

Playbook

How to position valuation & business insights to clients and COIs

A practical toolkit for financial professionals to unlock opportunities by integrating business value and insights into strategies



“The goal of this playbook is to equip you with practical language and a structured approach so you can unlock better conversations that build trust, create momentum, and open the door to deeper strategic opportunities with owners.”

Cory Siegfried

Chief Client Officer @ RISR

Playbook contents

1 A Five Step Process for Working With Business Owners

A straightforward workflow you can use with every owner, from early discovery to strategic conversations.

2 Client Outreach Template

A ready-to-send email you can use to invite clients to begin the valuation process.

3 “Why this matters” script for engaging clients

A concise, confident explanation of why valuation and business insights matter in financial strategies.

4 COI positioning framework

Talking points tailored for CPAs, attorneys, and consultants that position you as a helpful resource, not someone asking for referrals.

5 Integrating RISR Into Your Workflow

Use RISR to identify opportunities, start better conversations, and consistently engage business owners and COIs.

SECTION 1

A Five-Step Process for working with business owners

Business owners need structure, but they also need simplicity. This section introduces a practical, repeatable workflow you can use with any owner – regardless of business size, industry, or strategic readiness.

Each step builds upon what great professionals already do: frame the importance, gather the right information, deliver meaningful insights, and translate those insights into wealth, risk, exit, and tax strategy conversations.



1. Frame the importance of a business valuation clearly

Show owners that business valuation is a normal, essential part of strategy.

 “Estimating business valuation gives us the clarity we need to complete your financial plan.”



2. Schedule a meeting to review the process

Generate momentum by showing owners the steps to the process:

 Gather financials  Complete survey  Review estimates  Update plan



3. Dedicate a followup meeting to review and complete data intake

Having a followup meeting to review the data encourages owners to share data key data and makes the process more seamless for them.



4. Deliver initial insights

Walk through business value, risks, opportunities, and alignment with personal goals.

 [Watch RISR video on how to use business insights to engage](#)



5. Convert insights into strategy

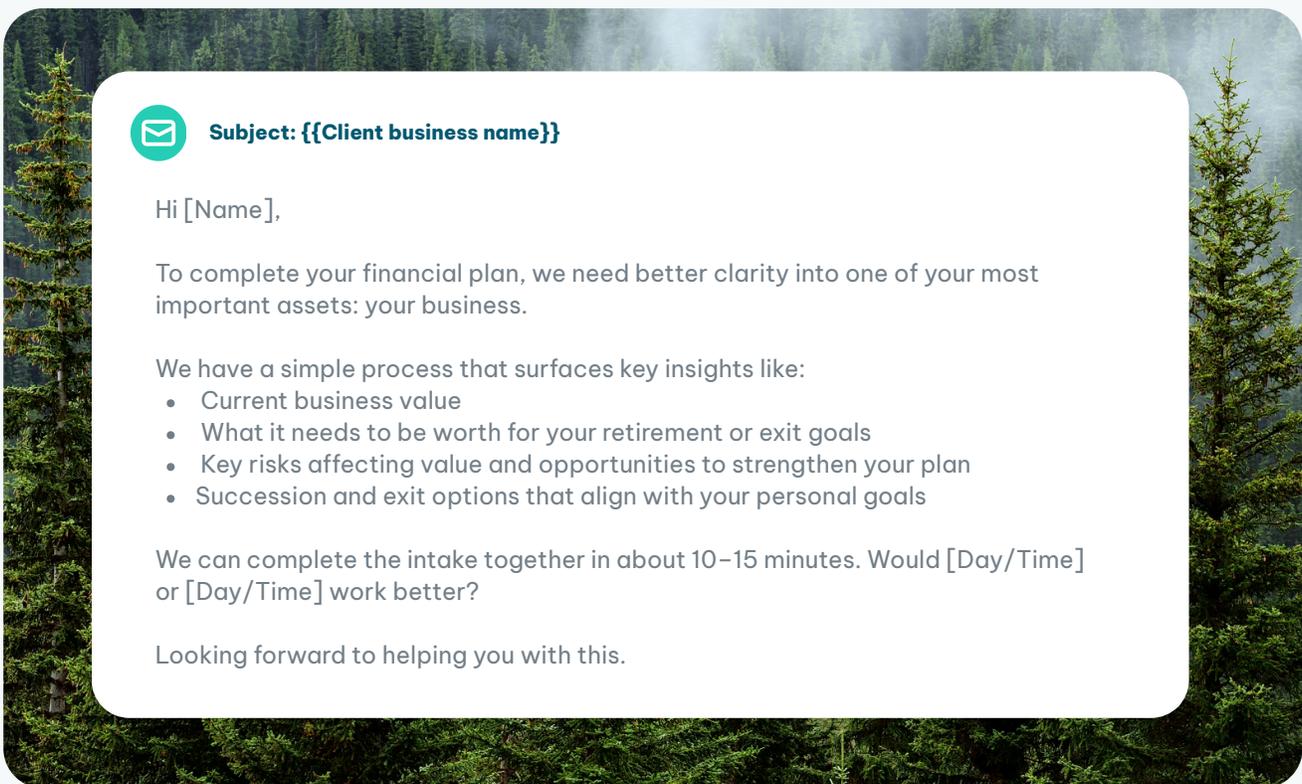
Transition naturally into wealth, risk, exit, and tax strategy conversations to show owners it shows how business clarity drives personal financial strategy.

