

TOP FIVE TIPS FOR

Finding Your Place in the Marketplace



From Amy Wirtz, the 2024 Exit Planner of the Year



As many of you know, business consulting was the next chapter in my career because, after twenty-five years, I was bored with being a family lawyer. I needed a business plan, which included identifying my ideal client.

When I thought about who I wanted to work with I started with comfort and culture. I have an affinity for agriculture because I grew up in a rural area. I wanted to work with others who value our environment, come from family businesses, and tend to be hardworking humble business owners. I knew the businesses had to be able to pay for my services, needed complex planning, and would welcome education. My goal was to never bill by the hour again and work towards a flat fee basis. As I experienced, after you receive your Certified Exitting Planning Advisor (CEPA®) designation it takes about a year to figure out where you want to play in the world of CEPA and exit planning.

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TIP ONE:

You will have to be able to explain what your role is in our process before you market your services.

Are you going to be a value enhancement advisor, part of the legal team, help with tax planning, or maybe work with investment strategies? Remember you came to this program with experience and knowledge. Do some self-evaluation on what you are good at, what you enjoy, and who you want to work with at what stage of our processes. My talents coming to this work were being a good communicator, conflict management, knowledge of valuation, and experience with project management. I found family business advising while attending an EPI Summit and that began the path where I am currently. Where you sit in the team will help you define your place in the marketplace.



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TIP TWO:

Educate your existing referral base about your new credential.

Show them how the value acceleration methodology works and how it will make them look brilliant. I began networking with lawyers and accountants who knew and trusted me. I educated them on our processes and asked for referrals to business owners within the agricultural space. I primarily work with farmers and agriculture support businesses. This network led me to my first board of advisor role for a large farm in Northwest Ohio.

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TIP THREE:

Leverage two key approaches to engage business owners. Understanding how to effectively connect with business owners is critical to your success in exit planning.

There are two primary strategies to get owners in front of you:

- ♥ **DIRECT OUTREACH:** Market directly to business owners through targeted campaigns that speak to their unique needs, challenges, and goals in the exit process. Build credibility and trust by positioning yourself as a vital resource, then collaborate with their trusted advisors—such as financial planners, accountants, or attorneys—to create a seamless and comprehensive exit strategy.
- ♥ **GO WHERE BUSINESS OWNERS ALREADY ARE:** Rather than relying solely on outreach, find opportunities to engage with business owners in environments they naturally gravitate towards. This can include industry conferences, business associations, networking groups, or partnerships with organizations they trust. By embedding yourself in these spaces, you can become a trusted figure within their network, increasing your visibility and approachability when the time comes for exit planning discussions.

This dual approach ensures that you're either pulling business owners toward you or meeting them where they already feel comfortable, expanding your opportunities to build valuable relationships.

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TIP FOUR:**Co-create owner-facing educational events.**

My first attempt at this was in 2015 and was created by working with a local law firm that served many closely held business owners. We did a breakfast and coffee event for two hours and introduced them to the value enhancement process. We only got 15% of those invited to attend and it was a huge lift to my business as I was the only CEPA on the team. Because of the evolution of the Exit Planning Institute, CEPAs now have more resources than ever to create owner-education-focused marketing events. Now, EPI is rolling out an owner education program to help create educated consumers who know that they need to seek out your services via DriveValue.com. Additionally, the EPI Chapter Network is working together to launch owner events (i.e. Business Owner Forums). Get involved and look for local ownership-focused events to sponsor and speak at.

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TIP FIVE:**Ask your clients, friends, vendors, and advisors if they have connections with the education directors for their industry trade associations.**

The owner of one of my first farm businesses introduced me to his contacts with Farm Journal who agreed to have me speak at their largest convention in Chicago, IL. I spoke at their national convention and from there I used that as a launching tool for local agricultural trade associations. A conversation with my marketing consultant introduced me to the RV Park and Campground industry. That introduction opened doors to their national trade association and state trade association conventions. Every time I spoke at one of these events, I got an engagement. If you have an existing book of business that you are introducing to the value enhancement process, then examine what industries the businesses reside in. Is there a concentration of dentists, commercial real estate, manufacturing, or mining? They all have industry events that you can speak at.

A QUICKLOOK AT THE

Top Five Tips for Finding Your Place in the Marketplace

Define Your Role in the Process

- Identify your strengths, expertise, and what you enjoy doing.
- Determine where you fit within the exit planning team: value enhancement, legal, tax planning, or investment strategies.
- Reflect on your ideal clients and the stage of the process where your skills are most valuable.

Educate Your Referral Network

- Inform existing contacts (lawyers, accountants, etc.) about your CEPA credential and its benefits.
- Demonstrate how the value acceleration methodology enhances their services and builds trust.
- Request referrals to business owners within your target industry or niche.

Engage Business Owners Strategically

- Direct Outreach:** Use targeted campaigns to address owners' unique challenges and collaborate with their trusted advisors.
- Go Where They Are:** Attend industry events, conferences, and networking groups where business owners naturally gather.

Create Owner-Focused Educational Events

- Collaborate with other professionals to host events that introduce owners to the value enhancement process.
- Leverage resources from EPI, such as the DriveValue.com platform or Chapter Network events, to boost your credibility and reach.

Leverage Industry Trade Associations

- Use your network to connect with education directors in relevant trade associations.
- Offer to speak at industry events and conventions to build authority and secure engagements.
- Focus on industries where you have existing experience or where your expertise can provide significant value.

MEET AMY WIRTZ

2024 EXIT PLANNER OF THE YEAR

Amy Wirtz is a senior consultant at The Family Business Consulting Group, focused on helping families define their purpose, values, and ownership goals. She guides families in creating governance structures like family offices, councils, and enterprise systems. Amy uses her background in law, mediation, and education to make complex concepts easy for families to understand and implement. She believes in educating families on support options and helps them develop aligned implementation plans. Additionally, Amy speaks at business forums and serves on several advisory boards, contributing her expertise in family business systems and governance.

CONNECT WITH AMY AT

 [linkedin.com/in/amywirtzcepa](https://www.linkedin.com/in/amywirtzcepa)

 exit-planning-institute.org/member-detail/amy-wirtz

