v.1.3

nReach Agency Advisor

🚀 Manual

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👋 Welcome & Introduction

Welcome to the nReach Agency Advisor Manual—a comprehensive, practical guide for founders and investors. Use this manual to:

- Understand every workflow and capability
- Simulate valuation, readiness, and buyer fit with confidence
- Prepare your agency for growth, scale, and exit—confidentially

nReach Agency Advisor leverages the latest sector benchmarks, AI diagnostics, and operational insight to support you at every stage.

🧠 What Is nReach Agency Advisor?

nReach Agency Advisor is an AI-powered, pre-advisory tool for Amazon agency owners and investors. It allows you to:

- Simulate valuations (simple to advanced)
- Score exit readiness
- Compare buyer fit and deal structures
- Build actionable roadmaps to increase value and prepare for exit

Built for:

- Owners preparing for exit or M&A
- Investors evaluating targets

All results are scenario-based and confidential—no data is stored or shared.

🔀 How It Works: Modes & Paths

nReach Agency Advisor is built for flexibility and precision, offering multiple "Paths" (core analysis tracks) and three "Modes" (interaction depths) to suit different user needs and stages of agency maturity.

Core Diagnostic Paths

- **Valuation**
  Calculates your agency's worth based on your financials, operational maturity, market benchmarks, and buyer types.
  - **Outputs:** Value range, key drivers, risk flags, comparison to industry norms.
  - **Best for:** Exit planning, investor meetings, annual planning, or periodic check-ins.
  - **Example:** An owner with $3M in revenue, 20% EBITDA, and moderate SOPs can instantly see their value range and what's holding it back.
- **Readiness**
  Evaluates how prepared your agency is for a potential sale or exit, scoring your operations, documentation, team structure, client mix, and owner dependence.
  - **Outputs:** Readiness score (0–100), strengths & weaknesses, action checklist, and timing recommendations.
  - **Best for:** Founders preparing for exit, aiming to build value, or wanting a "due diligence health check."
  - **Example:** A founder gets a 65/100 readiness score and a roadmap to improve documentation and reduce owner tasks, raising their attractiveness to buyers.
- **Buyer Comparison**
  Compares how different types of buyers (Strategics, Private Equity, Aggregators) would view your agency, highlighting what matters most to each.
  - **Outputs:** Buyer fit matrix, strategic value drivers, key "fit" issues for each buyer, and actionable steps to broaden buyer appeal.
  - **Best for:** Owners targeting specific buyers, investors weighing exit options, or agencies looking to align with premium buyers.
  - **Example:** Your agency scores highest for aggregator buyers, but could unlock a higher multiple with a few operational changes to attract strategics.

Modes of Interaction

- **Quick Mode**
  - **Description:** Minimal input, default settings. Get an instant valuation or readiness check using averages and conservative assumptions.
  - **Use cases:**
    - Rapid "back-of-the-envelope" calculations

        - First-time users exploring the system
        - Executives seeking fast boardroom answers
    - **Commands:**
        - `run valuation`
        - `score my readiness`
        - `compare buyers`
    - **Tip:** Try Quick Mode first, then re-run your scenario in Standard or In-Depth for more detail.
- **Standard Mode**
    - **Description:** Guided prompts with explanations, recommended inputs, and context. Balances speed with customization.
    - **Use cases:**
        - Benchmarking your agency against market norms
        - Running "what-if" scenarios (e.g., if you improve client retention or add automation)
        - Side-by-side comparisons for investor or buyer presentations
    - **Commands:**
        - `run valuation`
        - `build roadmap`
        - `show dashboard`
    - **Tip:** Use Standard Mode for realistic projections or when working with advisors and team members.
- **In-Depth Mode**
    - **Description:** Full diagnostic. Includes advanced metrics, scenario modeling, risk assessment, and optional custom variables.
    - **Use cases:**
        - Pre-diligence before engaging a broker or buyer
        - Deep-dive on operational bottlenecks or integration risks
        - Investor due diligence, target agency audits
    - **Commands:**
        - `exit readiness check`
        - `build roadmap based on my readiness score`
        - `compare buyers`
    - **Tip:** Use In-Depth Mode to identify every lever for value creation and risk mitigation. Ideal before a major transition.

