

SUCCESS STORY

THE CAPITALIZ ADVANTAGE

Business coaches like Renee Russo, an Expert EOS™ Implementor and Certified Exit Planning Advisor (CEPA™), leverage the comprehensive Capitaliz platform to deliver best-in-class exit planning engagements that:

- Clarify and centralize owner goals and vision
- Build structure and discipline with accountability
- Develop a cohesive, aligned team of advisors
- Create a prioritized action plan that accelerates business value

CLIENT SUCCESS CASES

Client 1:

Navigating Value & Transaction Partnerships

One of Renee's clients utilized the Capitaliz Business Insights Report (BIR) to gain a clear understanding of business value and value potential. These insights allowed the client to negotiate effectively for what they wanted and engage the right transaction partner ahead of sale.

The structured approach provided by Capitaliz ensured the client was well-prepared to face potential buyers, leading to a successful engagement. This work helped them move through the Discover and Prepare Gates of the Value Acceleration Methodology™, and into the Decide Gate with clarity, confidence, and the data to back up the value of their business.

Client 2:

Restoring Control in Crisis

Another client faced a critical situation - a business that was not aligned and owners experiencing distress - both threatening the stability of their family business. By applying Capitaliz platform features, which work hand-in-hand with the Exit Planning Institute's Value Acceleration Methodology™, Renee guided the owners back to a position of control, clarity, and alignment on their path to harvest their wealth and realize their freedom.

The customized growth roadmap in the Capitaliz software not only alleviated immediate crisis, but instilled a sense of calm and strategic focus, empowering the owner to make informed decisions and pivot as needed.



RENEE RUSSO

Founder and CEO,
Rise Up Business Coaching

Expert EOS™ Implementor
Certified Exit Planning Advisor (CEPA™)



“At Rise Up Business Coaching, we use Capitaliz to create value for business owners.

When we create value,
we create choices.

When we create choices,
we create freedom.”

-Renee Russo



ENGAGEMENT STRATEGIES

Renee engages clients using the *90-day Exit Wise Program*, which covers:

- Owner Outcomes & Discovery
- Formal Business Valuation and Assessment
- Personal Visioning & Goal-Setting
- Prioritized Action Planning

After 90 days, Renee's clients transition to a monthly engagement that helps them to **relentlessly execute with accountability to achieve their business and personal goals.**

PRICING MODEL

Renee employs a unique pricing strategy through the *Exit Wise Program* that **reflects the value delivered through Capitaliz.**

First 90 Days: Upfront “*triggering event*” fee: **\$15,000**

Includes:

- Presentation of the Capitaliz Business Insights Report
- Onboarding & Priority Setting
- Implementation Roadmap

Following 90+ Days: Monthly fee: **\$5,000**

Includes:

- Ongoing coaching through the Capitaliz 21-Step Framework
- Data room and measurable value growth

FROM INSIGHTS TO VALUE

The Capitaliz Business Insights Report serves as the ultimate *triggering event*. It is designed to organically lead clients toward the use of the project management and value acceleration features in the platform - implementation roadmaps, dynamic revaluation, and more. Easy integration allows for coaches like Renee to streamline efforts & demonstrate value.

Capitaliz for Coaches

Book some time with our team at capitaliz.com/get-started or reach out directly at info@capitaliz.com to explore how Capitaliz can help scale your business and drive opportunities for coaches.

CREATE VALUE
CREATE CHOICES
CREATE FREEDOM

Capitaliz

THE IMPACT

COACHES THAT USE CAPITALIZ CAN:

- Centralize Goals & Vision
- Consistently Track Value Enhancement
- Collaborate with Accountability
- Engage Using Data & Proven Methodology



MORE ON RENEE

In addition to her role as CEO and Founder of Rise Up Business Coaching, Renee also holds the following roles:

- Accredited Capitaliz Advisor
- Expert EOS™ Implementor
- Certified Exit Planning Advisor (CEPA™)
- Author of *Ready to Rise*
- Keynote Speaker
- Member of EPI's Thought Leadership Council
- 2025 Nominee for EPI's Thought Leader of the Year
- Founder of the 'Exit Mentor' Peer Group Program



Capitaliz