

HOW RENEE RUSSO UTILIZES BOTH EOS® AND HER CEPA® CREDENTIAL TO PROVIDE IMMENSE VALUE TO BUSINESS OWNERS



TITLE

CEO & Founder

COMPANY

Rise Up Business Coaching

CEPA® SINCE

2022

The Exit Planning Institute® community is comprised of a large variety of professional advisors from across the globe. There are over 4,000 Certified Exit Planning Advisors® in the marketplace currently helping business owners build value in their companies prior to exiting.

What is a CEPA®?

The Certified Exit Planning Advisor (CEPA) credential is for professional advisors who want to effectively engage more business owners. Through the process of Exit Planning (the Value Acceleration Methodology), owners can build more valuable companies, have stronger personal financial plans, and align their personal goals. Earning the CEPA® credential doesn't change your expertise, it enhances your ability to engage business owners and conduct value-added conversations around growth and exit.

Learn how CEPA, Renee Russo, is utilizing her exit planning expertise in her practice, and how the CEPA credential has helped to expand her practice and thought leadership in the exit planning space.

Meet Renee Russo

Renee Russo helps business owners get unstuck and realize their freedom. As a Certified EOS Implementer®, she uses the Entrepreneurial Operating System to help owners gain control of their business, drive value, and elevate out of the day-to-day operations. As a Certified Exit Planning Advisor®, she uses the Value Acceleration Methodology to help owners learn how to think like an owner and align their personal, financial, and business goals so they can unlock their wealth. As the Founder of ASCENSION Life Coaching System, she helps owners master a simple and proven system for personal planning and energy management, empowering them to reclaim control of their journey and realize their personal freedom.

Prior to Becoming a CEPA

Renee has been working with business owners for over two decades. She began her journey at KPMG, as a mid-market advisor specializing in insolvency and transaction services. There she discovered her passion for owner-operated businesses. Renee shares, “I became obsessed with understanding how they functioned and how they could perform even better, at any stage of growth and market cycle.”

She shifted her career focus from numbers to filling the talent gap in businesses. She explains, “My time as a recruitment specialist taught me the importance of understanding and harnessing the human energy in an organization – this, I believe, is the most important lesson any business owner can learn.”

Renee earned her credential as a business optimization coach using the Entrepreneurial Operating System (EOS), and utilized EOS on her own business as a testing ground. She expands saying, “EOS worked so well in optimizing our

operations and giving us our lives back, that I realized I wanted to devote myself to helping other business owners achieve the same freedom.”

What Inspired Renee to Become a CEPA?

Renee wanted to help her clients further their business successes and realized that few had any idea about exit planning or did not understand the importance of implementing an exit strategy. She explains, “I sought out the Exit Planning Institute, in search of answers and knowledge to bridge that gap. But what I discovered was so much more than just information. I found a simple, practical, and proven system that not only helped business owners gain control of their value-creation journey but also aligned their goals with their personal and financial aspirations. It was a life-changing realization, and I knew I had to become a Certified Exit Planning Advisor (CEPA) to fully support business owners on their path to freedom.”

An “Aha Moment” When Completing the CEPA Program?

As an EOS Implementer, Renee has utilized simple, practical, and proven systems before in her work and noticed remarkable results. In the CEPA program, she gained another system, the Value Acceleration Methodology, that allows her to help her owner clients even further.

Renee shares, “My ‘aha moment’ during the CEPA program was when I realized that there was a similar methodology, a system if you will, for helping business owners fully step into the owner’s box, control the value creation process, align their goals, and ultimately achieve the freedom they desired. The Value Acceleration Methodology is so powerful, and it has transformed the way I approach exit planning.

It's all about harnessing the power of the system and guiding business owners through their journey of realizing their dreams."

How Does the CEPA® Program Compare to Other Credentials?

Unlike most credentialing programs that take months to complete, the CEPA program is a one-week course with a single three-hour exam. This allows for advisors to earn their credentials and begin immediately implementing the knowledge into their practices.

Renee shares, "Honestly, the CEPA program checked all the boxes for me. The course offers thought leadership, practical tools, and most importantly, a proven system that I can confidently leverage to bring immense value to my clients. The content was rich and informative, and it provided me with the knowledge I needed to excel in my role as an exit planning advisor."

Another differentiating factor in the CEPA program is the vast and interconnected network of advisors, thought leaders, and exceptional faculty the CEPA candidates have access to throughout their journey with EPI. Renee highlights, "Just as importantly, what truly sets this course apart is the engaged community of fellow professionals. The connections I've made and the collective pool of wisdom and experience have been invaluable. Overall, the investment of time and money into the CEPA program has been more than worth it for me."

Practice Improvements Since Earning the CEPA

In the year since earning her CEPA credential, Renee has seen vast improvements in her practice. She shares that the education she gained from the CEPA program has allowed her to provide even more value to her clients and they notice the measurable impact on their own businesses.



6 New Clients Onboarded



10% of Total Client Base is now running simultaneously on EOS and Exit Planning Strategy Elevated Market Presence

Renee expresses, "Many of my clients choose to work with me because I can now optimize their business operations, maximize their business's value potential, and align their business, financial, and personal goals."