Switching Paths or Modes

- You can change your path (e.g., from Valuation to Readiness) or your mode (e.g., from Quick to In-Depth) at any time with the command `switch mode` or by simply describing what you want ("Now show me my readiness in depth.")
- Each mode and path preserves privacy and provides tailored outputs based on your selected depth and objective.

Practical Scenario Flow

1. **Quick Mode → Valuation:**
   "What is my agency worth?" (`run valuation`)
2. **Standard Mode → Readiness:**
   "How ready am I for exit?" (`score my readiness`)
3. **In-Depth Mode → Buyer Comparison:**
   "Who is the best buyer for my agency, and why?" (`compare buyers`)
4. **Switch Modes:**
   "Let's go deeper—show me advanced risk factors." (`switch mode` to In-Depth)

Tips for Maximizing Value

- Start simple—run Quick Mode to get oriented, then progress to Standard or In-Depth.
- Use "what if" commands to see how changing one factor (like SOPs or churn) affects value and buyer fit.
- Try multiple paths (valuation, readiness, buyer comparison) for a 360° view.
- Use exported reports for internal planning, investor decks, or broker conversations.

nReach Agency Advisor's flexible Paths and Modes let you tailor the experience for fast snapshots or detailed analysis—always confidential, always actionable.

🚦 Getting Started

Getting started with nReach Agency Advisor is designed to be frictionless—allowing you to see value in minutes.

Step 1: Define Your Objective
Decide whether you want to simulate a valuation, assess readiness, or compare buyer fit. Be clear about your current business goal (e.g., `What is my agency worth if I sell next year?` or `How prepared am I to exit?`).

Step 2: Select Role & Mode
Choose your role as Owner or Investor and pick your preferred interaction mode:

- Quick: For fast answers with defaults—ideal for first-time users or executive summaries.
- Standard: Guided input with explanations—great for benchmarking and side-by-side comparisons.
- In-Depth: Maximum detail and flexibility—ideal for power users, deal preparation, or scenario testing.

Step 3: Input Agency Data
Enter required information such as revenue, EBITDA, client concentration, automation maturity, and owner involvement.

- You can use your actual numbers or start with `sample data` for a risk-free test run.
- No data is saved—your session is private and temporary.

Step 4: Run Diagnostics
Let the Advisor process your inputs and deliver:

- Valuation range and analysis
- Readiness score and breakdown of strengths/risks
- Buyer fit comparison
- Clear, actionable roadmap (90-day, 12-month, or custom)

Step 5: Export, Reset, or Iterate

- Download a summary (`download summary`)
- Ask for a roadmap (`build roadmap`)
- Reset at any time (`reset`)
- Try `what if` changes to explore different growth or exit scenarios

Pro Tip: Run several sessions with different assumptions (e.g., higher retention, better automation, lower owner dependency) to see how small changes can drive valuation and readiness.

👤 User Personas & Typical Journeys

Owner Scenario 1: Growth-Stage Exit

- Goal: Plan exit in 12–24 months
- Actions: Runs valuation, tests readiness, benchmarks, builds roadmap
- Results: Value range, readiness score, action steps, buyer fit
- Example: Agency used nReach to identify SOP gaps, improved contract terms, and lifted exit value by 27% within 9 months.

Owner Scenario 2: Niche Specialist

- Goal: Premium valuation via specialization
- Actions: Complex valuation, what-if scenario tests, builds 18-month plan
- Results: Premium levers, fit with niche buyers, higher readiness
- Case: Boutique agency raised EBITDA by 15% after scenario testing recurring revenue and automation changes.

Owner Scenario 3: Early-Stage

- Goal: Fast snapshot and benchmark
- Actions: Quick mode, default assumptions
- Results: Instant value estimate, critical improvement flags
- Example: Small agency used quick mode to set quarterly focus on churn and documentation, leading to first buyer approaches within 6 months.

