

FOCUS

Enterprises, Inc.

Investment Banking

12 VALUE DRIVERS: Self Assessment Scorecard

Develop Your Own Firm’s Profile Using This Self-Assessment

Use this scorecard to rate your firm (not yourself) on a 1 (low) to 10 (high) scale for each driver. Some sections won’t apply as much as others. Ratings generally should fall into the 3 to 8 range.

There is no overall score. But developing your own firm’s profile should help you gain insight into your firm’s areas of strength and of additional needs. Circle the appropriate number on each of the twelve VALUE DRIVERS and then connect the circles to create a visual profile of your firm.

	12 VALUE DRIVERS	1	2	3	4	5	6	7	8	9	10
1	Your Customer Base										
2	Recurring Revenue										
3	Product Integration										
4	Gross Margin Trends										
5	Intellectual Property										
6	Human Capital										
7	Management Tenure & Experience										
8	G & A Leverage										
9	Distribution Leverage										
10	History/Reputation										
11	Sales & Marketing Effectiveness										
12	Barriers to Competitive Entry										

Using Your Profile to Anticipate, Address, and Strengthen Areas of Concern Will Drive Your Firm’s Value Upward

This scorecard should be used in conjunction with the FOCUS article, “Twelve Value Drivers Help Ensure Success in Today’s Tough M&A Environment.” Detailed definitions and examples for each of the twelve areas listed here are included. Remember that potential partners--including customers, suppliers, distributors, licensees, lenders, equity investors, and potential acquirers--will be creating their own profile in order to evaluate their alternatives.