Renee shares two examples of clients who have benefited from the knowledge she gained from completing the CEPA credentialing program. Once she went through the Value Acceleration Methodology with these clients, one decided to sell their business and the other went into the advanced value growth stage and continued to build value in their company.

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Decide Gate: Sell

One client embarked on a four-year journey with Renee, first implementing EOS and then expanding into exit planning. Through their work together, they created a comprehensive exit strategy, made key hires, established a professional service team, and executed a go-to-market plan. Renee has been coaching him through the transition, and she shares it has been incredibly rewarding to see the progress and impact they have made together.

Decide Gate: Grow

Another client also went on a four-year EOS journey with Renee. In addition to creating an exit strategy, they initiated growth by acquisition to align with the owner's financial and personal goals. Renee is currently guiding him through the transition and says it is exciting to witness his journey toward realizing his vision.

How To Effectively Utilize Your CEPA®

After earning their CEPA® credential, many advisors ask the following questions:

How do I monetize this?

How do I implement this knowledge into my practice?

What market is best for me?

How do I share my new CEPA® credential with my network?

How do I monetize this?

As a CEPA, several different paths can be employed for monetization. These answers can vary depending on individual practice regulations and advisor type. Some advisors are unable to charge explicitly for “exit planning” services, but the holistic education provided in their CEPA program can be utilized to offer more than just comprehensive financial advice.

Renee shares that her approach follows a proven process with three key stages: Educate, Enable, and Elevate. She begins by offering a business insights report, which provides owners with deep insights into the attractiveness and readiness of their business for a transition. This report is a pay-to-play opportunity for owners to gain valuable knowledge about their business.

Renee explains, “Following that, we enable them with the right solutions to gain fast ROI. Depending on where the owner is at in their journey, these could include EOS Implementation, Advisory Board development, Value Creation Engagement, and Life Coaching.”

Every quarter, Renee and her team explore ways that they are helping the client move toward their goals and look to fulfill additional needs in line with their readiness. Their solutions range from monthly ongoing engagements to project-based opportunities to create extreme value.

How do I implement this knowledge into my practice?

As an EOS® Implementer, Renee was used to incorporating a system into her business and her clients' businesses. She shares, "For me, the key to implementing the CEPA credential into my practice was to understand how it aligned with and elevated my existing core practice of EOS Implementation. By appealing to the business owners I worked with and helping them understand how EOS can unlock the value of their intangible capital value drivers, as well as improve their financial performance, I was able to overcome barriers to adoption. Initially, the idea of running value acceleration engagements seemed overwhelming. However, I discovered the power of technology as an accelerator, drawing inspiration from Jim Collins' book, *Good to Great*."

What market is best for me?

The Certified Exit Planning Advisor Credentialing program has a strong focus on lower-middle market businesses. This market includes businesses with between \$5 to \$100 million in annual revenue. Renee has found great success in the small to lower-middle market segment with revenue between \$5 and \$200 million. By focusing on the lower-middle market businesses, as taught within the CEPA Credentialing program, Renee understands the unique challenges and opportunities that these businesses face during their exit planning engagements.

Renee expands on her target market's psychographics, stating, "We aim to work with owners who possess a unique combination of humility, hunger for growth, and a readiness for change. They understand that the strategies that got them here will not get them where they want to go. These owners often feel stuck, lacking control, and overly invested in their businesses. They are acutely aware of the risks associated with not protecting and preparing their business for a successful transition."

How do I share my new CEPA credential with my network?

Renee understands the importance of a strong brand and a fully integrated digital marketing strategy. CEPAs are viewed as thought leaders and experts in the exit planning field, and Renee fully capitalized on her credential in her marketing efforts.

She shares, "My team and I swiftly moved into digital marketing efforts to celebrate and magnify the message of this new offering. We wanted to establish ourselves as a trusted authority on all things related to setting business owners free. By leveraging digital platforms, we created a voice of authority and reached our target audience with impactful messaging."

As an EOS® Implementer, she wanted to ensure that her current clients and any potential clients finding her from her EOS expertise were aware of her new CEPA® Credential as well. Renee says, "We also adjusted our connector conversation to align with this new credential. It was important to communicate the value and benefits of our CEPA services to our community in a way that was clear, easy to remember, and resonated with their needs."

Are You Interested in Becoming a CEPA?

Renee strongly recommends the CEPA program for other advisors looking to expand their knowledge on exit planning. The CEPA program gave Renee the tools and language to help owners work through the exit planning process. She shares the CEPA program made her more valuable to his business owner clients.

Renee says, "If you're working with business owners in an advisory capacity, it is your duty to educate them about the importance of planning for their transition, protecting their wealth, and prospering at every stage of their journey towards realizing their freedom. By becoming a CEPA, you gain access to a designation, an extensive resource library, and an experienced community that can support and elevate your practice. With these resources, you can quickly step up and deliver more meaningful engagements with business owners, helping them achieve what they truly want in both business and life."

The Certified Exit Planning Advisor credential is for those advisors who want to expand their expertise and differentiate themselves from the competition.

- Differentiate yourself from the competition
- Gain better access to business owners
- Become more engaged on a business owner's advisory team
- Have deeper and more holistic conversations with business owners
- Grow your referral network of professional advisors
- Access hundreds of marketing and business development tools tailored for owners

Learn more about the CEPA® program and become your client's Most Valued Advisor today!

www.EarnCEPA.com

