BROKER OUTREACH & TRACKING: SOP v2  
Status: Draft  
Last updated: 05.08.2025  
SOP ID: 2

| **0. PREREQUISITES & DESKTOP SET‑UP** |
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## **1. PROCESS OVERVIEW**

**Objective:** Twice per weekday (morning and afternoon) manually search eleven broker sites for new MSP/IT‑services listings, record them in the tracking sheet, and advance qualified opportunities in HubSpot.

**Process Description:** To consistently, and periodically, check for new, relevant listings on different broker websites, in order to stay up to date with any potential assets to buy.

**Purpose & Scope:** After a period of manual site monitoring, the process will be fully automated with a web scraper. To achieve this, the exact location/process of locating the relevant listings must be outlined.

| **2. LOGINS**  **Account Logins – Smergers, EMF Group, Dealsuite**  **User:** [nils.howland@ironbridgesp.com](mailto:nils.howland@ironbridgesp.com)  **Password:** Ironbridge2025!  **Account Login – Business Sales Report**  **User:** [nils.howland@outlook.de](mailto:nils.howland@outlook.de)  **Password:** Ironbridge123! |
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## **3. MORNING SCAN**

STOP scrolling on each site when you reach the first listing dated yesterday. **For every card above that point execute the two‑step validation below before capturing data.**

*Step 1 – Broker‑Specific Filters*  
Apply the site filters exactly as described in sub‑sections 3.1 to 3.11 (industry, geography, newness sorting).

*Step 2 – Title Keyword Check*  
Visually confirm that the listing title (or headline) contains **at least one** of the following terms (case‑insensitive):

* MSP
* MSSP
* IT Support
* Managed Service Provider
* IT Services

Listings that do not meet this keyword test are skipped and **not** entered in the sheet. If both steps pass, open the listing in a new tab and gather the fields in Section 4.

|  |  |  |  |
| --- | --- | --- | --- |
| Scraping Pathways | | | |
| # | Broker | Site | Path |
| 3.1 | RightBiz | [Landing Page](https://www.rightbiz.co.uk/) | a. Browse by Sector > Information Technology. b. In the sidebar set Location = United Kingdom (Nationwide). c. Sort by Newest. d. Scroll until a “Yesterday” badge appears. e. Apply title keyword check; capture qualifying listings above the stop point |
| 3.2 | Transworld Business Advisors | [Business Listing Search](https://tworldba.co.uk/buy-a-business/business-listing-search/?state=&county=&category=IT+Services&subcategory=&listing_price_min=&listing_price_max=&down_payment_price_min=&down_payment_price_max=&seller_price_min=&seller_price_max=&formsubmit=1&sort=price-high-low&items_per_page=10) | a. Main navigation > Listings. b. In filter pane set Industry = IT Services. c. Set Region = United Kingdom, then Apply Filters. d. Sort by Newest. e. Apply title keyword check; capture qualifying listings above yesterday. |
| 3.3 | Daltonsbusiness | [Businesses for Sale](https://www.daltonsbusiness.com/listing-businesses-for-sale/) | a. Browse by Category > IT & Computing Services. b. Quick filter Location = United Kingdom. c. Toggle Only New. d. Scroll until yesterday. e. Apply title keyword check; capture qualifying listings. |
| 3.4 | Businessesforsale | [Businesses for Sale](https://uk.businessesforsale.com/uk/search/businesses-for-sale) | a. In search bar type Information Technology and choose Misc. IT/Consultancies. b. Region selector = United Kingdom. c. Sort by Newest. d. Show 50 per page, scroll until yesterday. e. Apply title keyword check; capture qualifying listings. |
| 3.5 | Hornblower | [Business for Sale](https://hornblower-businesses.co.uk/business-for-sale/) | a. Sector = Technology & B2B Service. b. Status = For Sale, then Apply. c. Sort by Latest. d. Scroll until yesterday. e. Apply title keyword check; capture qualifying listings. |
| 3.6 | Business Sale Report | [Businesses for Sale](https://www.business-sale.com/companies-for-sale?keyword=&reference=&region=&cat=1&date=&turnover=&turnover_from=&turnover_to=&vendors%5B%5D=4&vendors%5B%5D=1&vendors%5B%5D=3&vendors%5B%5D=2&vendors%5B%5D=6&vendors%5B%5D=5) | a. Sector filter = Technology. b. Tick Show Only Latest. c. Submit filter. d. Scroll until yesterday. e. Apply title keyword check; capture qualifying listings (note Report ID). |
| 3.7 | Benchmark International | [Acquisition Opportunities](https://embracebenchmark.com/) | a. Industry = IT Services. b. Region = United Kingdom. c. Click Find Opportunities. d. Scroll until yesterday on result grid. e. Apply title keyword check; capture qualifying flip‑card listings. |
| 3.8 | BizSale | [Business For Sale](https://bizsale.co.uk/Business-For-Sale/Technology/0/Any/1/0/0/) | a. Sector = Technology.  b. Ensure Include Pending is OFF, press Search.  c. Sort by Newest.  d. Scroll until yesterday.  e. Apply title keyword check; capture qualifying listings. |
| 3.9 | Smergers | [IT Services Businesses for Sale in UK](https://www.smergers.com/it-services-businesses-for-sale-in-uk/c83s796t2b/) | a. Transaction Type = Businesses for Sale. b. Location = United Kingdom. c. Industry = IT Services; click Apply. d. Switch to Newest tab. e. Scroll until yesterday, apply title keyword check; capture qualifying listings. |
| 3.10 | EMF Group | [Businesses for Sale](https://www.emfgroup.com/businesses) | a. Business Type = IT & Computing Services. b. Geography = All, click Search. c. Order by Date – Newest. d. Scroll until yesterday, apply title keyword check; capture qualifying listings. |
| 3.11 | Knightsbridge Commercial | [Buy a commercial business](https://www.knightsbridgeplc.com/buy-a-business/commercial/) | a. Sector = IT Services & Support. b. Region = England. c. Press Update Results. d. Scroll until yesterday, apply title keyword check; capture qualifying listings. |

