

Raise your hand if you'd just like to know what you're doing right...and where you need to focus your priorities.

EXIT



Chairman's View in Action

Our clients are visionaries. They want to grow their companies and generate multiple exit options. Come see how we help our clients become owners that create sustainable and transferable businesses!

WelchGroup Chairman Advisors are seasoned entrepreneurs. They have been in the trenches, have learned from their mistakes, and know what it takes to create value and run a successful company. When John Baizana, owner of Baizana Insurance Brokers Ltd. met with one of our Chairman Advisors, Dragan Veljovic, he began to view his company differently.

"I have known Dragan for many years and have always respected the way he ran his own company. He made me question my own operations and whether my business was achieving its full potential. Chairman's View made me look at my brokerage from an owner's perspective, and not that of the President."

A value dashboard is produced in Phase I of the engagement which clearly captures a company's ability to generate profit in its market and assesses whether the business is sustainable and transferable. An action plan is generated to prioritize the owner's goals, so that maximum value can be created.

"The owner's report was a bit overwhelming at first, as it highlighted many issues that I wouldn't have necessarily seen as priority or something that could add value to my brokerage. It has helped me to think of the big picture and to focus my efforts on building a valuable business, not just a book of business."



Owner of Baizana Insurance Brokers Ltd., John Baizana.



In Phase II, the action plan is executed - projects are identified, prioritized, implemented and the progress monitored.

"As business owners, one of the biggest challenges we face is time management. While I had many great ideas on where I wanted my business to be in the next 5, 10, and 15 years, it was finding the time to implement these ideas that was the challenge. My Chairman helped me prioritize the steps needed to achieve my goals and has been a valuable addition to our team."

"We now have a clear direction and my Chairman helps me make better decisions. In many ways my Chairman has become my Senate. He has given me a sounding board to throw different ideas and plans, which has had immediate impact, not only on the value of my brokerage, but on my employee loyalty and company-wide productivity. There is more transparency in my business, which is allowing me to focus on my primary objective - growth."

Phase III provides you with exit strategy options in line with your personal and business objectives, whether you choose to transition your business to the next generation or sell to a third party.

"I'm 15+ years away from retirement, so an exit plan was never something I considered - until now. It just makes sense to have an end goal in mind and try to create the best options for you and your family, while your performance is at its peak."

WelchGroup is the Canadian Headquarters for Chairman's View, a Boston-based firm dedicated to helping business owners build valuable businesses. By employing the Chairman'sView™ System our experienced Chairman Advisors will provide business owners with affordable, chairman-level advice, act as a sounding board and bring structure and accountability to your organization.

Visit our website to learn more about Chairman's View or click here to schedule your free one hour consultation about how you can create a sustainable and transferable business.