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## Template

1<sup>st</sup> Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
2<sup>nd</sup> Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
3<sup>rd</sup> Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
4<sup>th</sup> Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
5<sup>th</sup> Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**Note:** Like any consulting engagement, you want to know what value you receive for the dollars you are paying. Price is only one component of the overall value proposition that a firm should be delivering. These questions may seem like an interview; because it kind of is.

**State your reason for calling:** These questions will allow the firm to answer honestly.

“I am calling to place a bid for a business valuation.”

1. What valuation credentials do your appraisers hold?  
*(Reference the above credentials; Section 3.4)*
2. Does your firm specialize in any specific types of valuations?  
*(Do these match your needs?)*
3. What percentage of time does your firm spend performing business valuations?  
*(You want an experienced expert, not a firm that says they “do valuations”)*

**State your purpose:** “I need a business valuation specifically for/because \_\_\_\_\_.

1. Will I need a full report for this valuation?  
*(Some valuations may require a report, such as for gifting, whereas others do not)*
2. How long will it take to complete a business valuation for my particular need?  
*(Timing may depend on a firm’s current case load, experience, and type of valuation)*
3. How much will this valuation cost?