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*Jay Rasmus, Partner, Mahoney Sabol & Company, LLP*

**CoreValue®**  
S O F T W A R E

## Unlocking the Door to New Clients

*Jay Rasmus, Partner Mahoney Sabol & Company, LLP, CT*

As a mid-sized, ten partner accounting firm in Glastonbury, Connecticut, Mahoney Sabol sought an affordable and efficient way to enhance their services and differentiate the firm from competition. According to Partner Jay Rasmus, “We wanted a tool that would quickly enable a discussion with prospects and clients around company value, knowing that a more valuable company would make for a more satisfied client.”

Whether used for existing clients or attracting new clients, CoreValue® is the solution for Mahoney Sabol. “CoreValue provides us with an easy way to discuss enterprise value, how to improve it, and what it means when achieving the personal and business objectives of our clients.”

As a company’s enterprise value is sometimes not fully understood by owners, Mahoney Sabol uses CoreValue® to conduct analysis and generate reports to open a discussion around improving performance,

value, and increasing the likelihood of a successful transfer, whenever that may be.

“CoreValue’s software has helped us open the door to many clients, some of which already had relationships with another CPA firm. The CoreValue® structure, outputs and reports allow us to have a clear and easy discussion around non tax and non accounting issues.”

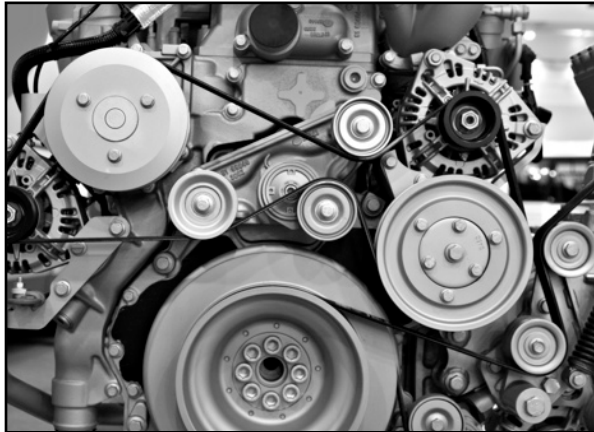
For clients already having a CPA, this value-add approach did not threaten that relationship. To the contrary, it paved the way for other business services and gave Mahoney Sabol the opportunity to become the trusted business advisor to many companies, including those contemplating a transfer of ownership.

“As so many CPA firms are trying to modernize and expand their offerings, CoreValue® and its intuitive functionality, clear and informative graphics, and powerful

task generator, helped us get in front of prospects that otherwise would have said, ‘no thanks; we’re happy with our CPA firm’.”

In one positive case, a wire and cable manufacturing client of Mahoney Sabol was approached by a public company to be acquired. After using CoreValue®, Mahoney Sabol strongly believed the offer to be too low and suggested the company could do much better if it made improvements identified by CoreValue®. The business owner ultimately turned down the offer to work on the company so he could secure a better offer down the road. As a result of recommending CoreValue®, “We cemented an already strong relationship with the client who will forever think of us as much more than an accounting firm.”

# Business is an engine.



**CoreValue® measures the gears inside and calculates how well they function.**

If you think of business as an engine, and that financial valuations measure *the outputs*—the revenue and profit—CoreValue® quantifies the ‘gears’ inside the engine, and the ability of those gears to work together to drive future revenue and profit at/ or above its current rate.

**Sales & Marketing » Market Research**

**Goal:** You have access to, and regularly use, market research to make informed marketing, sales, and operational decisions.

**Hint:** Market research can include such things as surveys, feedback, focus groups, and quantified data on usage, trends, attitudes, etc. Trade associations are usually a great resource for market research.

We use data to back most of our decisions  
 We use data for the big decisions  
 We sometimes use data  
 We rarely use data  
 We prefer to shoot from the hip

**CoreValue**  
SOFTWARE

[www.corevaluesoftware.com](http://www.corevaluesoftware.com)