| Data Entry to Excel | | | | |
| --- | --- | --- | --- | --- |
| Col | Field name | Format / allowed values | Example | Notes |
| A | Date\_Added | Date yyyy‑mm‑dddefault =TODAY() | 2025‑08‑05 | Date the row is created. |
| B | Link | Hyperlink | <https://example.com/listing/123456> | Paste full page URL. |
| C | Listing\_ID | Text (unique) | 123456 | Numeric or slug fragment from URL. |
| D | Active? | **YES** / **NO** | YES | Set to NO if listing is removed or shown as “under offer”. |
| E | Status | NEW / CONTACTED / RESPONDED / QUALIFIED / CLOSED | NEW | Mirrors HubSpot stage names. |
| F | Broker\_Attractiveness | 1 … 5 | 4 | 5 = flagship broker, 1 = low value. |
| G | Broker | Drop‑down | RightBiz | Must match broker manifest exactly. |
| H | Contact\_Person | Text | Jane Brown | Broker representative; blank if unknown. |
| I | Revenue (£m) | Number, 2 dp | 3.25 | Convert to GBP before entry. |
| J | EBITDA (£m) | Number, 2 dp | 0.80 | Use proxy (Adj. NP ÷ 0.85) when EBITDA not provided. |
| K | FTEs | Integer | 12 | Enter 0 if not disclosed. |
| L | Recurring\_Rev\_% | Number 0‑100 | 72 | Leave blank if undisclosed. |
| M | Category | Text | MSP | Primary service line (e.g., MSP, Cyber, Cloud). |
| N | Notes | Text ≤ 140 chars | High RR; UK South East | Use plain text only. |
| O | Evidence\_Link | Hyperlink | link to PNG/PDF | Drive link to screenshot or teaser. |

**Quality controls**

* *Conditional formatting* is embedded in the template:  
  – **Active?** = YES (green fill), NO (grey with strikethrough).  
  – **Status** values display in blue (NEW), amber (CONTACTED), purple (RESPONDED), green (QUALIFIED), black (CLOSED).
* *Duplicate guard*: An Apps Script runs on edits to **Listing\_ID**. If the ID already exists, a pop‑up alert appears and the entire row is shaded grey — investigate before proceeding.

