

KNOWING EXACTLY HOW TO ELEVATE YOUR COMPANY TO THE NEXT LEVEL.

THAT'S THE POWER OF CLEAR INSIGHT.



Clear Financials.



Clear Direction.



Clear Success.



INTRODUCTION

Getting The Roadmap To The Next Stage Of Growth

You've had an early taste of success. You've cleared hurdles and passed several critical tests and you've experienced and overcome the trials and tribulations of bringing to life a successful startup.

There's a lot to feel good about. So what's the problem?

Unfortunately, you're also about to hit the wall that so many business owners and founders do, if you haven't already. As you're striving to scale up and take that all-important leap to the next stage of growth, business is beginning to stall. You began the journey with energy and enthusiasm and plenty of heart, but it's become much harder to recognize your best opportunities and things don't seem as efficient as they used to be. You feel like you are heading into a tailspin instead of soaring to greater heights. But that's not the worst of it.

- Deals aren't closing at the high rate they once were
- Payroll is getting made, but just barely
- What was a clear path when you started is now fuzzy and confusing.

It's easy to feel alone in this moment when solutions seem limited and you're too close to the problem to know what to do next.

You need to find your way. The good news?

***You're Not Alone.
Clear Insight Can Show You The Way.***

ABOUT US

Welcome To A New Day.

Fast forward to a new stage in your business – the next step you dreamed of reaching and began to wonder if you ever could. Here you are, staring at growing revenues, increased sales, realized cost savings and even more hours per week put back on your desk to focus on what matters for a true owner like yourself. You are working on your business, not just in your business. Best of all, you're moving forward with the kind of confidence in your financials that you never had before. That kind of confidence means you know your options, are making better decisions and are living with less stress.

Clear Insight is the bridge to this exciting future for your business. We're a financial powerhouse of Part-time CFOs, accountants, bookkeepers, business consultants, technical consultants and project managers who help small and medium-sized businesses. We understand SMB's because all of our CFO's have been or are entrepreneurs. We are entrepreneurs helping entrepreneurs. Companies that have engaged with us have:

- **Realized up to 30% improvement in revenues, sales and cost savings within the first 12 months**
- **Saved up to 10 hours per week for owners and managers**
- **Achieved greater focus on the business through better KPI tracking and financials**

You might assume having a group of well-seasoned CFO and business advisory professionals who can achieve results like this would also come with a high price tag. Not with Clear Insight. Compared to an in-house CFO that could cost you as much as \$500,000 per year, Clear Insight is only a fraction of the cost – between \$25,000 to \$50,000 per year – but delivering the same or better results. When it comes to business value, there's just no comparison.



Susan Malik, President Clear Insight

Susan is the President of Clear Insight with overall responsibility for the vision and strategic direction of the company. Susan provides leadership and management with a specific focus on client success, business development and marketing.

Susan has over 25 years of experience as a successful entrepreneur, founding and developing several companies in Canada and the United States. She has a wide range of business expertise in such diverse areas as information systems, banking/finance, management consulting, training and education.

OUR APPROACH

Get Clear On So Much More Faster.

You may have felt the business was leveling off, but without a clear understanding as to why. You need to level up to run your business at the scale that you've always imagined. How do we do that? With an action plan from Clear Insight that's tailored for you. You need a **Clear Direction** specific obstacles supported by **Clear Financials** to lead you to **Clear Success**. Here's what we mean by that.

CLEAR FINANCIALS

Getting Control Of The Numbers

If you don't know your numbers, you don't really know your business. Let's start here by getting a firm handle on your financials and creating a solid, easily understood plan that reflects the state of your business. No more guesswork. Clear Insight is here to:

- Set and manage KPIs
- Forecast cash flow
- Analyze financial statements
- Manage banking relationships
- Work closely with your accountant and lawyer
- Train existing accounting staff if necessary

With our team leading the charge to arrive at your Clear Financials, no stone is left unturned and nothing falls through the cracks as we uncover all the numbers that tell the real story of your business. It's a story of your business you'll be able to grasp firmly and look forward to understanding rather than avoiding. And that confidence feels very good.

CLEAR DIRECTION

Real, Practical Business Advice

The plan for growth requires strategy, focus, discipline and flawless execution. So let's go beyond the numbers to provide you with the best partner you could ask for. We're talking about a deep resource who serves as your sounding board, a trusted advisor and a voice of reason who has been an entrepreneur themselves and walked a mile in your shoes.

Enter Clear Insight. We place a highly experienced Part-time CFO to align with your executive leadership team. When numbers bring more questions than answers, you'll have not only an expert on-demand but also an expert who knows how to frame the answers in the practical, understandable context of your business. Straight talk in terms you understand, based on experience. That's what a Clear Direction from us is all about.

CLEAR SUCCESS

With a path forward and the right partner from our team by your side, you can take on the myriad of challenges your business will face with confidence. This is the point of Clear Success. Welcome to clarity for today, tomorrow and the future in which you realize that reaching your goals is entirely attainable. Like other Clear Insight customers who have seen significant improvements in their business's financial aspect, from increased revenue to reduced operating costs.

PART-TIME CFO SERVICES

There Are Some Things Only You Can Do.
Being CFO Isn't One Of Them.

Did you start your business so you could become an accountant? So you could spend more time than ever with spreadsheets and putting together financial forecasts? We didn't think so.

