Seminar Series

Intangible Assets – Customer Capital

BOSS

Business Owners Strategic Solutions

THE SUCCESSION JOURNEY SERIES

DISCLAIMER

Things my attorneys make me say.

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Intangible Assets – Real or Fiction

- Intangible assets are hard to grasp for many business owners.
- Unlike tangible assets that are reflected on the Company's balance sheet, intangible assets are typically not reflected on the financial statements.
- But when the market creates multiples for valuations, the multiple includes a value for goodwill and blue sky. That is the effect of the intangible assets with transferrable value.
- By harnessing the intangible assets and creating transferrable value, the intangible assets become real enhancements to the value of the business.
- There are 4 primary intangible assets:
  - Social Capital – Last Month's Topic
  - Customer Capital – Today's Topic
  - Structural Capitall – Topic for April
  - Human Capital – Topic for May

Intangible Assets

Growth, Value, and Transferability

BIG DEAL Marketing Group

Intangible Assets

4 Pillars

Authority
Visibility
Trust
Relationship Equity

90%

90% of your company’s value comes from intangible assets -
that’s up from 17% in the 70’s

Why it Matters

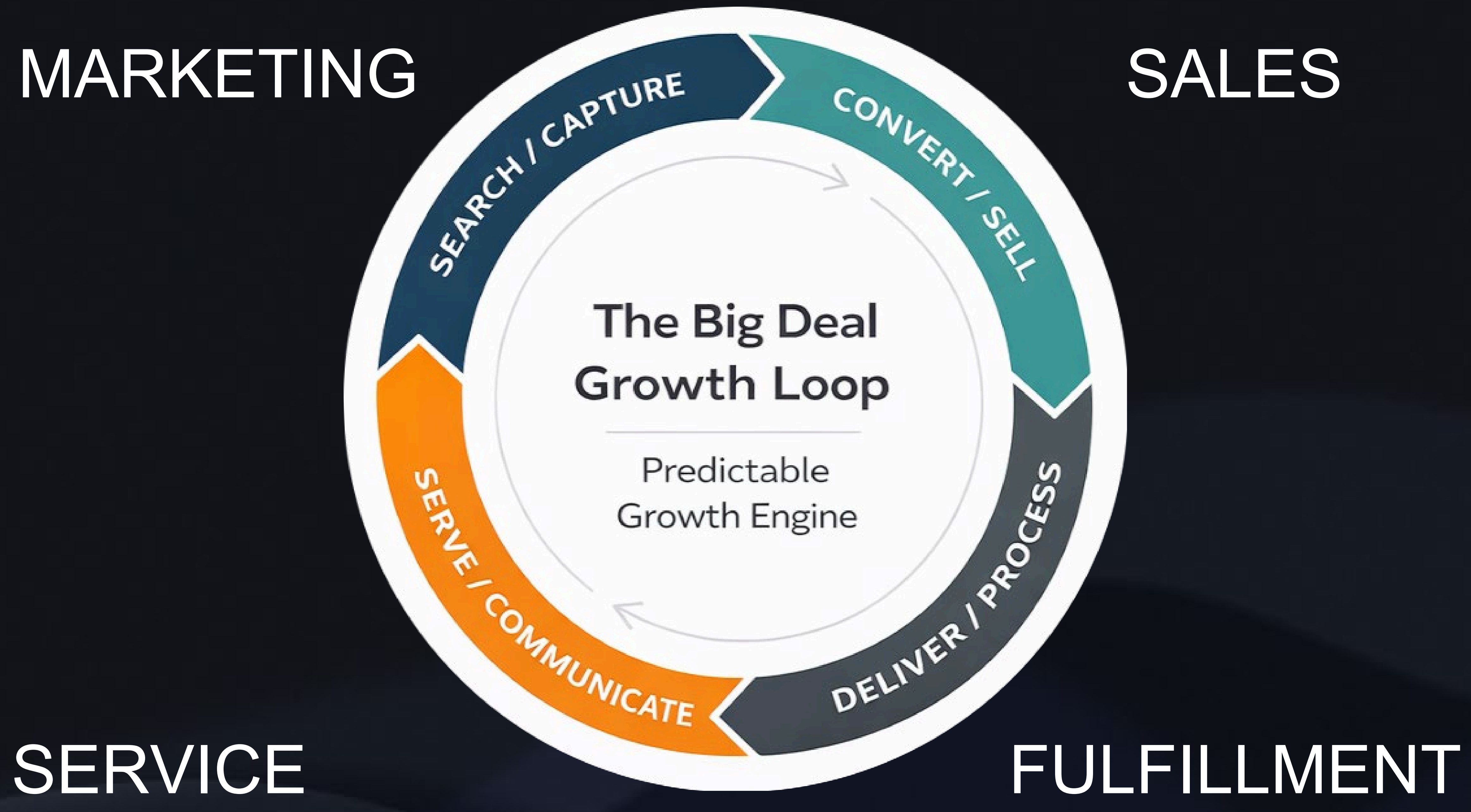
(Intangible Assets)

