

**A ready-to-use blueprint for the first prototype of
the "UBB Enterprise Health Check".**

Here are the 6 diagnostic pillars + example questions + scoring approach:

A. UBB Enterprise Health Check – Pillars & Sample Questions

1. *Finance & Cash Flow*

**Q1: Do you have up-to-date financial statements (P & L, Balance Sheet, Cash Flow)?*

- * [] No records
- * [] Basic records, not updated
- * [] Updated quarterly
- * [] Updated monthly

**Q2: How many months of cash reserves can your business cover?*

- * [] < 1 month
- * [] 1–3 months
- * [] 3–6 months
- * [] > 6 months

2. *Operations & Processes*

**Q1: Are your business processes documented?*

- * [] Not at all
- * [] Some processes only
- * [] Most processes documented
- * [] Fully standardized & automated

**Q2: How do you monitor operational efficiency?*

- * [] No monitoring
- * [] Ad-hoc checks
- * [] Regular reviews
- * [] Data-driven KPIs

3. *Sales & Marketing*

**Q1: How do you generate leads/customers?*

- * [] Mostly word of mouth
- * [] Some irregular marketing
- * [] Structured campaigns (social, email, etc.)
- * [] Integrated sales + marketing strategy with KPIs

**Q2: Do you track customer retention and lifetime value?*

- * [] No
- * [] Basic tracking (spreadsheets)
- * [] Regular monitoring
- * [] Advanced analytics + CRM system

4. *People & HR*

**Q1: Do you have clear job descriptions and performance reviews?*

- * [] No
- * [] Partial / informal
- * [] Regular reviews for key roles
- * [] Systematic across all staff

**Q2: Do you invest in staff training & development?*

- * [] Never
- * [] Occasionally
- * [] Annual training plan

* [] Continuous training program

5. *Strategy & Governance*

*Q1: * *Do you have a documented business strategy/plan?*

- * [] None
- * [] Informal ideas only
- * [] Written plan, not regularly updated
- * [] Clear, updated plan with monitoring

*Q2: * *How often does leadership review business performance?*

- * [] Never
- * [] Occasionally
- * [] Quarterly
- * [] Monthly

6. *Technology & Digital Readiness*

*Q1: * *What role does technology play in your business?*

- * [] Very limited
- * [] Basic (emails, spreadsheets)
- * [] Core systems in place (accounting, CRM, ERP)
- * [] Advanced digital tools integrated across functions

*Q2: * *Do you have a cybersecurity/data protection policy?*

- * [] None
- * [] Basic informal practices
- * [] Formal policy, not enforced
- * [] Fully implemented + staff trained

B. Scoring Framework

- * Each question = 0 to 3 points (worst → best).
- * Each pillar total = (average score × 25). → Out of 100.
- * Overall Health Score = Average of all pillars (out of 100).
- * Color Coding:

Red (0–39): Critical

Amber (40–69): Needs Improvement

Green (70–100): Healthy

3. Freemium vs. Premium

Free:

* Overall Health Score + Pillar radar chart + 2 generic recommendations.

Premium:

* Detailed report (per-pillar insights, tailored action steps, benchmarking vs. peers).

* Optional paid *UBB Expert Consultation*.

⚡ This is lightweight enough for developers to implement in *2 weeks of coding*.

Let's design the *mockup concept* for the *UBB Enterprise Health Check report* so the developers and designers can immediately picture what the output looks like (both dashboard and PDF).

A. Mockup Concept – UBB Enterprise Health Check Report

1. *Dashboard (On-Screen Results)*

Header:

* Logo UBB + Title: **“UBB Enterprise Health Check – Results”**

* Company Name + Date

Section A – Overall Score

* Big circular progress indicator with % (e.g. **62/100 – Amber Zone**)

* Label: “Your business health is *developing but needs strengthening*.”

Section B – Pillar Breakdown (Radar Chart or Bar Graph)

* Radar chart with 6 axes: Finance, Operations, Sales & Marketing, People & HR, Strategy & Governance, Technology.

* Each pillar is color-coded (Red / Amber / Green).

Section C – Quick Insights (Freemium)

* 2–3 **automated generic tips**. Example:

* “Improve cash flow monitoring with monthly statements.”

* “Document and standardize your key processes.”

* Button: “**Get Full Report**” → Premium upsell.

