

# Peterson Acquisitions Enhances Client Engagement With Vertical IQ Business Pro



- **Peterson Acquisitions is a network of business brokers specializing in Small Business Administration (SBA)-funded transactions. Michael Moore, a top-producing partner with Peterson, sought a solution to elevate his firm's client engagement and competitive edge.**

Having previously utilized Vertical IQ during his tenure at the North Carolina Small Business and Technology Development Center (NC SBTDC), Michael recognized the Industry Intelligence tool's ability to enhance "The Peterson Way" – his proprietary process for facilitating business acquisitions and sales.

This case study explores how Michael leveraged Vertical IQ to build trust, authority, and efficiency in his client interactions, ultimately contributing to Peterson Acquisitions' impressive 90% success rate in SBA deals.

## THE CHALLENGE

Before integrating Vertical IQ, Michael identified a need to further differentiate his services and deepen client conversations. While "The Peterson Way" was effective, he sought a tool that could provide quick, comprehensive Industry Intelligence to better prepare for client meetings, facilitate deeper discussions, and proactively address client concerns.

Traditional search methods lacked consistency, and Michael found other industry report providers were "a little too heavy" and not polished enough for direct client-facing use. The challenge was to identify a solution that offered timely, digestible, and actionable insights to build immediate rapport and confidence.

## THE SOLUTION

Michael turned to Vertical IQ, a solution he was already familiar with and preferred for its "more polished" and comprehensive data. He strategically integrated Vertical IQ into various stages of his sales and client fulfillment processes:

**Meeting preparation:** Michael uses Vertical IQ to quickly frame his mindset for conversations specific to a client's industry, enabling him to better understand their unique challenges and opportunities.

**Client engagement:** During client and prospect calls, Michael frequently shares his screen and walks through Vertical IQ industry reports. This approach provides objective, data-driven insights, making clients feel "heard and understood" and fostering instant trust.

**Buyer and seller education:** He sends Vertical IQ industry reports to buyers to help them prepare for interviews with sellers, suggesting relevant

call prep questions. For sellers, these reports demonstrate Michael's deep understanding of their industry, setting him apart from other brokers.

**Financial analysis and forecasting:**

Michael incorporates Vertical IQ's industry benchmarks and forecasting data into his firm's cashflow analysis spreadsheets. This allows Peterson Acquisitions to pre-underwrite SBA funding deals in-house and present objective projections to banks, strengthening clients' loan applications.

**Marketing and client acquisition:** He leverages industry reports or specific sections, like profit drivers, as marketing tools in email sequences and LinkedIn outreach to attract new seller leads.

## RESULT

The use of Vertical IQ has yielded significant benefits for Michael Moore and Peterson Acquisitions:

**Enhanced trust and clout:** Michael consistently builds "trust and authority faster upfront" with clients. Clients frequently describe their calls with him as "refreshing" due to his demonstrated depth of industry understanding.

**Competitive differentiation:** By providing polished, digestible industry reports, Michael stands out in a crowded brokerage market where many competitors use less client-friendly tools or

rely on inconsistent search results. As Michael states, "Once I have that [industry-focused] conversation with the seller, it's game over."

**Increased efficiency:** Michael values the speed and compilation of information, noting, "I can go in and 15 seconds, type in the industry or NAICS code, get the report and I'm ready." This efficiency allows him to focus on deeper client interactions.

**Improved deal success:** The objective data from Vertical IQ helps Peterson Acquisitions navigate complex deal negotiations, even with banks. Michael recounts instances where Vertical IQ data helped "push deals through that people have said, 'You won't get that deal done.'"

## CONCLUSION

Michael Moore's experience at Peterson Acquisitions exemplifies how Vertical IQ solves the "X-factor for trust" in the competitive world of business brokerage. By providing readily accessible, comprehensive, and client-friendly Industry Intelligence, Vertical IQ empowers professionals to build stronger relationships, differentiate their services, and drive successful outcomes.

**For Michael, Vertical IQ is not just a tool; it's an integral part of his strategy to make clients "feel heard and understood," leading to instant trust and a clear competitive advantage.**



**OUR SUCCESSES ARE ALWAYS  
CO-AUTHORED WITH OUR CUSTOMERS.**

TO LEARN MORE ABOUT HOW VERTICAL IQ CAN GIVE  
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