



SOBEL & CO. LLC

CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

Value Intelligence (VI)

The Valuation, Strategy and Litigation Support Group is excited to announce the launch of our new service—Value Intelligence (VI) - which offers a suite of three services.

Financial Intelligence (FI) provides business owner/operators, shareholders, boards of directors and C-suite executives the value of the business, a summary of the strengths and weaknesses that drive value and both short and long-term solutions for value creation. Equipped with this information, the C-suite executive can solicit smart money for growth, make informed decisions around the deployment of capital and exploit the drivers of value in their business. Additionally, this understanding of value helps to ensure the executive is well positioned for an exit event.

Business Intelligence & Performance Management (BI) provides C-suite executives with the ability to leverage their existing data while harnessing the power of business analytics. We introduce the client to the importance of alignment between their strategy and operations. We will present the client with the Key Performance Indicators (KPIs) that are drivers of value and are truly relevant to their operation. More importantly, we will go beyond the traditional application of KPIs and financial intelligence. We will expand the conversation to illustrate to our clients how changes in KPIs affect value. The BI service also provides executives and managers with tools that include the creation of Balanced Scorecards and in-depth benchmarking studies. This distinctive approach will go well beyond simply identifying best practices in order to identify their relationship to value creation.

Strategic Intelligence (SI) provides the client with access to strategy formulation services. If we think of the BI service as "finding the dots," the SI service "connects the dots." The SI service line is meant to answer the question "Is our strategy working?" SI engagements will typically be cross-functional with other areas of Sobel & Co., offering C-suite executive access to the intellectual capital of the firm in an efficient and formalized deliverable. SI is an essential collaborative tool for solving critical business questions.

We believe that this suite of three services forms the foundation for any client's valuation, performance management and strategic advisory needs.

Note, the VI service is not meant for use in IRS or state tax matters, commercial litigation or actual deal negotiation. Our existing suite of valuation services continues to satisfy these client needs.

For more information or a gratis
consultation please contact:

Chris Young or Jeff Sisco (973) 994-9494

Sobel & Co. LLC

293 Eisenhower Parkway, Livingston NJ 07039
www.sobel-cpa.com