



Business Health Checkup Service

Our Vision:

Business consultants are either like general medical practitioners (doctors) or they are specialists – (Heart surgeon). These are skilled people with experience in their fields, BUT one thing they All rely on to do their job is – Lab work. Without blood tests, x-rays, cat scans or MRI's etc. they can only guess what the problem of their patient actually is.

Malpractice occurs when prescribed medications or surgeries are recommended without proof that they are actually addressing the real problem. The same is true of a mechanic – especially with today's computerized cars. A technician has to first accurately diagnose what is wrong with the car before he can fix what's broken and better still, he can see what potentially is a big problem starting. We see the value of these things every day – excepting when it comes to business.

Some people take the “fly by the seat of their pants” approach – believing they know what they are doing. Others hire consultants who guess at what they need and prescribe what they think the solution is to their current difficulties. BUT that makes them no different than the doctor who prescribes medication without lab work to confirm what the problem really is.

Its time for a change in attitude and practice in the world of business. That is why I created our Business Health Checkup labs – a tool to identify where the problems really are, how severe they are and what can be done to fix them. In our opinion EVERY BUSINESS ought to have at least one full annual health checkup. In these days of major disruptions, AI, wars, Tariffs and the like, things are changing quickly and many companies are not ready for what's coming and as a result many will fail. Our goal is to help businesses take a good look “under the hood” to see what's really going on and where they could be most vulnerable. Big corporations would be wise to do this even more frequently.

So, to sum up our vision – we aim to be the go-to service for every business owner, CEO or Business Consultant to get the facts before they take any actions and to do a checkup regularly – at least once a year. To that end we



have developed BYOBO\$\$ (<https://byoboss.pro>) for small to medium sized companies and Business Optimization Labs for Large corporations. (<https://bizopplab.com>)

What we examine:

Positioning: Positioning is the strategic process of defining how a company wants to be perceived in the minds of its target customers relative to competitors. It clarifies what the company stands for, who it serves, the specific problem it solves, and why it is different or better than other options. Strong positioning aligns messaging, branding, pricing, and customer experience around a clear value proposition, so that when customers think of a particular need, they immediately associate the company with a distinct benefit or category. In short, positioning shapes perception and perception drives buying decisions. For example in years gone by Cadillac positioned itself as the premiere quality North American car. They did it so well that the term “Cadillac” became used when describing anything premium. That is powerful positioning and that is why this is critical and many companies pay little attention to it. Our analysis audit will uncover where a company is currently compared to its competitors, what their key strengths and weaknesses are and give them a roadmap to claim a position in the minds of their prospects that sets them apart and drives more business to them. This audit alone is worth its weight in gold.

Branding: Branding is the process of shaping and expressing a company’s identity through its visual elements, voice, messaging, values, and overall customer experience to create an emotional and memorable connection with its audience. While positioning defines *where* a company stands in the market and what distinct value it claims relative to competitors, branding brings that position to life in a tangible and experiential way. In simple terms, positioning is the strategic decision about how you want to be perceived; branding is how you consistently communicate and reinforce that perception, so customers recognize, trust, and emotionally connect with your company.

Financial Health: A structured evaluation of a company’s financial strength, stability, and sustainability, designed to identify risks, uncover inefficiencies, and highlight growth opportunities. It examines revenue streams for diversity, consistency, and growth trends; analyzes the cost structure by separating fixed and variable expenses and assessing cost control; evaluates profitability through margins, breakeven points, and return on investment; reviews cash flow to measure liquidity, working capital, and reserve levels; assesses debt and financing by analyzing liabilities, credit facilities, and leverage ratios; verifies the reliability and compliance of accounting and reporting systems. Unlike basic bookkeeping, the audit provides a strategic, forward-looking view of financial performance, enabling business owners to make informed decisions that strengthen resilience and long-term profitability.

Operations: The Operations Audit is a comprehensive assessment of how efficiently and effectively a company runs its day-to-day activities, with the goal of improving performance, reducing waste, and preparing the business for scalable growth. It evaluates processes and efficiency by reviewing workflows, automation, and redundancies; assesses quality control systems including standards, inspections, and error rates; measures capacity and scalability to determine the company’s ability to grow without sacrificing efficiency or service levels; and reviews inventory management through turnover rates, stock control practices, and forecasting accuracy. Unlike routine operational reviews, this audit provides a strategic, systems-level perspective that identifies bottlenecks, strengthens infrastructure, and positions the business to scale smoothly and profitably.

Human Resources: The Human Resources Audit is a strategic evaluation of a company’s people systems, leadership structure, and workplace environment to ensure the organization is built for performance, compliance, and sustainable growth. It examines organizational structure by reviewing roles, hierarchy, and accountability; assesses recruitment and retention practices including hiring processes, turnover trends, and succession planning; evaluates training and development initiatives to strengthen employee growth and leadership pipelines; reviews compensation and benefits for fairness, market competitiveness, and incentive alignment; ensures compliance with employment laws, safety regulations, and measures culture and morale through engagement levels, communication effectiveness, and overall

workplace climate. Unlike basic HR administration, this audit provides a holistic, forward-looking view of workforce health, helping leaders build a high-performing, compliant, and motivated organization.