SECTION 2

Client Outreach Template

Inviting a client to begin a valuation can feel intimidating if you don't have the right words. This section provides a proven, ready-to-send email that clearly communicates why the process matters and what clients will gain from it. It's designed to remove friction, set expectations, and make it easy for owners to say yes, whether you're reaching out proactively or following up on a strategic conversation.

Email template: use for first outreach or to follow up after a strategic review



What this means and why it matters

You're showing the client that valuation is part of real financial strategy, not extra work. This reduces hesitation, increases acceptance rates, and gets the process moving faster.



Need more examples?

[See our marketing email templates and client-facing materials](#)

SECTION 3

“Why This Matters” Script

Financial professionals often know a business owner’s largest strategic blind spot long before the client does. Owners make decisions daily that impact their financial future, yet they rarely stop to assess what the business is worth or how it supports their long-term goals. This section gives you a clear, confidence-building script to explain why valuation and business insights matter, and how they complete the financial strategy picture in a way clients instantly understand.

Script : A simple and powerful way to frame the conversation



“Your business is likely the largest, most important, and most opaque part of your net worth. I can bring better clarity to your financial plan with our business valuation and insights process.



“Together we can uncover what the business needs to be worth for your long-term goals, how you’ll eventually exit or transition out of it, and the risks and opportunities between now and then.”



“We use RISR to securely and seamlessly get clarity into your business. The first step is to gather the last 3 years of your profit & loss and balance sheet statements. Are you free next week to start the data intake process together?”

What this means and why it matters

This framing positions you as the professional who brings clarity to the owner’s most consequential asset. It helps the owner immediately understand why valuation is not optional, reduces hesitation around the process, and sets up deeper strategic conversations that naturally follow once clarity exists.

SECTION 4

Positioning Yourself to COIs

Centers of influence are essential partners when working with business owners, but many financial professionals struggle with how to position themselves without sounding transactional. This section outlines how to introduce your value to CPAs, attorneys, and consultants in a way that strengthens collaboration and elevates their work. These talking points help you demonstrate how clarity around business value enhances the guidance COIs already provide, making you a resource, not another referral request.

Set up: clearly explain how you support owners in areas COIs already care about



“Our new business insights capabilities help owners by:

- Estimating what their business is worth today
- Identify risks and operational pressure points they may not see
- Showing what the business needs to be worth to achieve their retirement or exit goals
- Highlighting succession and exit plan options that align with their personal goals”



“This gives your clients clarity on their largest asset and naturally leads into deeper tax, legal, and strategic conversations—making your work even more valuable.”



“Please find an overview of our new business insights capabilities attached”

[Add your logo to this one pager and summary video to share with COIs](#)

What this means and why it matters

This positions you as a partner who strengthens the COI’s relationships and elevates their work. It builds trust quickly, makes collaboration easier, and naturally increases the likelihood they’ll introduce you to business-owner clients because the value is so clear.

SECTION 5

Integrating RISR Into Your Workflow

RISR isn't just a strategy tool; it's a conversation engine that helps you get in front of more business owners and the COIs who influence them. When woven into your daily and weekly workflow, RISR gives you a simple way to identify who to approach, what to say, and how to follow up with meaningful insight. This section outlines the key touchpoints where RISR supports your outreach efforts so you can consistently start conversations, deepen relationships, and create more opportunities to work with owners.



Discovery

- Identify business owners already in your book
- Listen for other owners mentioned in meetings with current clients (ex: “my client”, “my colleague”, “my partner owns a business”)
- Show your capability to deliver clarity seamlessly
- Ask satisfied clients for referrals to owners similar to them
- Use RISR examples and insights to position your expertise with those referrals



COI Engagement

- Lead with clarity: “Here’s the insight I can bring to your clients”
- Show COIs how quickly you can surface valuation, risk, and strategy gaps
- Offer to support their conversations with owners they already work with
- Use Business Insights or valuation summaries as value-forward conversation starters



Owner Outreach

- Use valuation examples, risk insights, and strategy workflows to warm up outreach
- Begin with simple, curiosity-driven prompts (“Owners typically ask...” / “Here’s what we often uncover...”)
- Position the 15-minute intake as a low-lift starting point
- Reinforce that clarity on the business is the missing piece in their strategy

You don't need to reinvent your practice to work more deeply with business owners. Start the conversation, RISR insights and deliverables will help you take it from there.

Business owners want clarity, confidence, and direction – and financial professionals are uniquely positioned to give it to them. When you combine your strategic expertise with RISR's business insights, you create conversations that owners rarely experience: conversations anchored in their goals, supported by data, and focused on what truly matters most to them.

The scripts, workflows, and positioning tools in this playbook are designed to help you start those conversations with ease. Whether you're meeting with an owner for the first time, re-engaging a past client, or building relationships with COIs, leading with insight creates momentum and opens the door to deeper strategic opportunities.

RISR gives you the visibility to guide owners across wealth, risk, exit, and tax strategy – and it empowers you to show how their business fits into their life plan with clarity and simplicity. When used consistently, it becomes the foundation for a stronger relationship and a more confident path forward for your clients.