Investor

- Benchmarks and risk-assesses multiple agencies with side-by-side reports
- Runs `compare buyers` and `show dashboard` to make fast, objective decisions

🛣️ Detailed Walkthrough Example

Scenario: Agency Owner Prepping for Exit

1. Select `Valuation Simulator`
2. Input: $2.5M revenue, 21% EBITDA, 50% top 3 clients, Medium automation, Average SOPs, Medium owner role
3. Output: $4.3M–$5.1M value, 68/100 readiness, strong fit for strategics, roadmap: improve SOPs/owner dependency/recurring revenue
4. Next: Download snapshot, compare buyers, request roadmap, connect to nReach

Sample Output Dialogue:

```
User: Run a complex valuation for $2.5M revenue, 21% margin.
Advisor: Valuation range is $4.3M–$5.1M. Readiness is 68/100. Improve SOPs and owner dependence to
    lift value.
User: Show roadmap.
Advisor: Next 90 days—1) Finalize SOPs. 2) Reduce owner tasks. 3) Pilot recurring contract model.
```

💡 Tips for Best Results

- Start with `sample data`: If new, use this to safely explore every feature without exposing real financials.
- Iterate and Compare: Try different scenarios (e.g., higher SOP maturity, diversified revenue, reduced owner involvement) to see their impact on value/readiness.
- In-Depth Mode for Real Decisions: Use In-Depth mode when preparing for actual diligence or before a buyer/investor meeting.
- Reset Often: Begin each new diagnostic or scenario with a `reset` for clarity and focus.
- Review with Advisors: Always export and review major outputs with your M&A, legal, or tax professionals before making a move.
- Pay Attention to Red/Yellow Flags: nReach highlights urgent issues (e.g., high churn, client concentration) so you can act early.
- Leverage `build roadmap`: Use the automated roadmap output to plan operational improvements—these are proven steps from successful exits.
- Compare `buyer fit`: Not all buyers are equal. Use buyer fit tools to focus on the right suitors and avoid wasted energy.

🛡️ Guardrails, Privacy & Compliance

Absolute Confidentiality:

- nReach Agency Advisor never stores, recalls, or exports any user data or session input. All calculations and scenario modeling are performed in-memory, with data erased as soon as you exit.

Strict Educational Boundary:

- The platform is for simulation, education, and pre-advisory only. It is not a substitute for certified legal, financial, or tax advice. Outputs should always be validated with professional advisors.

No Hallucination or Guesswork:

- If the system cannot provide an accurate answer, it will tell you. No speculative or invented advice is ever output.

No Personal or Company Names:

- The Advisor will never output, reconstruct, or infer your company name, personal identifiers, or specific deal details.

Role and Topic Discipline:

- The tool only supports Amazon/digital agency growth, valuation, M&A, and readiness—not general business, legal, or unrelated topics.

Ethics and Compliance:

- nReach Advisor complies with GDPR/CCPA principles for privacy, never outputs investment advice, and always acts as a neutral, fact-driven system.

❓ nReach Agency Advisor — Frequently Asked Questions

Q: What if I enter the wrong data?
A: Type `reset` or "start over" to clear your session and begin again. No data is stored, so you can restart anytime.

Q: Is my data saved or shared?
A: No. All information you enter is private, processed in-memory, and wiped after your session ends.

Q: Can I get legal or tax advice?
A: No. nReach Agency Advisor only provides educational simulation. All decisions should be reviewed with certified legal, tax, and M&A professionals.

Q: Can I use this for non-Amazon agencies?
A: Yes, the logic adapts for digital, SaaS, or marketing agencies—just map your metrics accordingly. Results are most accurate for Amazon/digital models.

Q: What if I'm stuck, confused, or the output looks wrong?
A: Type `reset`, "help me start over," or use the FAQ. For urgent support, use `contact nReach`.

Q: Are the outputs binding?
A: No. All results are strictly non-binding, illustrative, and for pre-advisory planning.

Q: Can I download or export results?
A: Yes. Use commands like `download summary` or `save snapshot`.

Q: Can I view or download my session history?
A: No. Session data is erased for privacy. Export findings before closing with `download summary` or `save snapshot`.

Q: Can investors use this to compare multiple agencies?
A: Absolutely. Investors can run diagnostics on each target, compare results, and use `show dashboard` for insights.

Q: What information do I need to get started?
A: High-level financials (revenue, margin), client mix, and operational details (SOPs, automation, owner role). You may use sample data.

Q: Can I use this if I'm not planning to sell soon?
A: Yes! The tool is for both future planning and immediate exit prep. Use it to benchmark, strategize, or improve operations at any stage.

Q: Will using this affect my agency's confidentiality or trigger any external contacts?
A: No. The tool is confidential; nReach will never contact you unless you use `contact nReach`.

Q: How current is the market data?
A: The tool uses the latest available M&A and agency benchmarks, updated regularly.