**5. MANUAL FIT DECISION RULES**

* EBITDA: ≥ £1 m for platform, ≥ £0.3 m for add‑on. Use adjusted net profit ÷ 0.85 when EBITDA absent.
* Asking‑price multiple: ≤ 7× EBITDA.
* Recurring revenue: Reject if < 50 percent.
* Staff count: Flag for review if < 5 FTEs.
* Owner involvement: Reject add‑ons where owner is sole lead engineer; review for platforms.

1. **OUTREACH WORKFLOW (EMAIL & PHONE)**

STEP 1 – DIRECT CALL (Day 0)

* **Who**: Analyst (or Head Origination for Tier‑1 brokers).
* **When**: Same day the listing is recorded.
* **Script location**: XXX
* **Execution**: Dial via number in sheets.
* **After call**: In the sheet set **Status = CONTACTED** and add call outcome (Connected / Voicemail / No Answer) to **Notes**. HubSpot auto‑logs recording.

STEP 2 – FOLLOW‑UP EMAIL (Day 1 if no callback)

* **Tool**: Outlook + Yet Another Mail Merge (YAMM).
* **Queue source**: Sheet tab **Outreach\_Queue** filters rows where Status = CONTACTED but **Broker\_Response\_Date** is blank.
* **Template**: Broker – First Touch. Merge tags: {{Contact\_Person}}, {{Listing\_Title}}, {{Deck\_Link}}.
* **Batch size**: ≤ 20 emails to avoid Gmail throttling.
* **After send**: YAMM webhook changes **Status → EMAIL\_SENT** (Apps Script). Manual replies will later flip Status to RESPONDED.

STEP 3 – WEB CONTACT FORM (Day 5 if no email reply)

* **Trigger**: A row remains **EMAIL\_SENT** with no reply five business days after Step 2.
* **Action**: Navigate to broker’s website contact form; paste the canned copy from Drive > Templates > Broker\_Form\_Submission.txt. Include Ironbridge deck link.
* **Logging**: Set **Status = FORM\_SUBMITTED** (add value to dropdown list) and put submission timestamp in **Notes**.
* **Reminder task**: Create HubSpot task “Follow‑up form submission” due in seven days.

1. **AFTERNOON SCAN**

Repeat broker scans focusing on Smergers and Benchmark International, which often update mid‑day. Record new listings and reply to broker emails received during the day.

1. **FILING & ARTEFACT MANAGEMENT**

Listing Screenshot Drive > Deal Flow > Screenshots > YYYY‑MM‑DD

Teaser PDF Drive > Deal Flow > Teasers > YYYY‑MM‑DD

NDA PDF Drive > Deal Flow > NDAs > Pending

Call Recording Drive > Deal Flow > Call Recordings > Listing\_ID

Paste Drive link into Evidence\_Link column of the sheet.

1. **DAILY TEAMS SUMMARY**

**Optional!** Post in TEAMS: “Broker Scan Summary – . New listings: . PASS: . REVIEW: . FAIL: . Details: .”

1. **WEEKLY & MONTHLY CADENCE**

Weekly – Monday 10:00 – refresh KPIs in sheet tab “KPIs”; post digest in Teams.

Weekly – Wednesday 15:00 – broker nurture emails to Tier 1 brokers.

Monthly – first business day – re‑score broker tiers based on 90‑day performance.

1. **PAIN‑POINTS & OBSERVATIONS LOG**

Maintain sheet tab “Pain\_Points” with Date, Broker, Issue\_Type, Description, Time\_Lost\_Min to guide future automation.

**CHANGELOG**

{{05.08.2025}} – Version 2 (Author: Anna Leven).