



## Halvorson Companies Discover Report

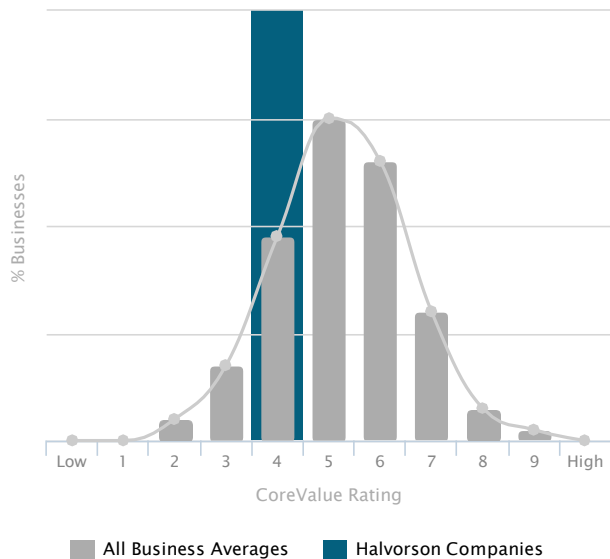
Name: Abe Halvorson  
 Industry: Manufacturing  
 Objective: Sustainable Growth  
 Completed: Oct 27, 2017 09:31 AM

Potential Business Value  
**\$12,778,000**

Value Gap  
**\$2.46M - \$4.57M**

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



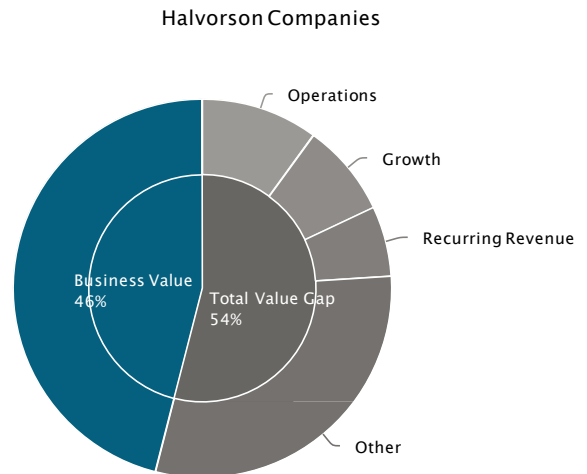
#### CoreValue Business Rating

Your CoreValue Rating is an indication of how well your business currently aligns with best practices and standards.

This chart compares your CoreValue score to the CoreValue score of other businesses.

*The better the Rating, the better the alignment – and the greater potential to achieve business objectives.*

### Growth & Value Opportunity



#### Value Gap

Your value gap represents the difference between what your business is worth today (Business Value) and how much it could be worth (Potential Value). In other words, how many dollars you are leaving on the table due to operation and market weaknesses.

The full circle shown in this chart represents your potential business value. The data slices show how much is locked up in value gap.

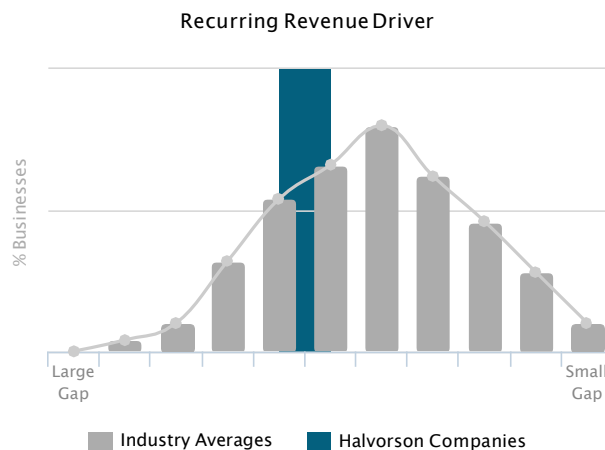
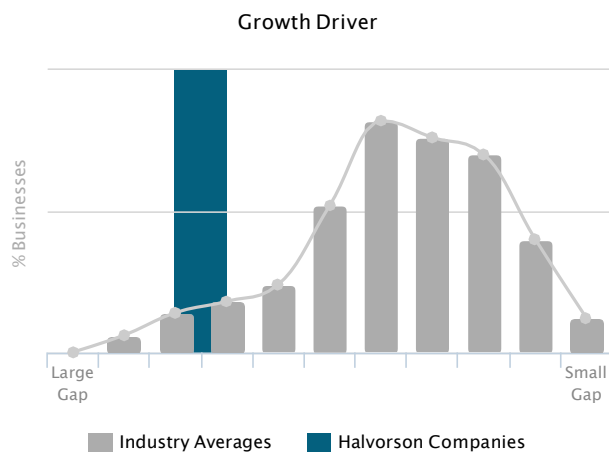
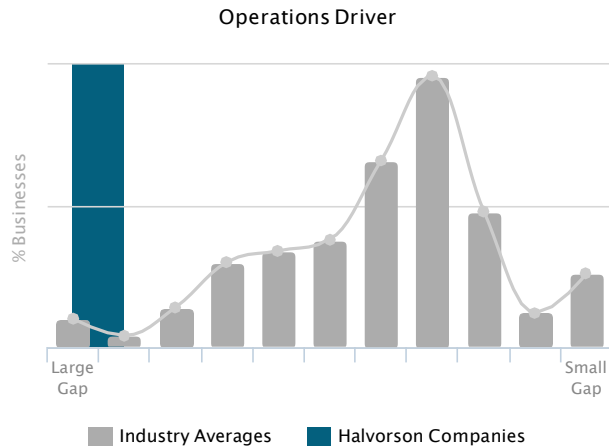
*The larger this gap, the less sustainable, profitable and transferable the business, and the harder it will be to successfully accomplish your objectives.*

## How Does Your Business Compare?

### Value Gap of Critical Drivers

These charts compare your growth opportunities with similar drivers in other businesses within your industry.