Marketing: The Marketing Systems Audit is a strategic evaluation of a company's marketing infrastructure to ensure it consistently generates qualified leads, nurtures prospects, and converts opportunities into revenue in a predictable and scalable way. It reviews the overall marketing strategy and positioning to ensure message-market alignment; analyzes lead generation channels for performance, cost efficiency, and diversification; evaluates funnel structure, conversion points, and automation systems; assesses content, branding consistency, and campaign effectiveness; examines customer data tracking, CRM integration, and reporting accuracy; and measures return on marketing investment across channels. Unlike isolated campaign reviews, this audit takes a systems-level approach by identifying gaps, inefficiencies, and missed opportunities so the business can build a reliable, automated marketing engine that drives sustainable growth.

Sales: The Sales Audit is a comprehensive evaluation of a company's sales structure, processes, and performance to ensure revenue generation is consistent, scalable, and aligned with overall business objectives. It examines sales strategy and target market alignment; reviews pipeline management, lead qualification, and conversion processes; assesses CRM usage, reporting accuracy, and forecasting reliability; and measures key performance indicators such as close rates, sales cycle length, customer acquisition cost, and lifetime value. Unlike a simple performance review, this audit provides a systems-level assessment of how effectively the sales engine operates, identifying bottlenecks, skill gaps, and structural weaknesses so the organization can increase conversions, improve predictability, and drive sustainable revenue growth.

Technology: The Technology Audit is a strategic evaluation of a company's technology ecosystem to ensure its systems, infrastructure, and digital capabilities support secure, efficient, and future-ready growth while fully leveraging the impact of AI. It assesses IT infrastructure, including hardware, software, and connectivity reliability; reviews data management practices covering storage, security, backups, and analytics capabilities; evaluates automation and integration across ERP, CRM, AI tools, and workflow systems

to eliminate silos and improve efficiency; analyzes cybersecurity measures such as threat detection, policies, and incident response readiness; and measures overall digital transformation readiness to determine how prepared the organization is to adopt emerging technologies. Unlike a basic IT review, this audit takes a forward-looking, strategic approach by identifying gaps, modernization opportunities, and AI-driven efficiencies so the business can enhance performance, reduce risk, and maintain a competitive technological advantage.

Legal and Compliance: The Legal and Compliance Audit is a comprehensive review of a company's legal foundation, contractual protections, and regulatory adherence to safeguard the business from risk and ensure operational legitimacy. It examines corporate structure, including proper registration, governance documents, and ownership records; reviews contracts and agreements such as vendor, client, employment, and lease arrangements for enforceability and risk exposure; evaluates regulatory compliance with applicable industry standards, environmental rules, safety requirements, and privacy laws; assesses intellectual property protections including trademarks, patents, and copyrights; analyzes overall risk management by identifying potential liabilities and litigation exposure; and reviews insurance coverage for adequacy, policy types, and potential gaps. Unlike routine legal maintenance, this audit provides a strategic risk assessment framework that strengthens legal protection, reduces vulnerability, and positions the business for secure, compliant growth.

Innovation and R&D: The Innovation and R&D Audit is a strategic assessment of a company's ability to create, refine, and sustain competitive advantage through continuous innovation. It evaluates product and service development by reviewing the strength of the innovation pipeline, testing processes, iteration cycles, and improvement frameworks; analyzes market feedback loops to ensure innovation is aligned with real customer needs and validated demand; assesses investment in R&D by examining budget allocation, measurable outcomes, and strategic partnerships; and reviews intellectual property creation, including patents, trade secrets, and proprietary methods that protect differentiation. Unlike informal innovation efforts, this audit provides a structured, performance-driven framework to

ensure that research and development initiatives are disciplined, market-focused, and capable of generating long-term growth and defensible value.

Supply Chain: The Supply Chain Audit is a comprehensive evaluation of the systems, relationships, and processes that move products and materials from suppliers to customers, ensuring efficiency, resilience, and cost control. It assesses supplier performance and diversification to reduce dependency and risk; analyzes procurement practices for pricing, contract terms, and reliability; evaluates logistics and distribution networks for speed, accuracy, and cost efficiency; reviews inventory flow and demand planning to minimize stockouts and excess carrying costs; and examines risk management strategies, including contingency planning and geopolitical or operational exposure. Unlike routine purchasing reviews, this audit takes a strategic, end-to-end perspective by identifying bottlenecks, vulnerabilities, and optimization opportunities so the business can build a resilient, scalable supply chain that supports profitability and sustainable growth through any disruption.

Leadership and Governance: The Leadership Audit is a strategic evaluation of a company's executive effectiveness, governance structure, and decision-making discipline to ensure the organization is guided with clarity, accountability, and long-term vision. It examines decision-making processes to confirm clear authority, defined accountability, and efficient execution; assesses board and advisory roles for effectiveness, independence, and active engagement; evaluates strategic alignment by measuring how well leadership vision translates into operational reality and measurable outcomes; and reviews crisis management preparedness, including contingency planning and reputation protection strategies. Unlike informal leadership assessments, this audit provides a structured framework to strengthen governance, sharpen strategic focus, and ensure the organization is equipped to lead confidently through growth and uncertainty.