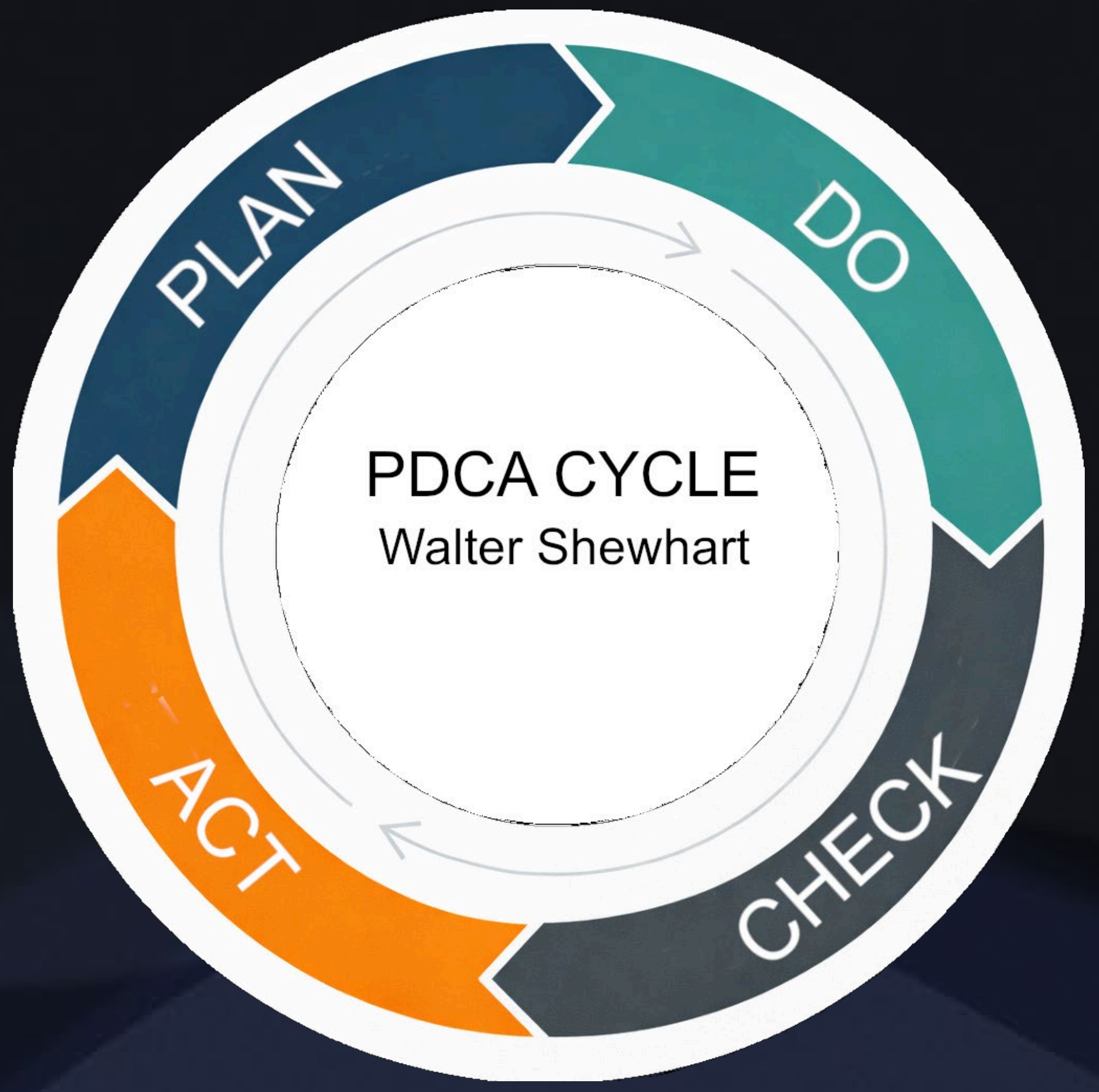
- Increases the value of your business
- Reduces owner dependency
- Builds buyer confidence

