17% are preparing to sell, but 83% of the time their business value is insufficient

Your Stated Strategic Intent: Grow Revenues

3 DIMENSIONS OF BUSINESS GROWTH



The '3 Dimensions of Business Growth' methodology serves each CEO intent. The term 'dimensions' recognizes that a business can move in all three at the same time.

DID YOU KNOW THERE ARE THREE DIMENSIONS OF BUSINESS GROWTH?

The 3 Dimensions of Business Growth are Predictable Profits & Cash Flow, Predictable Sustainable Growth, and Predictable Transferable Equity Value, which collectively ensure sustainable business expansion and maximize transferable (monetizable) value.

Dimension 1: Predictable Profits and Cash Flow

Making the business easier to run: This dimension focuses on generating consistent and reliable profits. It emphasizes strong financial management practices, such as maintaining robust margins, tracking and managing cash flow effectively, and implementing scalable sales processes. Companies that excel in this area can predict and stabilize their revenue streams, reducing financial volatility and ensuring long-term sustainability. Strong performance in **Dimension 1 creates the launchpad for sustainable growth.**

Dimension 2: Predictable Sustainable Growth

Revenue Growth is the #1 CEO goal. Delivering this goal calls for strategies and tactical execution aimed at driving steady and scalable revenue growth. Key aspects include developing unique products or services, implementing effective marketing strategies, and expanding market reach. Businesses need to invest in innovation, continuously improving their offerings and adapting to market demands, thereby staying competitive. By focusing on predictable revenue growth, companies can create a reliable pipeline of income, supported by strategic investments of time and treasure based on long-term planning. Achieving the objectives in **Dimension 2 is the predicate for maximized transferable value.**

Dimension 3: Predictable Transferable Equity Value

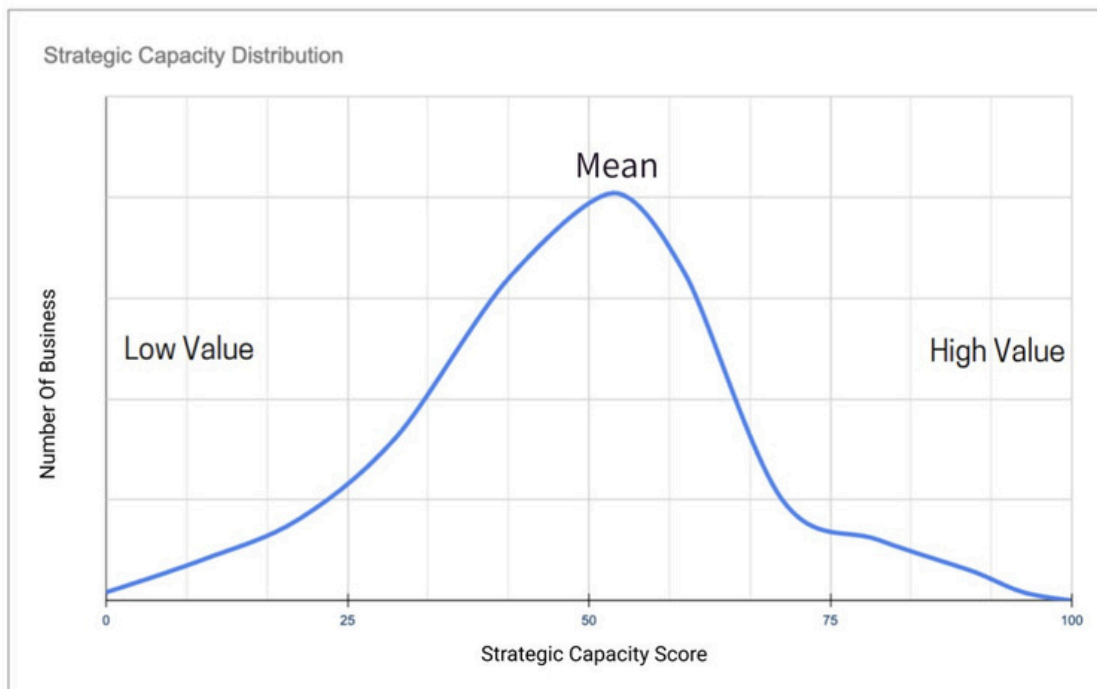
Maximized value is the ultimate measure of business success This dimension focuses on objectives that create a purposeful link between revenues and value, ensuring that the business can earn a top multiple of earnings in an M&A or similar transaction. Dimensions 1 & 2 build capacity for Dimension 3, increasing the company's attractiveness to potential lenders and acquirers and thereby increasing the ability to command a high valuation.

