



Here, Health & Wellness Companies
Exceed Their Growth Goals

Immediate Impact Program

This consulting package is tailored for health and wellness consulting & retail businesses aiming to enhance their operational efficiency and align their technology investments with strategic objectives.

A fractional CIO from The Atwell Group will conduct a comprehensive Review of the company's objectives/values, core business processes, supporting technology, KPI's, budgets and investment planning.

Discovery - Design Thinking + Ideation Sessions

Scope of Work:

1. Interview Main Stakeholders:

- **Objective:** Complete a full inventory of business operations with supporting Process & integrated digital tech stack.
- **Action Items:**
 - Interviews with the CEO, Operations Lead, Tech Lead, and SMEs for every business area (3 x Sessions – MS Teams + Whiteboard).
 - Understand the founder's personal values, non-work-related endeavors, major life challenges/accomplishments/disappointments.
 - Identify company values and strategic objectives.
 - Identify and document core business processes & KPIs.
 - Identify and document supporting technology stack & IT infrastructure.
 - Identify and document budgets for IT and Marketing operations.
 - Identify and document communicated challenges.
- **Deliverables:**
 - Document: Business Process Map aligned to Strategic Objectives & supporting Integrated Technology.

** What you do, why you do it, how you do it, how is success measured, what does it cost you, what are your challenges **

Audit – Process, Technology + Bonus: Creative, Digital Marketing

Scope of Work:

1. Core Business Strategy Review:

- **Objective:** Review Alignment with the strategic objectives/goals, core business processes and current digital tech stack.
- **Action Items:**
 - Identify alignment gaps and additional business scaling challenges.
- **Deliverables:**
 - Document: Comprehensive gap analysis report of current state of strategic planning.

** Do your core business processes support your objectives & does your technology support your core processes **

2. Technology Stack Analysis/Audit:

- **Objective:** Analyze efficacy and value realized with current business technology investments.
- **Action Items:**
 - Identify challenges, KPIs, gaps (E.g. Automation, AI, etc.).
 - Assess the current state of technology resources (employees, vendors, contractors, and partners).
 - Review IT Internal security practice (Customer Data Security).
 - Review technology investment budget & ROI.
- **Deliverables:**
 - Document: Comprehensive gap analysis report & current state technology capability assessment.

** Are we using the right types of tools, are the tools we've invested in the best in class, do we have all the tools needed **

3. Business Data & BI Analysis/Audit:

- **Objective:** Evaluate the use of data visualization and reporting tools like Excel, PowerBI, Tableau, and Domo.
- **Deliverables:**
 - Business value data and visualization capability assessment

** Can we capture and report on all relevant business data for business value review and improvements **

4. Core Business SWOT Analysis:

- **Objective:** S.W.O.T analysis on core business based on audit data collected.
- **Action Items:**
 - **Strengths:**

- Identify and document the strengths of the company's core business processes.
- Report on the effectiveness of current process supporting technology investments.
- **Weaknesses:**
 - Highlight areas where business processes and technology may be lacking or inefficient.
 - Report assessing gaps in the technology investment budget.
- **Opportunities:**
 - Identify potential areas for improvement and innovation in business processes and technology.
 - Suggest opportunities for optimizing technology investments to better support strategic objectives.
- **Threats:**
 - Analyze external and internal threats that could impact business processes and technology.
 - Provide risk mitigation strategies.
- **Deliverables:**
 - Document(s): Comprehensive SWOT analysis report & business capability statement.

5. Presentation of Findings, Roadmap & Recommendations:

- **Objective:** Present findings and provide a technology roadmap with planning, budget, execution recommendations.
- **Deliverables:**
 - Power Point Presentation Session
 - Zip folder with all documents produced from program deliverables.

Timeline(s):

- **Cost:** \$6785 USD (\$9750 CAD + HST)
- **Discovery:** 1 Week
 - **Design Thinking + Ideation Sessions:** 3 x 1 – 2 hour sessions
- **Audit:** 1 Month (40 hours)
 - **Business Strategy Review:** 10 days
 - **Technology Stack Analysis/Audit:** 10 days
 - **Business Data & BI Analysis/Audit:** 5 days
 - **Presentation of Findings, Roadmap & Recommendations:** 1 days

Bonus: Audit – Digital Marketing Operations

This offer includes a Digital Marketing Audit of your business, by our strategic partners [Digital Darts](#), covering SEO, Social Media (FB/IG Business Manager), and Google Ads Build, valued at **\$1500 USD**.

Deliverables
Evaluation of Current State: Performance, strategy, and setup. Recommendations: Immediate and short-term improvements. Resource Capacity Assessment: For executing recommendations. Google Ads Review: Setup and tracking of conversion goals. Optimization of ad groups, keywords, and bidding strategies. Ad creative improvements and dynamic remarketing. Budget allocation to profitable campaigns. Facebook Ads: Audience creation and targeting. Dynamic product ads and retargeting strategies. SEO Audit Technical SEO evaluation. On-page SEO improvements. Off-page SEO strategies. Traffic and Keyword Analysis: Evaluation of traffic sources and trends. Recommendations for traffic quality improvement. Competitor Analysis: Benchmarking traffic sources, SEO strategies, and backlink profiles. Results: Presented in PDF or presentation.

* Included with 30 Day immediate impact program – Turnaround Time: 48 hours *

Bonus: Audit – Business Creative Collateral

This offer includes a Creative Digital Media Audit, by our strategic partner [Peerpoint Lincoln](#), focusing on front-facing digital creative media assets, valued at **\$1500 USD**.

Deliverables
Assessment of digital creative assets: Visual, audio and brand story. Actionable suggestions: Immediate and short-term asset optimization. Resource Capacity Assessment: For executing recommendations. Results: Presented in PDF or Loom video.

* Included with 30 Day immediate impact program – Turnaround Time: 48 hours *

To discuss how The Atwell Group can transform your business, please contact us at:

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