Q: Can I get a human review or second opinion?
A: Yes. Use `contact nReach` for a confidential follow-up with an expert.

Q: What should I do if I have feedback or spot an error?
A: Use `contact nReach` to report issues or share suggestions. Your feedback improves the platform.

Still need help? Use `contact nReach` anytime for confidential support or guidance.

🧾 nReach Agency Advisor — Full Command & Prompt Reference

Valuation & Market Comparison

Command	Function	Example
`run valuation`	Launches the Valuation Simulator	`Run valuation for $3M revenue, 20% EBITDA`
`estimate agency value`	Calculates current agency value	`Estimate agency value with 25% margin`
`what’s my agency worth`	Returns an instant value estimate	`What’s my agency worth if I sell next year?`
`valuation diagnostic`	Performs deeper scenario-based valuation	`Valuation diagnostic with improved retention`
`compare to market`	Compares valuation to current market ranges	`Compare my agency to market averages`
`use sample data for valuation`	Runs sample case data for testing	`Use sample data for valuation example`

Readiness & Exit Preparedness

Command	Function	Example
`score my readiness`	Generates a readiness score (0–100)	`Score my readiness for exit`
`exit readiness check`	Runs full readiness diagnostic	`Exit readiness check for 2025`
`how ready am I to sell`	Provides summary of current preparedness	`How ready am I to sell my agency?`

`rate my agency for exit`	Rates operational and structural readiness	`Rate my agency for exit potential`
`show readiness persona`	Shows your agency's readiness profile	`Show my readiness persona`
`use sample data for readiness`	Tests readiness scoring using case data	`Use sample data for readiness test`

Strategic Planning & Roadmap Creation

Command	Function	Example
`build roadmap`	Creates a 90-day or 12-month plan	`Build roadmap based on my readiness score`
`scale to sell`	Outlines scale-to-exit roadmap	`Scale to sell over next 18 months`
`generate 12-month plan`	Builds one-year growth or exit plan	`Generate 12-month plan for higher valuation`
`exit plan for next 18 months`	Combines growth and timing planning	`Create exit plan for next 18 months`
`show me my roadmap`	Displays active roadmap or milestones	`Show me my roadmap progress`

Buyer Evaluation & Suitability

Command	Function	Example
`compare buyers`	Compares fit for Strategics, PEs, Aggregators	`Compare buyers for my agency`

`who should buy my agency`	Suggests most suitable buyer types	`Who should buy my Amazon agency?`
`strategic vs PE vs aggregator`	Explains pros/cons of each buyer type	`Strategic vs PE vs aggregator — which is better?`
`buyer fit diagnostic`	Runs detailed buyer-fit assessment	`Buyer fit diagnostic for my profile`
`rate buyer types`	Scores buyer alignment with your business	`Rate buyer types for my agency`

Timing & Risk Optimization

Command	Function	Example
`optimize timing`	Determines best time to exit	`Optimize timing for 2026 sale`
`should I exit now`	Runs timing and readiness sensitivity	`Should I exit now or next year?`
`exit window diagnostic`	Analyzes readiness vs market cycle	`Exit window diagnostic for 2025`
`market timing for sale`	Incorporates macro trends and buyer appetite	`Market timing for sale of Amazon agency`

Snapshot, Export & Session Utilities

Command	Function	Example
`save snapshot`	Saves current diagnostic state	`Save snapshot of my latest valuation`

`download summary`	Exports summary of results	`Download summary of my readiness report`
`generate PDF of results`	Produces printable output (if enabled)	`Generate PDF of results for investor deck`
`summarize my agency performance`	Combines valuation + readiness	`Summarize my agency performance`
`show summary`	Returns key diagnostic findings	`Show summary of my agency analysis`
`resume last`	Returns to last active session	`Resume last session`
`show dashboard`	Displays main dashboard view	`Show dashboard`
`email snapshot`	Sends exported summary by email	`Email snapshot to my inbox`

Clarifications, Educational Prompts & Explainers

Command	Function	Example
`explain my score`	Explains how readiness or valuation was calculated	`Explain my readiness score`
`how did you calculate this?`	Breaks down assumptions & formulas	`How did you calculate my valuation?`
`what is a good multiple?`	Provides industry-standard valuation multiples	`What is a good multiple for Amazon agencies?`
`define platform vs bolt-on`	Defines key M&A terms	`Define platform vs bolt-on acquisition`
`what is a quality score?`	Explains operational quality metrics	`What is a quality score?`

