

The Owner Call Process

Yan's structure, upgraded. What changed from v1: the call is now built around discovery instead of a pitch, every number in the intro is one the firm can stand behind, the seats carry their real names, and the compliance beats are inside the script instead of hoped for. The philosophy in one line: genuinely curious, relationship first, structured underneath, and authority built by asking better questions than anyone else who has ever called this owner.

The rules before the first word

1. **Consent, always.** First seconds of every call: "Quick heads up, I record my calls so I can give you accurate numbers afterward, that okay?" Several of our lead states require everyone to agree. No consent, no recording, no exceptions.
 2. **Estimates, never guarantees.** Every forward-looking number comes out of the calculator, computed from the owner's own inputs, framed as a target. The methodology target is five back for every dollar in. It is never stated as an average result and never promised.
 3. **Credit before commitment.** If credit stacking is part of the picture, the one dollar credit report happens before they sign, so we know what we are working with and they never buy a maybe.
 4. **The owner talks seventy percent of the call.** If you are talking more than they are, you are pitching, and pitching is what the other ten calls this owner got this month sounded like.
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Call 1: the diagnosis

Open. "Hey David, thanks for jumping on. Quick heads up, I record my calls so I can give you accurate numbers afterward, that okay? Perfect. Where are you calling in from?" Short rapport, genuine, then move.

The firm, in thirty seconds, then done.

"So you know who you're talking to: I'm [Name], an Associate Advisor with Omnira Partners. We're a growth and exit advisory firm. Our team has sat with more than three hundred owners in businesses like yours, and the firm runs over 1.1 billion dollars in active deal flow through our deal origination practice, working alongside private equity and family office relationships. For a company your size, our work starts on the growth side: reactivating the revenue already sitting in your database, tightening the operation, and building toward whichever door you want, growing, buying, or selling. But honestly, the useful part of this call is me understanding your business, so let me ask you a few things."

That is the whole intro. The origination desk and the billion-one get one sentence of altitude and then we come back to their company. We do not sell the deal desk to a fifteen thousand dollar pilot conversation; it is credibility, not the offer.

Discovery is the call. The Fathom record across our own meetings is unambiguous: when we ask, owners tell us exactly where to go. Ask in this order, then follow what they give you:

1. "Walk me through the business. What's working right now, and what's the thing that annoys you every week?"
2. "How many past customers and old leads are sitting in your system? A thousand? Five thousand?"
3. "What's your average ticket, and how often does a good customer come back?"
4. "If a real wave of work showed up next month, could you staff it? What breaks first?"
5. "Have you put money into marketing before? What happened?"
6. "What do you think the business is worth today? Ever had anyone try to buy it?"
7. Late, never early: "So looking out a few years, are you building this to grow, to buy up competitors, or to sell it well?"

Take notes out loud. "So the database is around three thousand, ticket around nine grand, and nobody has touched those contacts in two years. Okay, that matters." The owner hearing their own numbers played back is the moment you become their advisor instead of a caller.

The three doors. When question seven lands, deliver the posture line verbatim: "We don't tell owners what to do with their company. We price your options. Growing it, buying with the new SBA financing, or selling into a market paying multiples most owners haven't heard. The same first engagement serves all three, so you don't have to decide today."

The taste. "Here's the part I can show you right now. That database is money sitting in a drawer. Let's map it." Open the revenue calculator, enter THEIR list size, THEIR ticket, THEIR repeat assumptions, and read the target back as a target: "with your numbers, the pilot targets somewhere in this range. Your inputs, our system, and we treat it as a target, not a promise."

The map. Then widen it one frame: "There are three numbers every owner should know: what you're worth today, what you'd be worth after the growth work, and what the market pays when a business like yours is built right. Independents are selling at four to seven times earnings while the consolidated platforms trade near twenty. Closing that gap is the whole game, and the pilot is where it starts." Estimates language stays on.

The quote. "The engagement is ninety days. For what we mapped today, it's [number], collected to start, and fifteen thousand is the firm's floor. Inside it: the growth audit on your operation, the reactivation build under your name, and if capital is part of your plan, we start with a one dollar credit report before you sign anything so we both know what's real. Sounds good to get started?"

