

How Business Brokers Use Vertical IQ to Win Clients and Close Deals Faster



- **For business brokers, every conversation with a prospective client is a chance to demonstrate credibility, expertise, and preparedness. Trust and timing drive both buy-side and sell-side transactions, so the ability to walk into a meeting already fluent in a prospect's industry can make the difference between securing a listing and losing an opportunity.**

Tony Khoury, managing director and franchise owner at [Transworld Business Advisors of Eastern N.C.](#), in Greenville, North Carolina, was looking for 1) a time-saving solution that could quickly get him up to speed on an industry prior to a meeting with a prospect or client, as well as 2) a resource to cut his listing package creation time without sacrificing professionalism, quality, or accuracy – the cornerstones of his firm.

Fortunately, Tony's involvement with a professional association for business brokers and M&A advisors would lead him to a product that would solve for both.

THE CHALLENGE

A former engineer and business owner turned M&A advisor, Tony leads a 15-office team that helps clients confidentially buy and sell companies across the East Coast. When he made this career transition, Tony quickly learned that preparation is key.

Sellers expected him to understand their world: their customers, financials, and competitive challenges. But Tony also realized researching a new industry from scratch for each engagement was time-consuming and inefficient, especially when building a new book of business.

"I would spend hours going to Google or ChatGPT to try to learn about an industry," Tony explains. "What I needed was a way to access relevant, trusted data fast so I could

walk into a meeting ready to have an intelligent, productive conversation."

As his Transworld franchise grew to represent larger and more complex deals, Tony also needed a way to differentiate his firm. He wanted every presentation and marketing package to reflect the professionalism and depth of insight that clients expect from a top-tier M&A advisor.

When Tony joined [M&A Source](#), a national organization for mergers and acquisitions professionals, access to Vertical IQ was included as part of his membership. He began using the platform regularly, working closely with members of Vertical IQ's Customer Success Team for demos and support. He soon realized that this was the very [Industry Intelligence](#) solution he'd been searching for.

THE SOLUTION

Tony and his team of business brokers turned to Vertical IQ as their go-to source for deep industry-specific data combined with time-saving tools designed for client-facing professionals. Tony noticed the positive impact in four key areas of his day-to-day business brokerage tasks:

Attracting new clients with credibility: Before every first meeting, Tony uses Vertical IQ to run a customized industry report based on the client's NAICS code. "It's part of my homework before I go to my first meeting; it takes me just five minutes," he says. "I'll highlight key data points – multiples of sale, growth percentages in their state, industry cost benchmarks – and walk into the room ready to share real insights."

When he met with the owners of a \$40 million plumbing and HVAC distribution business, that preparation paid off. "I pulled out the Vertical IQ report and showed them what was happening in their industry: North Carolina growth trends, cost of goods sold averages, et cetera. It definitely impressed them and helped me get the listing."

Vertical IQ didn't just save time; it elevated Tony's positioning as a trusted advisor. When it comes to M&A deals, "I'm the quarterback driving the ball down the field," he says. "You need reliable tools and professional partners like Vertical IQ that help you know what you don't know."

Creating professional, data-rich listing packages: Once Tony wins the engagement, his team invests weeks preparing a listing package for buyers. That package includes content such as a financial recast, lender prequalification, and – thanks to Vertical IQ – a professional-looking industry analysis.

"When we go to market, everything's confidential," Tony explains. "But once a buyer signs an NDA, they get our listing package, including the Vertical IQ report I've highlighted, which we have the ability to brand with our Transworld logo."

Vertical IQ gives buyers instant context about the sector, typical margins, and growth drivers – details that might otherwise take them hours to uncover. And it gives Tony and his team instant credibility. "The content from Vertical IQ is comprehensive," Tony says. "Buyers see it and go, 'Wow, this is really buttoned up.' That helps us close deals faster."

Saving time and increasing efficiency: Not only does Vertical IQ save time for Tony with tasks like meeting preparation and listing package development, it also streamlines the research process for team members across his six offices. "It's a tremendous timesaver for researching particular sectors," he says. "It has shaved hours off our prep work and made us more efficient."

He continues: "What's more, by consolidating market intelligence from trusted third-party data sources, Vertical IQ allows my team to focus on client relationships and deal execution rather than endless online digging. Vertical IQ allows our office to generate more listings and close them faster."

Building stronger partnerships for continuous improvement: Having run several businesses, Tony knows that the relationships you have with business partners can be the key to your success ... or yet another challenge to deal with. “You want partners that are going to be around, that answer the phone, that you can trust,” he says.

That’s why, beyond the data itself, Tony values Vertical IQ for its customer-centric culture and responsiveness. “I’ve had a great experience working with Vertical IQ; I love the product and their team. If I ever have a question, I call my customer success manager, and she gets it handled.”

And as with any relationship, communication and honesty are essential. “With Vertical IQ, there’s a feedback loop for improvement,” Tony notes. “That’s important; it means they care and they listen.” In fact, Tony’s even offered product feedback that Vertical IQ has implemented!

VERTICAL IQ LEVELS-UP THE BUSINESS BROKERAGE PROCESS

For Tony Khoury and his Transworld team, Vertical IQ has become more than a time-saving research tool; it’s a competitive advantage.

By equipping brokers with **actionable, convenient, focused** insights, Vertical IQ helps them build credibility, streamline preparation, and deliver professional materials that inspire confidence.

“Put together, Vertical IQ’s capabilities empower our brokers to deliver exceptional value to both sellers and buyers, turning preparation into a powerful differentiator at every stage of the deal process,” Tony observes.

As Tony sums it up: “Working with Vertical IQ as a partner on industry analysis and statistics has allowed our office to generate more listings and close them faster. It’s a huge time saver, and it makes us look good doing it.”



OUR SUCCESSES ARE ALWAYS CO-AUTHORED WITH OUR CUSTOMERS.

TO LEARN MORE ABOUT HOW VERTICAL IQ CAN GIVE YOUR TEAM AN EDGE, CONTACT US AT 919.787.4600 OR INFO@VERTICALIQ.COM.