`what buyers want`	Lists top buyer priorities and deal drivers	`What buyers want in agencies like mine`
`why talk to Chris?`	Explains why to contact nReach directly	`Why talk to Chris from nReach?`

General Navigation & Utilities

Command	Function	Example
`switch mode`	Switches between Quick, Standard, or In-Depth modes	`Switch to in-depth mode`
`contact nReach`	Requests direct assistance from a human advisor	`Contact nReach about exit options`
`reset`	Clears session data and starts new	`Reset and start a new valuation`
`start over`	Alternative way to restart workflow	`Start over with new data`

✅ Notes & Usage

- All commands are **mode-compatible** (Quick, Standard, In-Depth).
- Commands can be phrased naturally: e.g., "Can you run a valuation using sample data?" works the same as `use sample data for valuation`.
- You can **combine** commands in sequence (e.g., `run valuation`, then `build roadmap`, then `compare buyers`) for a full strategic workflow.
- Every command runs in-session and maintains complete privacy.

📋 Input Field Glossary

- **Annual Revenue (TTM):** Trailing 12 months gross revenue. Primary input for valuation models and growth benchmarking.
- **EBITDA or Net Margin %:** Core profitability metric—higher EBITDA generally means higher value.
- **Addbacks / Adjustments:** One-time or extraordinary expenses to normalize profitability and reflect true earnings.
- **Buyer Type Preference:** Select whether your scenario targets strategic, private equity, or aggregator buyers.
- **Deal Stage:** Where you are in your exit or M&A process (early discovery, LOI, diligence, post-close).
- **Client Concentration (Top 3)**: Percentage of revenue from your top three clients—higher concentration is often higher risk.
- **SOP Coverage:** Quality of your Standard Operating Procedures, on a 1–5 scale. Strong SOPs support higher valuations and smoother exits.
- **Automation Use Cases:** List or select key business processes automated by AI/tools—signals operational maturity.
- **Owner Involvement:** Level of reliance on founder/owner (High/Medium/Low)—lower is better for buyers.
- **FTEs & Contractors:** Count and structure of your full-time and contract workforce—important for scale and integration risk.
- **Churn Rate**: Percentage of clients lost over a given period—low churn indicates retention and business stability.
- **Channel Mix:** Revenue split between Amazon and other channels—diversification reduces risk.
- **IP Ownership:** Whether the agency owns proprietary intellectual property (tech, trademarks, etc.).
- **Growth Assumptions:** Forecasted growth rates for scenario planning.
- **Exit Horizon:** Months to your planned exit or sale event.
- **Exit Scenario Preference:** Lean, moderate, or accelerated paths for growth and readiness.
- **Automation ROI:** Documented return (efficiency/cost benefit) from your automation investments.
- **Integration Factors:** Metrics and tags related to integration risk for a potential buyer.
- **Role Persona:** Specify if using as Owner or Investor for tailored outputs.
- **Case Study Tags:** Tag your agency by vertical or specialization for targeted scenario comparisons.
- **Buyer Archetype:** Type of buyer you want to simulate against—strategic, PE, aggregator.
- **Exit Objectives:** Personal/business goals shaping your exit strategy.
- **Mode Selection:** Chosen depth of interaction (Quick, Standard, In-Depth).

🟢 Quick Reference Cheat Sheet

Command	Function	Best For
`run valuation`	Launches valuation tool	Owners, Investors
`score my readiness`	Exit readiness score	Owners, Investors
`compare buyers`	Buyer fit matrix	Owners, Investors
`build roadmap`	Strategic plan	Owners
`show dashboard`	View scores/insights	Owners, Investors
`reset`	Start over	All users
`download summary`	Export results	Owners, Investors
`define [term]`	Glossary/explainer	All users
`contact nReach`	Human help	All users

📞 Need Help?

For advanced advisory support, **contact nReach**:
📧 **chris@nreach.com** | 🌐 **www.nreach.com**

⚠️IMPORTANT: nReach Agency Advisor is a pre-advisory, educational tool and does not constitute certified legal, financial, investment, tax, or accounting advice. All outputs are illustrative and educational only and should be validated by qualified professionals. AI makes mistakes.