



**Technology, Marketing,  
and Finance Consulting**

**The One-Stop Shop for  
Small Business**

**BOBO STRATEGY**

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## ABOUT US

Bobo Strategy® was created in 2008.

Since then, Bobo Strategy has established itself as the one-stop shop for the **technology, marketing, and finance** needs of small businesses.

Led by a **credentialed actuary**, we are the only firm in the world that provides all of these services, through the lens of a credentialed actuary - at prices within reach of many small businesses.

We increase the value of your business through practical consulting that leads to targeted, actionable insight and solutions.

We take ownership of our work. We stand behind it.

And we are consistently transparent with our advice and work product.

Please explore this brochure for more detail on the services we offer.



**Client:** E-Commerce Retailer

**Problem:** Client was losing money on shipping.

**Solution:** Identified targeted products to increase shipping on, chosen in a way to minimize the risk of reductions in sales. Analysis of granular data led to a solution that saved more than \$25,000 annually.



**Client:** Retail clothing store

**Problem:** Planning to sell store in the future. Wanted to increase its value.

**Solution:** Financial analysis of the business noted serious problems with the business model from an investor's perspective. Identified practical steps to increase the value of the business..



**Client:** Barber Shop

**Problem:** Wanted to expand to add a few new seats for new barbers. Concerned about risk.

**Solution:** Suggested a creative way of simultaneously incentivizing barbers and mitigating owner risk, that allowed for the pluses of expansion while mitigating its risk.



**Client:** Shareholder of law firm

**Problem:** Wanted to increase firm profits.

**Solution:** Identified subtle characteristics that their best clients had in common, and helped them target those types of clients more effectively.



**Client:** Health-care office

**Problem:** Employees were allocating time to tasks that could be automated. Too many errors. Everyone was frustrated.

**Solution:** Simplified existing spreadsheets and databases. Added targeted automation to reduce labor costs.

### Technology

We start by developing a deep understanding of your existing technology and processes. Then we identify targeted automation to save you time, reduce your labor costs, and reduce errors.



**Client:** Restaurant

**Problem:** Reduced waste to increase profits

**Solution:** Identified a creative approach to reducing waste through a mix of targeted incentives and subtle scheduling refinements - identified from detailed analysis of granular business data.

### Marketing

We start by finding “quick-wins” that save you literally thousands of dollars in wasted advertising spend. Then we suggest creative ideas for growth. And we implement them - taking ownership of their success.



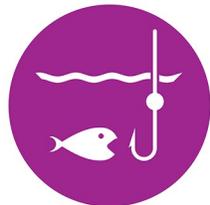
**Client:** Dance Studio

**Problem:** Needed a system to effectively manage class scheduling.

**Solution:** Built a user-friendly system, that automated scheduling. Saved \$5,000 of labor costs annually (net of our fees), while reducing error frequency.

### Finance

We help you plan business decisions and growth, with advanced financial modeling capabilities, through a lens of practical, real-world experience.



**Client:** Accountant

**Problem:** Needed new clients.

**Solution:** Initial marketing review identified substantial cost-savings through some minor targeted refinements. Then developed and implemented a profitable, highly-targeted Google AdWords campaign.



## OUR APPROACH

### Thorough and Flexible

Develop a deep understanding of your unique problem. Develop a straight-forward solution. Implement it. Be there for the long-term if you need support down the road. *And leave you alone if you don't.*

### Transparency - Why It's Important

There are some obvious reasons why transparency is important. And there are some not-so-obvious ones too.

One subtle one - is the flexibility it provides you. Transparency - with not only insight, but also the code behind technology solutions - makes it easy for you to fire us. That's important. Because if we're not the most useful solution to you on the planet, for the solutions we're delivering - you shouldn't be talking to us anymore!

We want to be continually challenged to develop more useful, more efficient products and insight. As we keep everything transparent, continuous improvement is more than just a nice idea - it's essential for our survival.



## FEEDBACK FROM ACTUAL CLIENTS

"I worked with Chris from Bobo Strategy once before and his expertise and professionalism is outstanding. He was not only knowledgeable about how to proceed but creative as well - which added tremendous value. Thanks Chris." - President, Pharmaceutical Company

"Bobo Strategy has exceeded our expectations by offering creative recommendations and impressive work. We've extended the project to take advantage of their capacity and skills." - President, Compensation Consulting Firm

"Exceptional work, communication, and reliability. Highly recommended." - Owner, E-Commerce Shop with more than \$2 million in annual sales

"Very good work. Very Satisfied." - Campaign Manager for Mayor of 100k city

