

Successful Chaos

The Key to Prospecting Business Owners



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How I Built a Practice Serving Business Owners

What I Learned. • What I Got Wrong. • What You Can Steal.

**“That’s not a problem.
That’s a door.”**

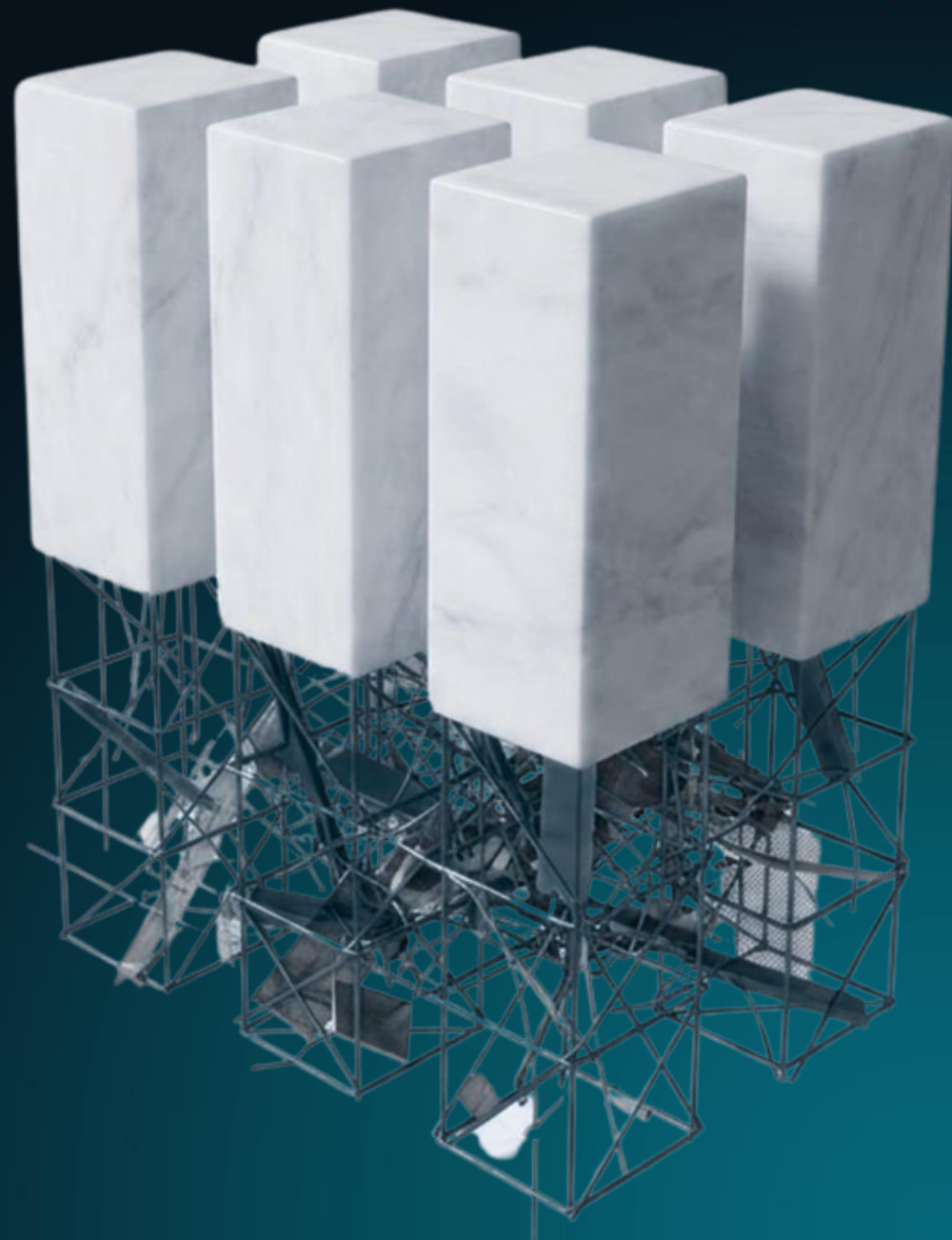
“Next time I see you, I’ll tell you how the triple double worked out.”

4 doubles. Working on the fifth.

What is Successful Chaos?

Four entrepreneurs.
\$50M+ combined revenue.
Not one defensible valuation
between them.
Nobody coordinating
anything.

Successful on the outside.
In chaos behind the scenes.



Successful Chaos™

The default state of business
that got built by doing the work.

The same instincts that built it
become the thing that keeps it
fragile.



02

Pick Your Lane



01

**Lane 1:
The Connector**

Stay in your lane.
Refer. Wait for the
liquidity event.
Manage the wealth.

02

**Lane 2:
The Hub**

One throat to choke.
Coordinate every
advisor. Own the
whole picture.

03

**Lane 3:
The Specialist**

Go deep on one role.
Exit planning, tax
strategy, succession.
Own your piece.

The wrong approach isn't picking the wrong lane. It's not deciding.

Inventory Your Book

Open a spreadsheet. This week.

Industry	Approximate revenue	Years in business	What you're doing for them personally

Now look at the list. What do you see?

“I’m thinking about serving more business owners like you. What are you hearing from your peers? What do they wish their advisors understood better?”

Now look at the list. What do you see?

04

Build Your Target List

What drives 60% to 70% of business value at exit



The financials are the other 30% to 40%.

“What keeps competitors from taking your customers?”

Most business owners have never been asked this.
A buyer will ask it on day one.

**Successful Chaos
is fixable.**

~~Unsuccessful
Chaos is not.~~

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The First Conversation

"Not a sales call. I genuinely want to understand what's frustrating you right now."

9 out of 10 will say yes.



Listen for this:

"My advisors give me great advice. Nobody coordinates it. Nobody does the work."

That's your person.

"What if we just did it for you?"

Today: \$6,000 to \$20,000/month

Started: \$2,000/month



**We got there
by proving
the value first.**

What You Need to Make This Work

A Team

You cannot run this alone.

A Strategic Network

CPAs, attorneys, bankers who specialize in business owners. Not individuals who occasionally see one.

Technical Expertise

This market rewards depth. Know WIP accounting. Know bonding. Know a buy-sell.

7 Mistakes

So you don't have to make them.

7 Mistakes



What You Can Do Today

Action Items

✓ Open your client list.

✓ Find three business owners.

✓ Ask one question: "What's the **hardest part** of your business right now that no advisor has helped you solve?"

Questions?

Please **raise your hand** and wait for the microphone to be brought to you **before** asking your question.





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“FORCE MULTIPLIERS”