



**Scott Tappan –
Outsourced VP of Sales**

SALES DUE DILIGENCE

How to Eliminate Post-Investment Surprises



COMMON POST-ACQUISITION SURPRISES

- Learning the sales manager and sales team are incapable of achieving desired results
- Discovering the current book of business is more volatile than previously understood
- Uncovering the sales pipeline is not grounded in fact, but merely opinion
- Discovering sales is negatively impacting business operations
- Determining there is an inefficient sales system in place that won't allow the company to scale properly
- Investing in a company and discovering they can't scale to desired projections/expectations



POOR INVESTMENT CONSEQUENCES

- Unable to attain sales goals or targets
- Taking on debt to support cash flow
- Longer than expected timeline to sell the company
- Loss of acquisition costs when the investment isn't realized
- Selling the acquired company for a loss





SUCCESS FORMULA



QUANTITATIVE + QUALITATIVE = SUCCESS

- Focusing on quantitative data provides only partial insights into a company's background and future opportunities
- Qualitative data allows a buyer to gain greater context
- When both elements merge, a complete story comes to light



**TRADITIONAL DUE DILIGENCE + ISA =
BETTER OUTCOMES**

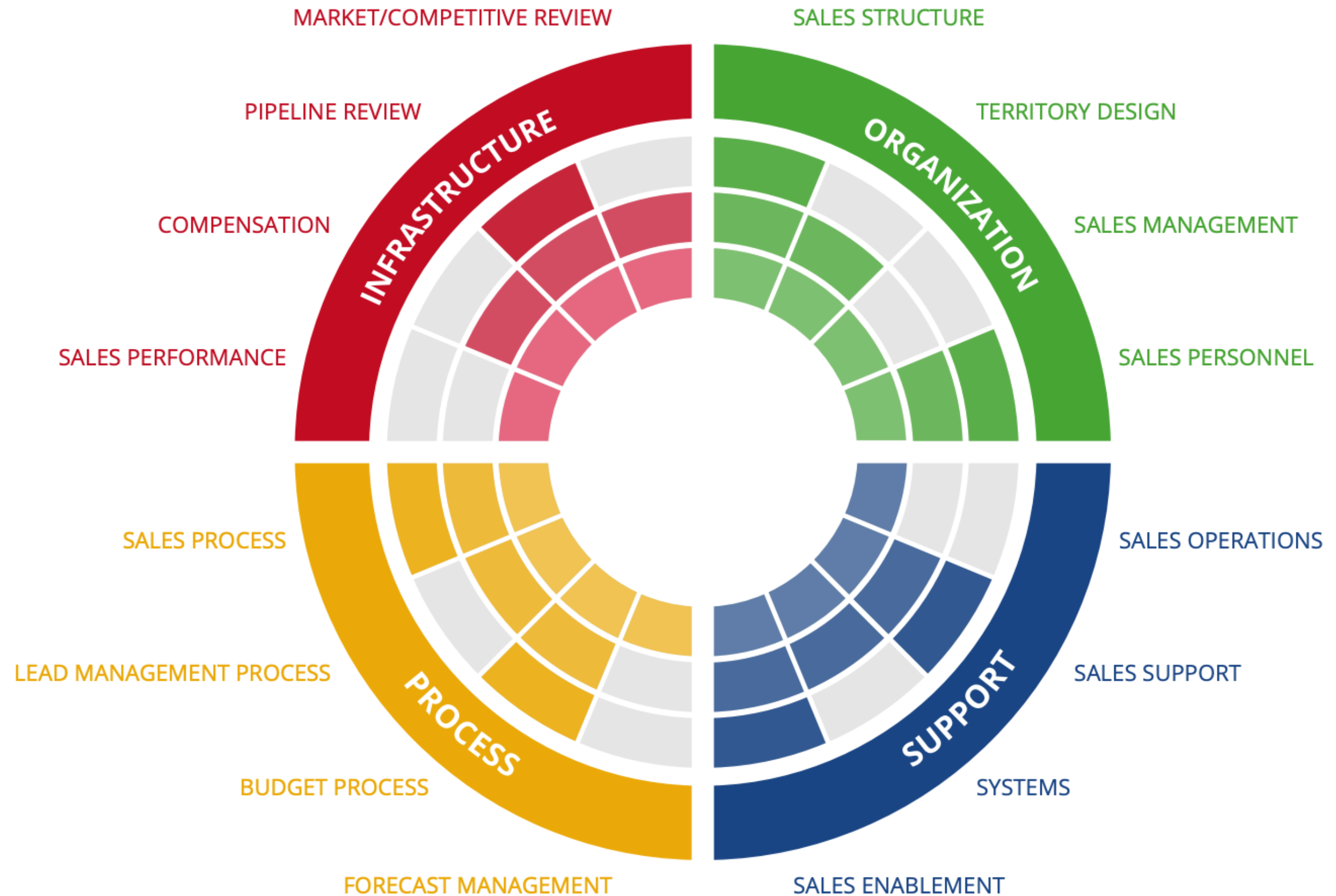
INVESTMENT SALES ANALYSIS

- Investment Sales Analysis (ISA) - Provides an in-depth sales due diligence analysis that helps business owners and investors make profit-aligned decisions when buying or selling a company
- Clients gain key insights concerning the true state of their company's sales infrastructure and resources and how capable it is to grow at the desired pace
- The analysis is led by an experience VP of Sales, who evaluates and rates 16 critical sales drivers under four categories:
 - Sales Infrastructure
 - Sales Process
 - Sales Support
 - Sales Organizational Systems





- A graphical “heat map” of the current status of 16 critical sales drivers
- An executive summary with expert recommendations on investment opportunity and risk
- A detailed breakdown of the critical sales drivers





BUYER BENEFITS:


- Greater return on investment
- Better “batting average”
- Uncover hidden “hurdles” not typically found via the traditional due diligence process
- Valuation to determine if you should invest or “walk away”
- Deciphering between typically arbitrary/optimistic opinions of existing revenue base and opportunity pipeline – verify what is factual





- **VP of Sales experience:**
 - Sales due diligence is performed by a former corporate VP of Sales
 - SX Advisors have an average of 25 years of executive sales experience
- **Sales Xceleration experience:**
 - SX has worked with over 3,000 companies
 - SX has worked in over 80 different industries



A background image showing a group of business professionals in a meeting. They are gathered around a table, looking at various financial documents, charts, and a laptop. The scene is overlaid with a semi-transparent blue filter. The main text is centered over the image.

RISK CAN'T BE AVOIDED, BUT RISK CAN BE REDUCED

with Sales Xceleration's Investment Sales Analysis



CONTACT ME TO LEARN MORE:

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