

OWNERSHIP FUNCTIONS, VALUATION DRIVERS:



	Partner A	Partner B	Partner C	Partner D
Revenue				
Production - Size of Business				
New Producer Hire and Development				
Rule of 20 Monitoring - New Business Side				
Account Concentration Analysis				
Carrier Relationships				
Maintain and Strengthen Existing Relationships				
Negotiate Better Profit Sharing				
Source New Carrier & Product				
Monitor Carrier Performance, Carrier Stability				
Technology				
Best System & Functionality at Reasonable Budget				
Security				
Finance				
Best Practices Benchmarking				
Budget Process & Budget Monitoring				
Banking/Cash Flow Management				
Financial Reporting - Monthly, Quarterly, Audit				
Rule of 20 Monitoring - EBITDA Side				
Marketing/Operations				
Marketing, Social Media, Web				
Maintain Professional HR Function				
Manage Employee Tenure vs. Turnover				
Evaluate Long Term Needs				
“Vintage” of Producer				
Management Reports, Workload Reports				
Office Facility				
Operational Efficiency, Paperless, EE Backups				
Acquisitions				
Identify, Due Diligence, Negotiate, Close				
Corporate				
Legal, Corporate Docs, Contracts, Producer Agreements				