NAVIX

David Kallen

David Kallen is an independent Consultant with NAVIX exit planning network.

I GET IT... it's difficult to predict when will be the right time to exit your business, and it's even harder to be confident that you can maximize value when you do.

My business career started at my family's private label cookie company, which we sold to Keebler in 1993. After helping to successfully integrate the business, it was time to go back to my entrepreneurial roots. In 1999, I bought a specialty food company with thousands of customers including Cracker Barrel, Amazon, Hallmark, Bed Bath & Beyond, Kroger, and Publix, to name a few.

Fast forward through the Great Recession, cancer, and a bone marrow transplant – it was time for a shift in priorities.

I discovered during the sale of my business that I enjoyed the process, and soon after the transaction, I became Managing Director of a boutique M&A firm focused on lower middle market companies.

During my tenure, I was exposed to many owners who wanted to transition but would not be able to generate enough value from a sale and were not personally prepared for "what's next." Seeing this significant need in the market, I earned an exit planning certification, and now enjoy helping fellow business owners prepare for a successful outcome for their company. Working with NAVIX allows me to leverage my 30-plus years of management, ownership, and M&A roles in the food and consumer industries, with NAVIX's best-in-class exit planning services and superior proprietary processes.

Given my background, I help clients in the development of:

• Efficient and effective marketing and sales processes
• Growth strategies for multi-channel customer markets
• Key differentiators which are attractive to strategic and financial buyers

Please contact me if you have an interest in exploring any of these areas effecting value creation and the ability to have a successful transition. I would be happy to start a confidential discussion with you regarding the future of your business!

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