

# Opportunity & risk scorecard

Are you ready for the next disruption, or are you at risk of falling behind?  
Answer below to uncover opportunities to advance your position.

## ARE YOU AT RISK?

A solution  
is in place

Currently  
considering

Plan to  
consider

Not  
considering

Enterprise risk management (ERM) program

Well-documented & frequently reviewed internal controls

Robust cybersecurity processes & procedures

Companywide strategy for collecting,  
accessing, analyzing, & protecting data

Data-driven decision-making capabilities

A predictive & prescriptive business analytics solution

Companywide staff development &  
leadership pipeline plans

Documented & practiced company culture

Succession planning for key roles

Attractive tax structure/entity type for potential buyers

Up-to-date or leading-edge technology companywide

Identified value drivers and risk factors, and plan  
to mitigate

LOW RISK HIGH RISK

### RISK MANAGEMENT

*Want to mitigate risk  
and realize value?*

### DATA STRATEGY

*Ready to transform  
your data into action?*

### RECRUITMENT & RETENTION

*What does it take  
to keep top talent?*

### SALE & TRANSACTION READINESS

*How can you maximize  
value for a strong exit?*

# Risk management

Every business activity comes with a certain amount of risk, and your success depends on mitigating it. Do you know where you're exposed?

*By uncovering areas of unnecessary exposure — from failing to insure new business segments to granting data access to staff without cybersecurity training — we help you secure every area of your business to avoid critical disruptions.*

*You've heard the horror stories — don't wait to react to threats until after the damage is done. With tools like enterprise risk management and well-documented (and followed) internal controls, you can prevent fraud, data loss, compliance failures, and devastating financial mistakes before they happen. A flexible, proactive plan can also help you more seamlessly manage changes to your business environment like the ones we're facing now, without overexposing yourself.*



Enterprise risk management guidebook

What does successful enterprise risk management look like?



# Data strategy

Are you using your data to make informed decisions?  
If not, you're flying blind.

*Collecting data is one thing. But you need a strategy for making use of it, or else you'll find yourself drowning in it. While analytics programs are challenging to build, without one, you could be leapfrogged by your data-driven competitors – it's time to start making your data work for you.*

*A comprehensive data strategy requires consistent methods for collection, high standards for data quality, and a method for easily putting it to use. When you start using data to make decisions, you'll make decisions more confidently and easily, and see positive change in your business. A data strategy partner like us will show you the way.*



Growing  
into business  
analytics

Where are you  
in your business  
analytics journey?

# Recruitment & retention



Staffing seems to get more competitive every year.

*As happiness and personal connection to the work become considerably important to job-seekers, building a great culture has become a risk management strategy. A key factor of a great culture is an excellent staff development program and leadership pipeline that keeps high-performing staff in the organization.*

*Our talent and organizational development experts can help you accomplish this.*

*Recruiting and retaining top-level talent requires more than just a strong culture, though – you'll also need appropriate compensation. Our benefits and compensation consultants will help you build a best-in-class compensation package that's sustainable for your business and competitive in your industry.*



Surefire ways  
to attract,  
retain, and  
motivate talent

*Do you know what it  
takes to find – and keep –  
top performers?*



# Sale & transaction readiness



Preparing your organization for a sale and closing with maximum value takes time and foresight.

*The most attractive target organizations aren't just the ones with the strongest financial performance, it's those that laid the right foundation to take advantage of growth opportunities. This means making sure your people are well-trained, your processes are streamlined, and your technology is current if not cutting-edge. It also means your tax strategy is strong and accounts for common issues like revenue recognition, tax elections, and state and local tax compliance.*

*When considering a sale, establish a relationship with an advisor early. They can help you avoid common pitfalls, craft your growth story, close the deal with maximum after-tax proceeds, and more. We have the experts and experience to help you with every piece.*



Preparing  
your business  
for a sale

*Are you ready to exit  
your business?*



# Ready to advance your position?

Subscribe to Plante Moran Perspectives, where our experts regularly share their best guidance to help you minimize risk and maximize growth opportunities.