Systems: The Systems Audit is a comprehensive evaluation of the interconnected structures, processes, and workflows that drive the organization's overall performance, ensuring that every department operates in alignment rather than in silos. It examines how core business systems such as financial, operational, marketing, sales, HR, and technology integrate and communicate; evaluates process documentation, standard



operating procedures, and accountability frameworks; analyzes automation, reporting, and data flow for accuracy and efficiency; and identifies redundancies, bottlenecks, and breakdowns across departments. Unlike isolated departmental reviews, this audit takes an enterprise-wide perspective, focusing on how well the company functions as a unified system. The objective is to create operational clarity, improve predictability, eliminate friction, and build a scalable infrastructure that supports sustainable growth.

Leadership Attitudes/Mental blocks Audit: The Leadership Mindset Audit is a strategic evaluation of the attitudes, beliefs, emotional resilience, and decision-making psychology of key leaders, recognizing that the mental state of leadership directly influences organizational performance. It examines confidence versus fear-based decision-making, growth versus scarcity thinking, adaptability under pressure, emotional regulation, communication tone, and openness to innovation and accountability. The audit also assesses stress management, cognitive bias, risk tolerance, and the alignment between personal values and organizational vision. This evaluation is critical because leadership attitudes cascade throughout the company, shaping culture, morale, strategic boldness, and crisis response. Unlike traditional performance reviews, this audit focuses on the internal drivers behind external outcomes, helping leaders identify blind spots, strengthen mental discipline, and cultivate the clarity and emotional stability required to guide sustainable growth. For larger corporations with multiple management levels we recommend all managers get evaluated.

Website Audit: The website audit system is a structured diagnostic process designed to identify exactly where a business is losing attention, leads, and revenue online. We evaluate a site across five core areas: positioning and messaging clarity, conversion architecture (offers, calls-to-action, forms, funnels), technical performance (speed, mobile optimization, SEO fundamentals), trust and authority signals, and backend follow-up systems. Instead of delivering vague feedback, we provide a prioritized action roadmap that shows what to fix first for the fastest ROI, whether that's tightening the value proposition, restructuring pages for higher conversions, improving load speed, or implementing automated follow-up. The goal isn't just to "improve a website," but to turn it into a measurable growth asset that consistently attracts, converts, and nurtures qualified prospects.



How we work:

On engagement, we have the company owner/Manager/CEO complete very detailed questionnaires on each of these key areas. This is done online and sent securely to our audit department for review and evaluation. Once we have clarified all the information, we run our auditing system to evaluate each aspect and create a detailed report of strengths and weaknesses and steps that should be taken to fix the weaknesses. Our usual turnaround for small to medium businesses is 2-3 days. For large corporations we do a lot of additional field work which can take between 2-3 months.

The Company then has 3 options moving forward.

1. They can fix the problems themselves.
2. They can hire consultants to help them fix and integrate the solutions
3. They can contract with us to help them implement – a separate engagement agreement.

What does the audit cost?

We base our fees on the value to the company rather than a standard fixed rate. Once we have completed our full audit, we are able to estimate with some accuracy what percentage increase in revenues will occur if implementation is done – not to mention the fact that in some cases it could mean the difference between survival or the company going under resulting in the owner losing everything.

This applies to our small to medium business audits only. For large corporations we quote based on not only benefit but cost in completing a full investigation to substantiate assumptions.

For small to medium companies this is the formula we use.

We assume a minimum of 10% increase in net profit – though in the vast majority of cases we are seeing increases of 25%-45% in as little as 90 days after implementation.



We then base our fee on a 10% improvement. Here is an example:

Company annual revenue - \$1 million yr. A 10% improvement = a net increased profit of \$100k. Our fee is 5% of that increased profit – so \$5,000. So, is a net increase of \$95k profit a year worth it? This applies only to companies with revenues of \$500k or more per year. For companies Under that, we charge a flat fee of \$3,000

We also offer a refund guarantee – if all our recommendations are properly implemented and 90 days later you have not achieved at least a 10% increase in profits, then we will 100% refund the fee. See our website for details – <https://byoboss.pro> This DOES NOT apply to large corporations only small to medium corporations.

The definition of a small to medium corporation is one with 100 or less employees and annual revenue of \$25 million or less.

Our Marketing Method:

We market in 2 ways as follows.

1. Direct marketing to business owners.
2. Building a referral network with – Business Consultants, Accountants, lenders/investors and business trade groups such as Board of Trade. We pay referral fees of 20%) So for a \$1 million company the referral fee would be \$1,000.

Interested in referring business clients to us? Email me at ken@byoboss.pro and tell me who you are, your expertise and how you plan on referring clients to us for a Business Health Checkup.

Referral Partner Expectations

If you'd like to be a referral partner, here's what we look for:

- Professional communication and timely introductions.
- Ethical prospecting and honest qualification.
- No spam lists or mass-blast introductions.
- Respect for prospect privacy and opt-in where appropriate.