



The REvision Group's Strategic Vetting Program

Although satisfied clients and partners may offer positive feedback, their perspective is limited to successful experiences.

Rather than seeking references solely from a firm's current investors or partners, The REvision Group recognizes the untapped wisdom that can be obtained by engaging with those involved in underperforming deals, third-party vendors contributing to daily activities, or former employees who have moved on.

These vetting tools, along with our disciplined strategies of identifying "Best in Class" sponsors, allows The REvision Group to be the Premier Capital Advisory company and to be the preferred group for our Family Office Partners.

Three often-overlooked groups that can provide valuable insights for investors making informed decisions:

1. Former investors in deals that didn't go well

Investors in underperforming deals possess a unique perspective on the reasons for failure. Engaging with them allows for learning from mistakes, identifying potential pitfalls, and understanding a firm's ability to adapt and recover. A firm's true strength lies in its ability to bounce back from setbacks. References from investors who have experienced disappointment shed light on how the firm handles adversity, navigates challenging situations, and learns from its missteps. These references provide a deeper understanding of a firm's resilience, adaptability, and commitment to growth. Encouraging contact with former investors, even in less successful endeavors, demonstrates transparency and a willingness to learn. This openness allows for an evaluation of how the firm takes responsibility, rectifies issues, and improves its future investment decisions.



2. Current third-party vendors and service providers (lawyers, accountants, property managers, leasing brokers)

The strength and quality of a firm's partnerships with third-party vendors and service providers can indicate their ability to build successful relationships and manage complex networks. Reaching out to these professionals allows for an assessment of how the firm collaborates, communicates, and handles challenges within its broader ecosystem. Interacting closely with the firm on various matters, these experts acquire firsthand knowledge of its professionalism, integrity, and competence. As a result, their feedback offers a distinct perspective on the firm's reliability, compliance with regulations, and overall ethical standards. Evaluating a firm's operational efficiency is crucial for investment decisions. Insights from third-party professionals can shed light on the firm's organizational capabilities, responsiveness, and adherence to timelines, helping to assess whether they are reliable and capable of meeting their commitments.

3. Former employees of the firm

Former employees can offer unique insights into a company's culture, management practices, and potential red flags that financial statements may not reveal. Understanding the reasons behind an employee's departure can provide valuable insights into the company's inner workings. Their responses may shed light on issues such as poor management practices, a toxic work environment, or potential conflicts of interest. The company culture exerts a substantial influence on employee satisfaction, productivity, and long-term prosperity. Inquiring with former employees about the company culture enables investors to assess its alignment with the organization's stated values and its ability to foster a supportive environment for growth. Pay attention to responses that address transparency, collaboration, innovation, and how employees are treated as a whole. By complementing traditional vetting methods with insights from these three groups, investors can form a well-rounded assessment of a firm they are considering partnering with. This approach allows for a deeper understanding of the company's culture, potential risks, and ethical practices.