



Institute of
Advisors

INSTITUTE OF ADVISORS SMART ADVISOR



**Win More Clients.
Convert More Prospects.
Build Your Advisory Business.**

IOA Smart Advisor is the ultimate business advisory software designed to help you analyze a client's business, generate leads, and convert more prospects – all while leveraging the trusted Institute of Advisors brand. With IOA Smart Advisor, you can quickly engage with clients and prospects by using a proven step-by-step methodology. The software streamlines the advisory process, making it easier to demonstrate value, impress clients, and close more deals.

HOW IT WORKS

A SIMPLE 4 STEPS PROCESS

Step 1: Select the assessment module you want to use.

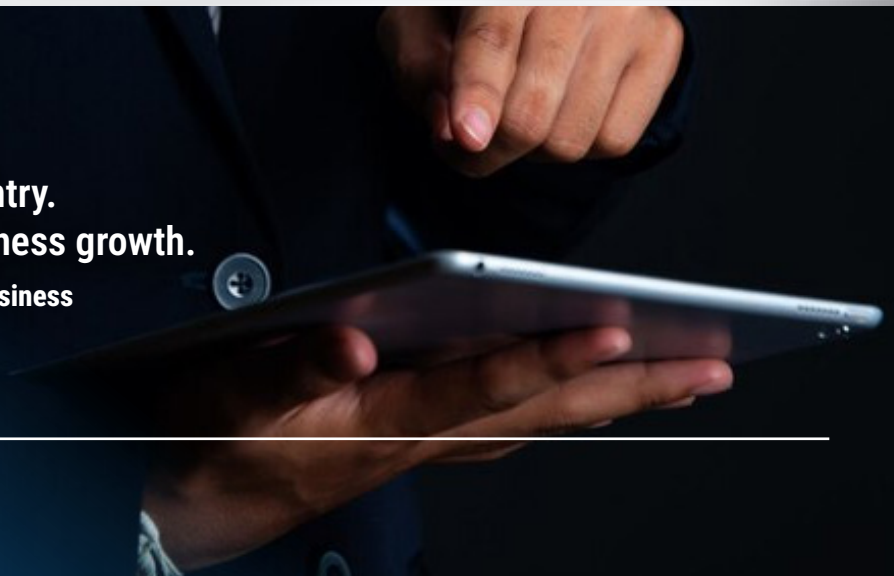
Step 2: Send the unique link to your client.

Step 3: Your client completes the questionnaire. You get notified instantly.

Step 4: Log into the dashboard, generate a detailed report and impress your client with actionable insights.

- ✔ **No complex setup.**
- ✔ **No time-consuming data entry.**
- ✔ **Just results that drive business growth.**

The easiest way to **offer professional business assessments** and win more clients!



THE SOFTWARE INCLUDES SIX POWERFUL MODULES TO ELEVATE YOUR ADVISORY SERVICES



MODULE 1 BENCHMARK SCORECARDS

The Benchmark Scorecards provide a comprehensive business assessment across seven critical areas: Sales & Marketing, Strategy & Planning, Customer Satisfaction, Financial Stability, People & Leadership, Compliance & Risk Management, and Warning Signs. Using 68 targeted questions, advisors can benchmark businesses against industry standards to highlight strengths and improvement areas.

This tool delivers structured insights to help business owners optimize operations, mitigate risks, and ensure sustainable growth. Advisors can use this data-driven approach to offer strategic recommendations and position themselves as trusted consultants.

Why Advisors Love This: It provides an easy-to-use, structured framework to identify key business gaps and opportunities, helping advisors deliver high-impact, professional assessments with minimal effort.

MODULE 2 GROWTH FUNNEL SALES CALCULATOR

The 6-Way Funnel Profit Improvement Calculator helps advisors analyze and improve a business's sales pipeline by identifying key revenue growth opportunities. By inputting data such as conversion rates, customer numbers, and profit margins, this tool generates actionable insights that align with business goals.

It provides a comparative analysis of existing vs. forecasted data, identifies four key growth levers, and generates optimized revenue targets. Advisors can use this module to deliver clear, practical strategies that help clients increase profitability and efficiency. **Why Advisors Love This:** It transforms complex sales data into clear, actionable strategies, making it easier to engage clients and drive measurable financial improvements.

MODULE 3 BUSINESS VALUATION CALCULATOR

The DCF Business Valuation Calculator estimates a company's worth based on financial metrics and industry benchmarks. It evaluates revenue, profitability, growth rates, risk factors, and non-cash adjustments, offering business owners a clear picture of their valuation.

While this is not a formal business valuation, it provides a useful financial roadmap for decision-making. Advisors can use this tool to help clients assess market positioning, attract investors, and prepare for future growth. **Why Advisors Love This:** It enables advisors to provide clients with a quick, data-driven estimate of their business value, reinforcing their expertise and fostering deeper strategic discussions.

MODULE 4 EXIT & SUCCESSION READINESS ASSESSMENT

The Exit & Succession Readiness Assessment helps business owners prepare for a profitable exit or transition. It evaluates critical areas such as financial health, operational efficiency, client relationships, leadership succession, and compliance to determine readiness for sale.

By identifying potential risks and growth opportunities, this module ensures a business is strategically positioned for a successful transition. Advisors can use it to guide clients through the exit planning process, ensuring maximum value and seamless business handover.

Why Advisors Love This: It simplifies the complex process of business succession planning, allowing advisors to guide clients in maximizing their company's value before a sale or transition.

THE IOA SMART ADVISOR ADVANTAGE

With these Six powerful modules, advisors can:

- Generate high-quality business reports effortlessly
- Engage clients with professional-grade analysis
- Demonstrate value instantly, winning more business
- Provide structured, strategic advisory services

**Stand out in the market.
Deliver results.
Grow your advisory business.**

Join the next generation of business advisors with IOA Smart Advisor!

MODULE 5 CLIENT DISCOVERY

The Client Discovery module provides a structured framework for advisors to uncover a business owner's goals, challenges, and priorities. Through targeted questions and guided conversations, advisors can capture critical insights that inform tailored strategies and actionable recommendations. This module helps advisors build trust, identify opportunities for advisory services, and position themselves as strategic partners in their clients' growth.

Why Advisors Love This: It simplifies the discovery process, ensuring that advisors consistently gather all key information while delivering a professional, consultative experience.

MODULE 6 VALUE GAP CALCULATOR

The Value Gap Calculator enables advisors to show the before-and-after impact of business improvements on long-term value. By analyzing revenue growth, profit enhancement, and risk reduction, this module quantifies how operational changes translate into measurable business value.

Advisors can use the insights to help clients prioritize initiatives, justify investment decisions, and demonstrate the financial benefits of strategic actions.

Why Advisors Love This: It makes business value tangible, turning complex performance data into clear, client-friendly insights that support impactful advisory conversations.

BENCHMARK



Assess key areas of business performance

GROWTH FUNNEL



Identify revenue growth opportunities

BUSINESS VALUATION



Estimate company value

EXIT & SUCCESSION



Plan for a profitable transition

VALUE GAP



Estimate your value gap

CLIENT DISCOVERY



Uncover client needs

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Contact us today to learn more!