Fortunately, Clear Insight supplies you with a **Part-time CFO** who is so much more than an expert in financials. Your Part-time CFO drills down to quantify who your most profitable customers are, your cost per lead, your level of profit per employee and any more key metrics. We can also look at funding sources to raise capital and identify any traps or pitfalls and ensure your business is in compliance.

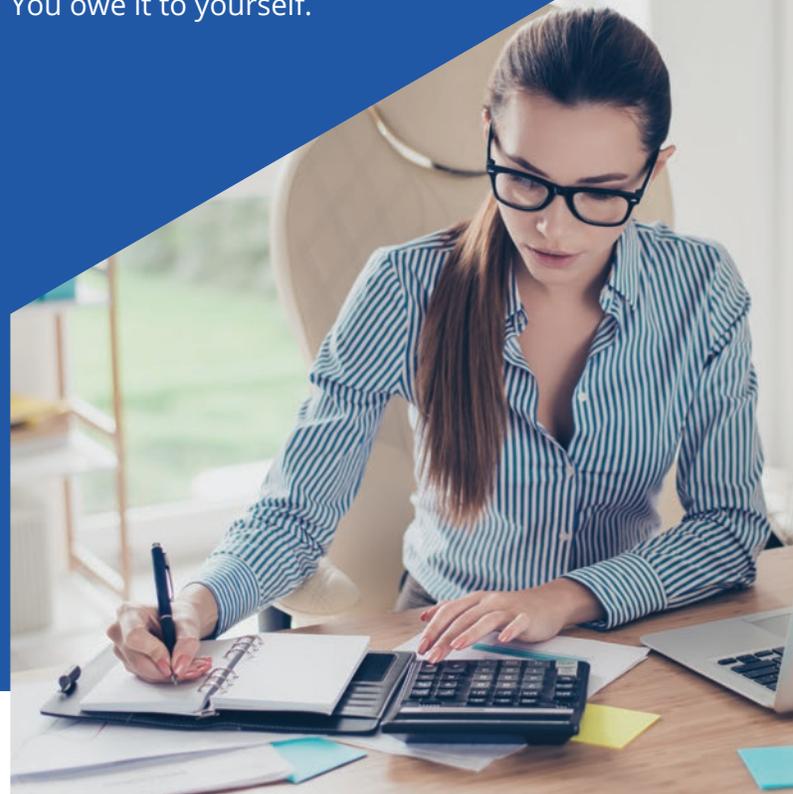
For the first time, you have a financial expert advocating for your success who understands all the challenges of running a business. It goes so far beyond just financial reporting, creating financial structures, improving cash flow and more.

Clear Insight is a partner who can help you:

- Convey the value you're bringing to employees, investors and customers.
- Show employees the "big picture" of how they each have a role that impacts the business financially
- Make more effective decisions based on the true, accurate financial health of your firm.

With access to a Part-time CFO from Clear Insight, you will have the added benefit of putting invaluable time back on your calendar, focus back on your highest priorities and energy reserves back into your life.

Talk to us about how a **Clear Insight Part-time CFO** can partner with you. You owe it to yourself.



LEADERSHIP

What Drives Us To Work Harder For Entrepreneurs? The Fact That We're All Entrepreneurs Too.

Partnering with someone who has been in your shoes really matters. Clear Insight is uniquely positioned to fully appreciate what it means to be an entrepreneur.

[How so? Start with our leadership.](#)

It's easy to be intensely passionate about entrepreneurs' success when you've directly lived and breathed the entrepreneurial life the way Clear Insight's President Susan Malik has.

Susan is anything but your typical CFO. Having founded and developed seven different businesses primarily in Canada and

the United States, Susan's over 25 years of entrepreneurial experience has touched a variety of areas, including information systems, data analytics, executive healthcare, liquid waste management, professional consulting services and training services.

Susan has successfully exited those businesses and is now focused on building Clear Insight. The largest of those exits being a professional services consulting company of over 70 consultants. She knows what it means to be the new kid on the block, taking on established firms and being successful doing it.

Our team at Clear Insight knows what it takes to give everything you have to commit to a vision and team of employees. We know the high satisfaction of winning new business and the point where we couldn't get any lower in having to let people go. We are entrepreneurs helping entrepreneurs.



NEXT STEPS

If the prospect of Clear Financials, Clear Direction and Clear Success coming together to change your business dramatically excites you, then you'll definitely want to take the next step to meet Clear Insight through a discovery session and complete a Business Insights Assessment.

Here's how that happens:

1. Schedule your Discovery Session with one of our Part-time CFOs from Clear Insight at (647) 618-1191.

We'll discuss your goals and what is preventing you from reaching those goals. We will discuss your successes and those initiatives that did not hit the mark. Understanding your company culture is critical and understanding the market forces and your personal drivers will help us to better understand how we can help you.

2. We'll work with you and your team to conduct an initial Business Insights Assessment to identify your main challenges that need to be tackled.

These challenges involve but are not limited to cash flow, invoicing, collections, sales pipelines, business plans, tax filing compliance, HR policies, payroll, key contracts and covenants, insurance documents, automation, and other risk areas.



3. We'll walk you through our Business Insights Assessment to not only explain the challenges before you but how you should specifically address them.

Compiling all of your key metrics and benchmarking them against industry standards will result in your company's financial health score. We now have what it takes to provide you a series of customized recommendations and an exact roadmap to your goals.

The next era of remarkable growth for your business awaits you.

Clear Insight. Entrepreneurs Helping Entrepreneurs.