SCORING A BUSINESS IN THE 3 DIMENSIONS OF BUSINESS GROWTH

Scoring:

1. Based on your answers, our analysis calculates a score for your business in each of the three dimensions of business growth; these are combined to calculate your Strategic Capacity score
2. Strategic Capacity >84 suggests the business is a Best-in-Class competitor A score of 85 is the 96th percentile of the market
3. Businesses scoring >84 are proven most likely to generate predictable profits, sustainable growth, and maximized transferable value
4. Market dispersion of Strategic Capacity is logarithmic. The mean score is 54. A score of 70 is an exponential improvement from 54: while 70 a 1.26X numerical improvement, it is a 4X improvement in Strategic Capacity

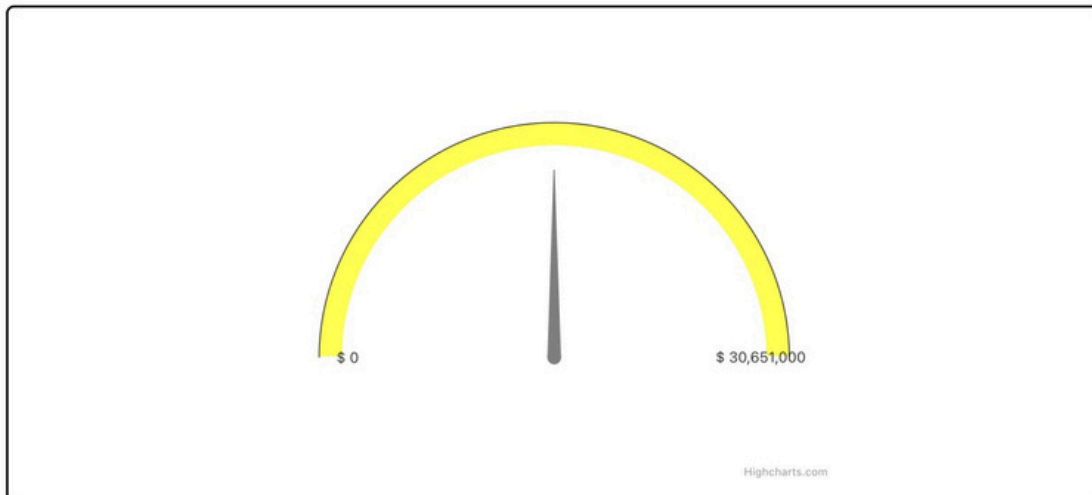
Bottom line: executing a re-design of a business so that it can demonstrate high Strategic Capacity requires long-term commitment to relentless execution.



Your Strategic Capacity: 59

CALCULATION OF BUSINESS VALUE

STRATEGIC CAPACITY AND POTENTIAL BUSINESS VALUE



TRANSFERABLE BUSINESS VALUE

This business is calculated to represent:

- **Transferable Value of \$ 18,084,090** -this correlates closely with expected post-due diligence value in an M&A or similar transaction (value net of risk discounts)
- **Value at High Strategic Capacity: \$ 30,651,000**
- **The Value Gap is \$ 12,566,910** - this value gap may be recaptured by increasing Strategic Capacity, and represents the ROI from taking action; although revenues tend to increase in train with Strategic Capacity, capturing the value gap does not depend on increased revenue. **The Value Gap is your potential ROI from taking action.**

The portion of total value that can be monetized in an M&A or similar transaction is driven by measured risks to future profits and growth. **The private capital markets are tuned to pay top price for businesses that are highly likely to deliver sustainably growing profits and cash - that have the capacity to grow.** Threats to this capacity are rewarded by discounts to price.

Strategic Capacity drives growth and value.

This is a 'calculation of value' as the term is generally defined by the NACVA, AICPA and ASA. This report is not an opinion of value nor should it be used as such. This calculation of value is intended for discussion and planning purposes only. Final transferable business value is determined by what a willing buyer would pay considering a variety of factors including the results of due diligence, the market and economic conditions. This calculation of value is provided for your use under the terms and conditions detailed at <https://www.growth-drive.com/terms-of-service>.



Ready to dramatically expand your reach and relevance with CEOs and business owners?

The first step is yours. Schedule your free consultation.

Call (843) 284-7878 or email sales@growth-drive.com

Your success is important to us: does working together makes sense?

www.growth-drive.com