BUSINESS VALUE & CONTINUITY ASSESSMENT

Even if you're not looking to sell, this highlights what buyers often consider. It's not a test—just a look at traits that can make a business easier to run, grow, or hand off. The goal is awareness, not perfection.

Financial Clarity

◻ My financial records are organized and up to date (e.g., QuickBooks, CPA-reviewed)
◻ I can clearly explain all revenue streams and any financial irregularities (e.g., owner add-backs, one-time expenses, seasonal changes)
◻ My P&L, balance sheet, and cash flow statements are readily available and accurate
◻ I've minimized or clearly documented personal expenses run through the business
◻ I've separated one-time events (e.g., PPP loans, settlements, COVID spikes/dips) from core earnings

Operational Structure

◻ I've documented standard operating procedures (SOPs) for key functions
◻ My business can run without me being involved in every decision
◻ No single employee holds critical knowledge or control (no "tribal knowledge")
◻ I've started delegating key responsibilities to a capable team
◻ Our systems (CRM, inventory, billing, etc.) are digital, transferable, and up to date

Customers & Revenue Stability

◻ No single customer accounts for more than 15–20% of our total revenue
◻ We have strong customer retention or recurring revenue (e.g., contracts, memberships, long-term relationships)
◻ We have no unpaid invoices in dispute or aging receivables causing issues
◻ Our pricing and margins are healthy and sustainable across time

Vendor & Supply Chain Resilience

◻ I'm not dependent on one vendor for mission-critical products or services
◻ I have multiple sources or contingency options for key supplies
◻ I'm not exposed to sudden price hikes, product shortages, or single-supplier risk
◻ We have written agreements or terms documented for key supplier relationships

Legal & Compliance Health

◻ The business is in good standing legally and with any necessary licensing or certifications
◻ There are no active or pending lawsuits, liens, or regulatory disputes
◻ Employee, contractor, lease, and vendor agreements are current and documented
◻ Any intellectual property (e.g., website, logos, domain) is owned and transferrable

Brand & Reputation

◻ The business has a positive online reputation (e.g., Google reviews, BBB, social media)
◻ Our name, website, and brand materials are professionally presented and easy to transfer
◻ We have no major unresolved customer complaints or negative press
◻ Customers associate the business with reliability, service, or quality

Growth & Positioning Potential

◻ We have a clear niche or strong differentiators in the market
◻ The business is not easily replaced by DIY tools, automation, or AI
◻ There are realistic opportunities for growth (e.g., new markets, products, systems)
◻ Our margins and pricing support long-term sustainability or expansion

Boxes Checked	What It Might Suggest
18-25	Strong structure and higher buyer confidence.
10–17	Solid footing with room to boost value.
0–9	Still marketable if aligned with the right buyer.

AWEISZ@AWSMBPARTNERS.COM | (980) 946-6695 | AWSMBPARTNERS.COM