

# client story

## BRADLEY PULVERIZER



snapshot

### Results after 24 months:

**Growth in Revenue: 9%**

**Growth in Gross Profit: 9%**

**ROI with Compass Point: 3**

#### Outcome:

- Transition plan developed and owner's Next Chapter envisioned: **Priceless**



FOR MORE RESULTS CLICK HERE:

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### Business Challenge:

A business owner of a niche industrial equipment manufacturing company faced a dilemma. The 100-plus-year-old global company had stalled revenues, lacked clarity in its growth plan and poor communications between its US and UK office. They were missing a proactive maintenance plan for existing customers, leaving relationships unsupported and revenue on the table. He employed a skilled, yet aging workforce whose valuable knowledge was not documented. To compound his efforts, there was no clear successor, as his next gen options were pursuing other interests and had no interest in joining the business.

### Owner Challenge:

- Wants business to transition to "Next Gen" whether within his family or another family
- Key employee retention
- Succession for aging workforce

### What Owner Wanted:

- The business legacy to continue
- Employees to keep their jobs
- Receiving a fair value for the business

### Results of our Six Pillars of your Family Business™ Framework:

- Developed a written three year strategic plan, broken down into quarterly priorities
- Aligned the leadership team which provided clarity and direction for them and the owner
- Implemented an ERP system to streamline and track production
- Updated buy/sell agreements
- Updated all estate documents
- Conducted a formal valuation that has identified areas the company needs to improve in order to reduce risk and improve value
- Improved collaboration and communication between the US and UK office
- Created a manual of key processes and procedures
- Developed proactive business development activities to better serve customers and find new opportunities
- Hired several new International Manufacturer's Representatives to support the inside sales team and expand global reach

### Build a business that can run without you.

Let's discuss how Compass Point can help you do just that.

[Click to setup a call](#) or [scan this QR Code](#) to learn more.



## SIX PILLARS OF YOUR FAMILY BUSINESS



### BUSINESS STRATEGY

- Planning for Agile Growth
- Core Values
- Rhythm & Benchmarking
- Value Acceleration



### GROWING LEADERS

- Who Then What
- Key Executive Development
- Team Alignment
- Company Culture



### TRANSITION

- Next Generation
- 8 Options of Transition
- Legacy Planning



### FAMILY DYNAMICS

- Prepare for the 5Ds
- 3 Circles Business System
- Family Handbook



### FINANCIAL GAP

- Financial Modeling for Owner
- Harvesting Income Now
- Lifestyle Expectations
- Manage Risk



### NEXT CHAPTER

- Define Your Vision
- Transition to vs Leaving from
- What's Your Runway

Successful Businesses. Aligned Ownership. Stronger Families.

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