

Equifax Business Value Advisor

KEY BENEFITS

Capture and convert new small and mid-size business leads while re-engaging established client base with a dynamic new service

Help small businesses clearly and easily understand the estimated value of their company, and how to best protect it

Grow your business by proactively identifying gaps in coverage or the need for additional services

Differentiate your company in a competitive market with customized reports that include your logo and branding



Attract, Win, and Retain More Small and Mid-size Business Customers With Digital Business Valuation Reports

Small businesses represent a huge opportunity for the insurance and financial services industry. For example, it's estimated that nearly 40 percent of sole proprietors¹ do not carry small business commercial coverage, up to 50 percent of small businesses are underinsured² and many owners lack life insurance policies. Yet, for many advisors, it's difficult to begin the conversation when up to 98 percent of small businesses³ don't know the value of their own companies.

Equifax Business Value Advisor™, a solution powered by BizEquity® can help. As a robust online valuation tool, it can provide vital information to your prospects and customers about their small business, while also helping identify high-potential sales opportunities within your client base.

It is a highly specialized service that combines the industry's only patented online valuation system with market-leading Equifax data expertise to create a big data prospecting and risk management online service for insurers that can help with the following:

- Attract more small business owner clients
- Prospect smarter by identifying needs
- Better plan for proceeds from a business sale

Strengthen Customer Relationships By Helping Them Easily Understand Their Business Value

Traditional methods of business valuation are cumbersome and time-consuming, usually involving third-party resources with access to limited data sources and requiring up to four weeks of waiting for the final report. What's more, the report can easily cost thousands of dollars, which is why many small firms skip it.

EQUIFAX®

BIZ|EQUITY



With Business Value Advisor, the entire process is easier, faster and more cost-effective for you and your customers.

With Business Value Advisor, the entire process is easier, faster and more cost-effective for you and your customers due to the following:

- Easy online access to a digital valuation questionnaire
- Immediate results with a comprehensive, 29-page valuation report
- Better access to quality data from more than 30 data sources, updated in real-time

In addition, Business Value Advisor allows you to customize your valuation reports with your logos and branding to help you further differentiate your business, establish relationships with your prospects and provide cutting-edge insurance guidance.

With a completed valuation, you will have a detailed road map to an extensive range of sales opportunities as well as smarter prospecting since you can better understand a prospect's needs before an initial meeting. In fact, simply offering the actual business value report to existing clients allows you to provide a value-added service that may have been previously cost-prohibitive, while also helping proactively identify gaps in coverage or need for additional services.

Expand the Horizons For You, and Your Small Business Customers

Business Value Advisor gives you a dynamic tool to help capture new small business customers and re-engage with your existing client base. With it, you can better protect current business clients and become a preferred advisor that small business owners choose to help protect their business, their family and ultimately their future.

¹ U.S. Small Commercial Insurance Sector Ripe for Competition: McKinsey, March 2016, *Carrier Management*, <http://www.carriermanagement.com/news/2016/03/06/151794.htm>

² About Business Valuation, BizEquity, LLC, <https://www.bizequity.com/aboutvaluation>

³ What's Your Business Worth? How to Find Out, September 2016, *Business News Daily*, <http://www.businessnewsdaily.com/5998-find-business-worth.html>

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