

DynastyLC Ideal Client Filter™



1. Demographic
2. Psychographic
3. Timing




"It felt like we were flexing a different set of muscles!"

When Private Equity sees the opportunity.

When your banker and CPA sees the need.

When your lawyer sees the need.

When an Investment Banker or Business Broker sees the opportunity.

Criteria	Scoring rubric	Score	Outcome	Current client Conditions:
<div> 2+ CEO Vacation Rule</div>	CEO takes 2+ vacations (friends & family) per year CEO takes 1 family vacation per year Used to take vacations /now a prisoner of their business 1 vacation, but tied to a business purpose No vacations or time away from business in past 2 years	5 3 2 0 -1		*New CEO stepping in for business founder.
Success with outside consultants	Worked successfully with 2+ outside consultants in past year Worked successfully with outside consultant in past year Worked successfully with outside consultant in past 2 years Worked successfully with outside consultant in past 5 years Worked successfully with consultant at some point Have never worked with outside consultant, coach, etc. Only had unsuccessful experience with outside consultant	5 4 3 2 1 0 -1		*Business has outgrown 1 or more senior leaders.
CEO <div></div>	CEO on the job 1 month to 3 years CEO within 3 years of sale/succession Business is commoditized; Need to begin a Pivot this year CEO on the job 3-5 years CEO on the job 6+ years CEO & founder on the job 11 -20 years CEO & founder on the job 20+ years	5 5 5 2 1 0 -1		*Looking for Strategic Boost to EOS/Traction.
<div> 1st 3 years Last 3 years</div>				*About to put serious capital to work.
50+ Employees & \$5M - \$50M Sales	75+ person company with \$8M+ in sales 100+ person company over \$25M in sales 50+ person company with at least \$5M in sales 30+ person company under \$5M in sales 250+ person company <30 person company Lifestyle business	5 4 3 2 1 0 -1		*Growing out of control.
Intellectual Capital vs. Low price	Have created "productized" solutions that scale All solutions custom / <100 clients/ premium priced Bill by the project Most solutions are custom Resell others products or solutions + customize Bill by the hour Resell other peoples products with markup (no custom) Regularly discount (Manager approval) Seasonal or annual sales (customer conditioning) known for being higher priced than competition	5 4 3 2 1 0 -1 (deduct 1 point from total) (deduct 1 point from total) (Add 1 point to total)		*Board of Directors looking for sale or personal liquidity.
Clear Strategic Challenges & possible current symptoms	Experiencing unacceptably high employee turnover Seeing sales margins compressed Finding it difficult to bring on and retain new clients Days are spent putting out fires vs. big picture strategy Growth of the business is a problem (too much / too little) CEO finding themselves "doing" vs. leading Everything is going according to plan - No reason to change	+1 +1 +1 +1 +1 +1 -5		* Just tried to execute sale on their own & failed.
3X Vision	"I see us in the near future at 3x our current size!" Has a vision and a plan to grow by 20% or more Has a plan and a target Has a target or a plan Hope to beat last year's numbers (no plan or strategy) This is a Lifestyle company Company is in free-fall and no plans to stop it	5 4 3 2 1 0 -1		Baseline Go - NO Go Suspect Demographics Prospect Action Triggers



DYNASTY
LEADERSHIP