

Succession Plus launches Business Succession and Exit Planning platform

Capitaliz has been launched to help facilitate the valuation, benchmarking, value enhancement and successful exit of mid-market businesses internationally

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[Capitaliz](#) has been launched to help facilitate the valuation, benchmarking, value enhancement and successful exit of mid-market businesses internationally. Based on the highly successful 21 step Business Succession and Exit planning model used by [Succession Plus](#) to become Australia's largest exit planning firm, the platform allows these services to be delivered at scale internationally.

“

I am passionate about helping business owners and their advisers successfully exit – for many, this is a life-changing event - Capitaliz has been specifically designed to make this a reality”

*Craig West CEO & Founder
Succession Plus*



Capitaliz Logo - powered by Succession Plus

CEO & Founder of Succession Plus, Craig West commented “When I first started to work with clients on exit planning in 2009, there were no tools available, nothing that was succession and exit planning focused – I developed a 21 process and have since used that model to help over 700 clients maximise the value of their business and achieve a successful exit. Capitaliz has been custom built by exit planners for exit planners to fill this gap in the market and allow advisers to deliver consistent results at scale.”

The Capitaliz platform is already in use by Succession Plus in Australia as well as being used by advisers in NZ and UK. The launch into the North American market (in conjunction with both the Exit Planning Institute and [opnroad.io](#)) at the [10X Live](#) event in September, is an important step for the Capitaliz business.

Newly appointed CEO Danielle Nugent added that “the Capitaliz software has been developed over the last 18 months to allow advisers to scale their exit planning practice by using the world's leading tool – and ‘Capitaliz’ on the baby boomer demographic who are heading towards the exit.”

The platform features over 400 data points for each business and tracks value dynamically throughout the process, allowing both advisers and owners to see the results of the preparation work and making sure they can reach their exit target.

Mr West further explained that the two biggest issues for advisers who work in succession and exit planning were convincing clients to take action early to secure their exit and having a decent toolkit to manage the process. “I am passionate about help business owners and their advisers successfully exit – for many, this is a life-changing event - Capitaliz has been specifically designed to make this a reality using a proven methodology and an online platform”

Capitaliz is the comprehensive digital toolkit to help advisers deliver consistent succession planning guidance and value acceleration for clients. More than 12 years of exit planning experience went into building Capitaliz, based on proven methodology and process.

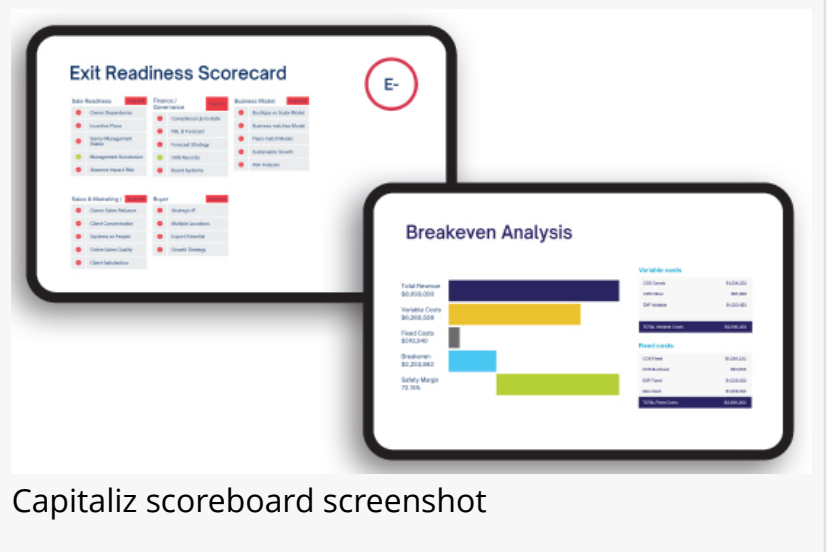
Designed by exit planners for exit planners, Capitaliz enables advisers to implement scalable business valuation, succession, and exit planning outcomes and in turn, increases their productivity and efficiency. In a game-changing first, Capitaliz’s automated implementation approach brings consistency to valuations, insights, and advice providing a consistent quality of experience for all clients. Three key elements will allow advisers to unlock the potential value in the mid-market by helping business owners realize and extract their business value as they step away from the helm:

Valuation - Capitaliz is the first tool to enable dynamic real-time business valuations at any point a qualitative or financial variable is updated. Advisers and their clients can see that value grow as changes are implemented

Benchmarking -Capitaliz enables business performance evaluations relative to industry peers by highlighting the profit gap potential. Coupled with the VPITM (Value Potential Index) the Report



VPI screenshot



quantifies future value based on improvements.

Insights - Capitaliz's comprehensive financial and qualitative analysis provides insight into key business risks through six proprietary scorecards including the Exit Readiness Scorecard.

At the same time, the Capitaliz team have launched the Value Potential Index which allows Capitaliz to accurately assess value potential for each business and determine the most appropriate actions to take in the order of priority that will most affect the valuation (based upon implementing the recommendations from a Capitaliz Business Insights Report). The Value Potential Index includes economic-, industry- and business-based risk scores to determine the appropriate multiple and the gaps identified in the report for profit gap, benchmarking, exit readiness and attractiveness, to determine the value potential.

The Value Potential Index is recalculated each time a new valuation is completed, updating regularly with any changes in economic factors, industry trends or business sentiment.

Craig West

Succession Plus

418414766 ext.

CWEST@SUCCESSIONPLUS.COM.AU

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