These are what make your company worth more when you are ready to sell

COMPANY GROWTH

PROCESS IMPROVEMENT





Define Your Customer

- Go to your customer database
  - 80/20 rules says that 80% of your income comes from 20% of your customers -
    - Find them
    - Define them
    - Market to them
    - Build your processes around them
    - Sell to them
    - Keep them

Define Your Customer

What about the other 80%? -
Using the bell curve as a model

20 | 60 | 20

The top 20% are your champions but the majority of your customers fall in the middle 60% - these customers a your bread and butter. The 20% at the bottom are at-risk, low-usage customers and aren't worth your time. You don't want these customers.

Authority

Expert Positioning

- White Papers
- Blogs / Articles / Case Studies
- Social Media Posting - LinkedIn / Others
- Industry Peer Groups
- Keynote Speeches / Panelists
- Seminars & Conferences

Thought Leadership is <u>Content</u>
Visibility is <u>Placement</u>

Brand Recognition

3 - 7- 27 Brand Strategy

- 3 Interactions - The initial point where potential customers NOTICE or gain awareness of a brand
- 7 Interactions - The point at which a consumer begins to REMEMBER the brand
- 27 Interactions - The threshold needed to build enough TRUST and familiarity for a consumer to consider a purchase or become a loyal customer

Brand Recognition

Interactions 3 - 7 - 27 Rule

NOTICE 3

REMEMBER 7

TRUST 27

Tools for Consistent Presence

Moving people from noticing you to trusting you

- Website - Marketing Hub
- Google Business Profile - SEO
- Social Media Posting - LinkedIn
- Ad Campaigns
- Community Engagement

Trust & Relationship Equity

are often the most overlooked, and are arguably the most impactful

to your business's value & transferability

What is Trust & Relationship Equity?

The measurable value of:

- Your credibility
- Your reputation
- Your relational network
- Your depth of connection
- Your ability to generate opportunity through relationships

It’s NOT just “being liked”

It’s <u>transferable relational capital</u>

It is the asset value of human confidence

in you and your firm

This shows up as…

- Inbound referrals
- Shorter sales cycles
- Premium pricing tolerance
- Lower client turnover
- Repeat engagements
- Easier partnerships

Trust Equity vs. Brand Awareness

Brand Awareness

- People know you exist
- Visibility
- Marketing metric
- Top of funnel

Trust & Relationship Equity

- People rely on you
- Credibility
- Asset metric
- Deep loyalty

You can have visibility w/o trust. You cannot have trust w/o relationship depth

Elements of Trust & Relationship Equity

- Credibility Capital
- Relationship Ownership
- Depth of Trust
- Network Density
- Institutionalization

Trust and relationship Equity Assessment

Let’s go to the worksheet

90 Day Absence Test

What percentage?