*These three drivers are causing you the most pain. For the biggest "bang for your buck", focus on improving these drivers first.*



## Potential Red Flags

### Operations

#### 3 Potential Red Flags



*To achieve any objectives, the company must improve how well it makes good on promises to the market.*

### Company Overview

#### 3 Potential Red Flags



*Make it easier for any stakeholder (present or future) to gain a holistic understanding of the company.*

### Legal

#### 1 Potential Red Flag



*It's essential the company gets its legal house in order and follow all best practices.*

### Potential Red Flags

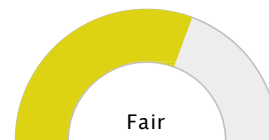
Red Flags are important issues or 'watch outs' that can negate all the value of your business and compromise performance.

Here we list any drivers that we found are being compromised by red flag issues.

*If an owner is trying to raise capital, hit growth targets, attract stellar employees or a buyer, these are the types of issues that will bubble up during due diligence and can compromise achieving one's business objectives.*

## Summary

Your Overall Score



### Opportunities ahead...

The overall value status of your company is in fair condition. This is an indication of the strength of your business as an engine, its ability to perform, generate future revenue and profit, and meet your objectives. This status means you may encounter challenges meeting some of your personal and business objectives.

By focusing on and fixing those few Drivers creating most of the Value Gap, you will create the most value, drive the strongest growth, and most likely, *make running the business more exiting and fun.*

### Growing Your Business

Choosing to grow your business requires clear identification of roadblocks on the path to sustainable value. Our analysis, clear reporting, and actionable tasks make strategic planning and growth transparent, simple, and actionable.

Prepare to face the challenges of business growth by maintaining your positive attributes while focusing on closing your operational gaps.

### How to Proceed

Since this is a high-level assessment, you'll need to dig deeper into your business to identify specific areas for improvements.



## Your Discover Responses

<u>Driver</u>	<u>Goal</u>	<u>Your Response</u>
<b>Growth</b>	Your company has a history of consistent growth greater than its competitors, coupled with projected, future revenue growth above the market's rate.	<i>Business is slowing down.</i>
<b>Market Size</b>	The market supports significant growth of the business.	<i>Our market is very large.</i>
<b>Market Share</b>	Your company owns the highest percentage of the available market relative to its competitors.	<i>We're practically invisible.</i>
<b>Revenue</b>	Your company can rely on a portion of future revenue from contractually committed customers.	<i>We have only a few contracts or other reasons why we're confident in future revenue.</i>
<b>Barriers</b>	There are significant obstacles facing a new entrant into your company's market.	<i>It's pretty tough, but doable.</i>
<b>Differentiation</b>	Your company has a product/service with unique characteristics that provide a competitive advantage.	<i>We look like everyone else.</i>
<b>Brand</b>	Your company has a recognizable brand that reinforces the business' presence in the marketplace and supports the company's objectives.	<i>Our brand isn't very strong.</i>
<b>Margin</b>	Your company enjoys gross and net margins greater than the industry norm.	<i>Our margins are solid, like everyone else's.</i>
<b>Customers</b>	Your company has a well-diversified customer base.	<i>We can lose a few customers and still be fine.</i>
<b>Company</b>	An outsider can easily obtain a holistic understanding of your company including your company's performance, practices, culture, discipline, and mission.	<i>It would be nearly impossible.</i>
<b>Financial</b>	All of your company's financial matters are in order and you follow best practices.	<i>We're pretty on top of our finances.</i>
<b>Marketing</b>	Your company can produce revenue in a proven and systematic way, ensuring the business is sustainable and not simply based on the efforts of individuals within the business today.	<i>If our key sales or marketing folks left, we would have some big problems.</i>
<b>Operations</b>	Your company has the ability to deliver on the sales promises made to the marketplace and to do it in a systematic and process-driven manner.	<i>We're pretty good.</i>
<b>Satisfaction</b>	Your company tracks and uses key measures to meet customer expectations at all levels.	<i>We have a pretty good idea most of the time.</i>
<b>Management</b>	Your company has a leadership team/individual in place to realize the company's vision and mission while helping the owner achieve his/her objectives.	<i>The company doesn't have any other employees besides the business owner.</i>
<b>HR</b>	Your company has the ability to find, develop, and retain quality individuals that enables success in all aspects of your business.	<i>We're pretty good.</i>
<b>Legal</b>	You have all legal matters in order, documented, and your company follows best practices.	<i>We could do a better job.</i>
<b>Innovation</b>	Your company understands that innovation is invaluable to creating an ongoing competitive advantage; it has a proven and systematic way to drive and capture innovation at all levels and encourages innovation in every area of the business.	<i>We don't put a lot of energy into new and unproven ideas.</i>