

DataOffer Partner Kit

A short PDF you can keep on file or forward to a client: how the process works, who fits, what stays private, a timeline and the questions owners ask most.

From: DataOffer (getdataoffer.com) · **For:** M&A advisors, business brokers, fractional CFOs and COOs, accountants and bookkeepers, and operations or IT consultants who advise owners of US companies with 20–200 employees.

1. What this is

Here's what we tell advisors first: AI labs now license de-identified operational data from ordinary companies, the Slack threads, tickets, SOPs and CRM history that show how real work gets done. Most owners have never heard of it. You can be the person who tells them, and we do the rest.

2. How we work with advisors

- **You make a light introduction.** A name and an email is enough. We send one short, friendly note that mentions you, and if the owner says no, we stop.
 - **We scope and estimate.** A 20-minute call covers which systems they use, how many years of history they keep and what's off limits. No files change hands.
 - **We place it with buyers.** We describe the de-identified dataset to multiple buyers and bring back competing offers. Your client approves the buyer, scope, price and terms.
 - **You stay in the loop.** With your client's permission we copy you on the estimate and the agreement, so it fits their exit, financing or planning work.
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3. Who makes a good introduction

1. **20 to 200 employees.** Big enough to have years of Slack, email, tickets and documents, small enough that nobody has thought to value them.

2. **Five or more years of history.** Longer history usually means more workflows, edge cases and decisions recorded, which is what buyers want.
 3. **Writing-heavy operations.** Logistics, construction, home services, clinics, manufacturing, agencies, professional services, SaaS and staffing all qualify.
 4. **A moment of change.** An upcoming sale, a recapitalization, a cost-cutting year, a system migration or a wind-down. Data is easiest to export before systems change.
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4. Confidentiality and de-identification

- **Nothing moves without approval.** The owner approves the buyer, the scope and the terms before any data leaves their systems.
 - **De-identified before delivery.** People, customers and identifiers are replaced with consistent placeholders, and the owner sees a redacted preview first.
 - **Exclusions by default.** HR files, credentials, payment card data, privileged legal material and anything the client marks off limits stay out.
 - **Contractual limits.** Buyers sign terms that restrict use, prohibit re-identification and govern retention.
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5. Timeline

1. **Week 1.** Introduction and scoping call. We send a written estimate range with the assumptions spelled out.
2. **Weeks 2–4.** Inventory, sample export, de-identification and the redacted preview for the owner.
3. **Weeks 3–8.** Buyer outreach and offers. The owner compares terms and picks one, or walks away.
4. **After signing.** Full export, de-identification, quality review, delivery and payment under the agreement.

Timelines vary with data volume, the systems involved and how fast the client's team can respond. Estimates are illustrative and are not offers.

6. Economics

No cost to your client upfront. We are paid only if a deal closes, under terms the client approves. We do not pay or accept referral fees.

7. Common questions

Do you pay referral fees?

No. We don't pay referral fees or commissions. Partners introduce clients because it's a useful, no-cost option for them. If that ever changes, it will be stated in writing on this page first.

Will you contact my client without my say-so?

Only after you submit an introduction. We send one short email that mentions you. If the owner doesn't reply or says no, we stop.

Does this interfere with a sale of the business?

It shouldn't, but timing matters. A data license is usually non-exclusive and can be structured around a pending transaction. Involve deal counsel, and tell us about any LOI or exclusivity so we can work around it.

What does it cost my client?

Nothing upfront. We're paid only if a deal closes, under terms the client sees and approves in the agreement.

Can you tell me what the data is worth before I introduce them?

We can give a rough, illustrative range from headcount, years of history and the systems they use. A real number only comes from buyer offers, and we don't promise any specific price.

Which systems do you work with?

Slack, Google Workspace and Microsoft 365, CRM and ERP systems, ticketing tools, document and wiki platforms, and code repositories, among others.

Can I stay involved after the introduction?

Yes, if your client wants that. We'll copy you on the estimate and the agreement, and you can join calls.

Contact

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General information, not legal, tax or financial advice. Estimates are illustrative and are not offers.