- If you were absent for 90 days, what percentage of revenue would remain?
- Which areas would be affected?
- What are your top 10 revenue relationships?

Credibility Capital

Score 0-4

- Testimonials and client success stories are documented
- Case studies exist under the company brand
- The business is recognized as an authority in the market
- Speaking, media, or thought leadership exists
- Credibility exists beyond the owner personally

Relationship Ownership

Score 0-4

- Key client relationships are tied to the company
- Referral partners are documented
- Relationship data exists in a CRM
- Eam members can manage top accounts
- A transition plan exists for major relationships

Depth of Client Trust

Score 0-4

- Majority of revenue comes from repeat clients
- Referral sources are consistent and measurable
- Clients publicaly recommend the company
- Customer retention is high and tracked
- Clients purchase multiple services

Network Density

Score 0-4

- You actively connect clients and partners
- Strategic alliances are formalized
- You collaborate with partners on events or initiatives
- Partners regularly refer opportunities
- Your business is considered a hub in the network

Institutionalization

Score 0-4

- Referral generation is documented and intentional
- Client onboarding is standardized
- Relationship ownership is assigned to team members
- CRM usage is consistent across the company
- Trust-building activities are scheduled and measured

Trust Equity Score

- 80-100 - Institutional Asset that supports higher valuation
- 60-79 - Strong Business but Founder Dependent
- 40-59 - Moderate Key-Person Risk
- Below 40 - Significant Transferability Risk

Where do you fall?

Reflection Exercise

- What part of your business depends most on you personally?
- What relationship would hurt the business most if lost?
- What is one relationship system you could build this year?

Final Question

- If you exited your business within the next 5 years…would buyers be purchasing your company or your personal relationships?

Quick Share

- What's your weakest area?
- What would break first if you exited?
- What's one move you could make this quarter?

The Valuation Impact

<u>Buyers discount:</u>

- Founder-dependent relationships
- Undocumented referral systems
- No CRM adoption

<u>Buyers pay premiums for:</u>

- Institutionalized trust
- Recurring referral ecosystems
- Transferable authority

Revenue is rented. Transferable trust is owned.

Business Health Check

A structured assessment that measures how transferable your business is

Scan this with your phone

BUSINESS ENHANCEMENT SEMINAR SERIES, AND TOPICS OF INTEREST

Seminar Topics and Recommendations:

In addition to the succession planning series, there will be other seminars throughout the year on various topics of interest such as business assessments and enhancements, employee benefits, financial planning, tax planning, and business coaching.

If there are particularly topics of interest you would like to share, please email your suggestions and recommendations to info@theoneboss.com.

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VISION

To be the leading catalyst for business transformation, fostering a thriving community where owners harness their enterprise's full potential. Through valuations, targeted coaching, and strategic succession planning, we aim to elevate business value and empower growth. By creating a dynamic membership community enriched with interactive discussions, exclusive events, and cutting-edge educational resources, we envision a future where every business owner is equipped to drive lasting success and achieve their highest aspirations.

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Information about our partners can be found on the website here …

www.theoneboss.com/boss-partners/

NEXT SESSION – BUSINESS SCORECARDS

Business Intangible Assets
Structural Capital
April 21, 2026
7:30 am to 9:00 am
4417 Corporation Lane, 1st Floor Seminar Room
Virginia Beach, Virginia 23462

Presenter: Bernd Haase

Bernd is the founder of LeadershipConnect Consulting LLC. Bernd has mentored, coached and supported business owners with the organizational structure, business development and employee development. LeadershipConnect specializes in supporting business owners to achieve their personal and company vision.

Help Us Grow — Your Feedback Matters!

Your insights help us improve—and your reviews help others find us.

How You Can Help:
Leave a review on Google……

Thank You for Supporting Our Mission to Empower Business Owners!