Never say "only," never say "down," never quote below the floor. The diagnosis decides the number; the floor is where the number starts.

Objections. Three memorized breakers, answered from the economics (module 06 carries them: "so this is marketing?", "why fifteen thousand?", "what happens after ninety days?"). Reclose once if

the decision makers are on the call.

Escalation. At ninety percent with decision makers present: "Let me bring in our Director, [Name] runs this desk and can speak to exactly that." If a partner or spouse is missing: "Then let's do this properly. I'll set call two with everyone, and I'm bringing [Name], the Principal who would personally hold your account."

Disqualification. If the database is thin, the ticket is small, or the money is not there: say so cleanly. "Honestly, this engagement isn't built for where you are right now, and I'd rather tell you that than sell you something that won't move your numbers." Log it: a business too small to be a client may be inventory for a buyer we already have. Saying no cleanly is graded on this floor.

Call 2: the deal team

Everyone with a vote is on this call, and you do not run it alone.

1. Reintroduce the firm in the same thirty seconds, for the new faces.
2. Get to know the other partners: two minutes each, genuine.
3. Play back call one: "Here's what [owner] and I found," pains and numbers, and confirm it out loud with the room.
4. Screen share the calculator, rebuild it live with the room watching their inputs go in.
5. If the room wants more: the advanced deck. Growth audit breakdown, the valuation map (today, after, future), worked examples of businesses like theirs they could acquire under the October SBA rules, SBA education. Case examples come from real cohort results as they exist; nothing invented, nothing borrowed.
6. Introduce the seat: "[Name] is the Principal who holds your account if we move forward. I stay your advisor day to day; [Name] owns the engagement."
7. Reclose. If it is not a yes, schedule the decision call before leaving the room.

Call 3 and beyond: senior leadership

High-potential accounts get the firm's weight: a Managing Director joins, and for the right account we get on a plane. Framed as service, not pressure: "our Managing Director takes a personal interest in engagements in your industry."

And when the account is bigger than the pilot lane, larger revenue, a real raise, a sale outside the exemption ranges, we say so with pride, not apology: "This is where it becomes a team sport. The firm brings in our investment banking and registered broker-dealer partners under the parent brand, they operate the regulated side of the deal, and your deal team here stays your deal team." The firm earns its points on the transaction, the advisor's seat earns per the deal split memo, and nobody on this floor ever freelances a securities conversation.

The deal team language

SEAT	THE CLIENT HEARS	NEVER
Associate Advisor	"your advisor"	"the rep," "the salesperson"
Principal	"the Principal on your account"	"my account executive," "my manager"
Director	"our Director, [Name] runs this desk"	"my boss," "a manager to help close"
Managing Director / Partner	"our Managing Director" / "one of the firm's partners"	"senior sales leadership"

The wrapper phrase, used verbatim: "your deal team at Omnira Partners." People get added to the client's team. Nothing is ever handed off.

Assist economics

Bringing in a Director, Principal, or MD to help close does not move the payee lines. The closing advisor keeps the advisor line, the Director line belongs to the Director regardless, and the Principal line belongs to the seat that takes the account. Escalate early and often; it costs you nothing and it is how the firm closes.

The closer model: why this seat pays

For the closers we are recruiting into these seats, this process is the point. You are handed a structured engagement that sells fast, a fifteen thousand dollar floor with your commission climbing on everything you price above it, and every pilot you close builds the book that pays the bigger seats: the Principal's ten percent of continuation accounts that start at forty five thousand a quarter, and memo-papered participation when accounts graduate into acquisitions and exits. The pilot is the hotcake. The career is what the hotcake buys: trained closers, asking better questions, building real relationships with owners, and standing inside transactions most salespeople never see. Killers, partnership builders, scale builders. That is the model.

Internal floor canon for Omnira Partners. Forward-looking figures in client conversations are computed from client inputs and presented as targets, never guarantees. Omnira Partners operates as a parent brand and advisory firm; formal securities transactions and broker-dealer services, where required, are conducted through partnered regulated entities. Follow the consent, credit, and disqualification rules on every call.