

# client story BRADLEY PULVERIZER



snapshot

## Results after 24 months

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

Growth in revenue: 9%

Growth in profit: 9%

ROI on investment: **3X in 24 months**

### 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 the ValuePoint™ Process:

- 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

#### THE CHALLENGE TO FAMILY BUSINESS GROWTH

25.2 MILLION FAMILY FIRMS  
Source: U.S. Census Data 2017



Ready to build a business that can run without you?  
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### BUILD VALUE

- Strategic Planning | Scaling Up
- Value Acceleration
- Leadership Team Development
- Succession Planning
- Family Business Governance

### UNLOCK WEALTH

- Financial Modeling for the Owner
- Tax Buckets
- Lifestyle Expectations
- Harvest Income from the Business Now
- Manage Risk

### NEXT CHAPTER

- Prepare for the 5Ds
- Define Your Vision after the Business
- Transition To vs Leaving From
- Three Hurdles
- What's Your Runway

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