

How To Find **Off-Market M&As**

1. The “Acquisition Wheel”
2. ZoomInfo, SalesNavigator + Crunchbase
3. Facebook Groups, Pages, Places + Events
4. YouTube, Instagram + TikTok Channels + Videos
5. LinkedIn, Facebook, MeetUp + Networking Groups
6. Direct Mail (mail house), email (CRM)
7. Ringless voicemail (CallLoop, Drop.co, SlyBroadcast)
8. Apple Podcasts, Spotify, etc. for Podcasts
9. Masterminds

How To Find Off-Market M&As

M&A Offer Tracking ☆ 📁 ☁

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	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	Tag	Mailers Sent	Cost	Responses	Response %	Calls Made	Conversations	Cost Per Conv.	Data Collects	Offers Made	Offers Accepted	Acceptance %	Closings
4	HVAC SD	2500	1375	139	5.56%	139	74	\$18.58	18	11	3	27.27%	2
5	HVAC OC	2500	1375	41	1.64%	41	33	\$41.67	21	15	2	13.33%	2
6	HVAC LA	3500	1925	322	9.20%	322	182	\$10.58	39	21	6	28.57%	5
7	HVAC PHX	4000	2200	173	4.33%	173	119	\$18.49	26	17	5	29.41%	5
8	HVAC RS/SB	1500	825	83	5.53%	83	65	\$12.69	35	24	8	33.33%	7
9	Accountant RS/SB	4000	2200	284	7.10%	284	157	\$14.01	74	31	11	35.48%	9
10	Accountant PHX	4000	2200	313	7.83%	313	241	\$9.13	31	18	5	27.78%	3
11	Accountant SD	6500	3575	456	7.02%	456	309	\$11.57	87	46	9	19.57%	4
12	Accountant OC	4000	2200	472	11.80%	472	254	\$8.66	79	33	7	21.21%	6
13	Accountant LA	4000	2200	358	8.95%	358	199	\$11.06	42	31	6	19.35%	4

33 Sources of Off-Market M&As

Friends

Family

Phone Contacts

Instagram Search

Direct Mail Lists

Distributors

Email Signature

Due Diligence

Firms

LinkedIn Search

Lawyers

Wealth Managers

Financial Planners

Social Media Posts

People You Meet

Networking Groups

Facebook Friends

Business Appraisers

Financial Planners

LinkedIn

Connections

Trade Associations

Customers +

Suppliers

Masterminds

Contractors

Employees

Angel Networks

EO + YPO + Vistage

Competitors

Trade Events

Accountants

Hoovers