2. *PDF Report (Download / Email Attachment)*

Page 1 – Cover

- * UBB branding (colors, logo, Ubuntu-inspired visuals).
- * Title: *UBB Enterprise Health Check*
- * Subtitle: *Free Self-Assessment Report*
- * Company name + Date

Page 2 – Executive Summary

- * Overall score (big gauge / circular chart).
- * One-line diagnosis (“Your enterprise is in the *Amber zone*, with strengths in Marketing but weaknesses in Finance & Governance.”).

Page 3 – Pillar Results

Table or chart:

Pillar	Score (/100)	Status
Finance & Cash Flow	40	Amber
Operations & Processes	55	Amber
Sales & Marketing	75	Green
People & HR	60	Amber
Strategy & Governance	35	Red
Technology Readiness	50	Amber

Page 4 – Recommendations (Freemium)

- * 2–3 short, **generic suggestions**.

Premium Teaser Block (always shown in free PDF):

> “Unlock your *Full Enterprise Health Report* with UBB – including tailored recommendations, benchmarking against peers, and a consultation call with our experts.”

* CTA button/QR code: *Book Your Full Report*

3. *Premium Report (Paid Upgrade)*

- * Detailed insights per pillar (customized text blocks).
- * Benchmarks: “Compared to SMEs in your sector, your Finance score is 20% below average.”
- * Action plan roadmap (short, medium, long-term steps).
- * Option to schedule an advisory session with UBB.

Design Style:

- * Minimalist, modern, professional (clean charts, no clutter).
- * Colors: Ubuntu-inspired palette (Orange, Green, Blue accents).
- * Fonts: Clear sans-serif (Open Sans, Lato, or similar).

This mockup is **conceptual**, but developers can quickly build it using:

- * **Charts:** Recharts or Chart.js (for radar, bar, circular gauge).
- * **PDF Export:** jsPDF or Puppeteer (for styled PDF generation).

Let’s draft the exact content blocks for the “generic recommendations” (per pillar) so that the developers have sample texts to plug into the MVP right away?

A ready-to-use library of generic recommendations for each of the 6 pillars. These can be plugged straight into the MVP as “default improvement tips” (freemium level).

A. Generic Recommendations – UBB Enterprise Health Check

1. *Finance & Cash Flow*

- * Keep “monthly financial statements” (P & L, Balance Sheet, Cash Flow).
- * Set up a *cash flow forecast* for at least 3–6 months.
- * Separate *business and personal accounts* to avoid confusion.

2. *Operations & Processes*

- * Document core processes (sales, procurement, customer service).
- * Identify 1–2 processes to “standardize or automate” first.
- * Establish simple “KPIs” (e.g., order fulfillment time, error rates).

3. *Sales & Marketing*

- * Develop a “basic marketing plan” with clear customer segments.
- * Use “digital channels consistently” (social media, email, Google Business).
- * Track “customer retention” (returning clients, repeat purchases).

4. *People & HR*

- * Write “clear job descriptions” for all key roles.
- * Hold “regular staff check-ins or reviews” (monthly or quarterly).
- * Introduce “basic training programs” (customer service, digital skills, compliance).

5. *Strategy & Governance*

- * Draft a *one-page business plan* with vision, goals, and milestones.
- * Schedule *quarterly reviews* to measure progress.
- * Create a simple *board or advisory group* for accountability.

6. *Technology & Digital Readiness*

- * Move beyond spreadsheets: adopt *basic business software* (accounting, CRM, POS).
- * Back up important data regularly (cloud or external drive).
- * Implement *strong passwords and basic cybersecurity practices*.

B. How to Use in the MVP

- * Freemium Report:* Show *2–3 tips randomly selected* per pillar (from the above).
- * Premium Report:* Show *all relevant tips* + tailored text blocks (later).
- * Devs can structure it as a JSON file or database table for easy expansion later.

Let's design the *scoring thresholds* (e.g., which recommendation sets appear depending on Red/Amber/Green status per pillar) so the tool feels more personalized right from version 1?

Ready-to-use library of generic recommendations

A *ready-to-use library of generic recommendations* for each of the 6 pillars. These can be plugged straight into the MVP as *default improvement tips* (freemium level).

A. Generic Recommendations – UBB Enterprise Health Check

1. *Finance & Cash Flow*

- * Keep *monthly financial statements* (P&L, Balance Sheet, Cash Flow).
- * Set up a *cash flow forecast* for at least 3–6 months.
- * Separate *business and personal accounts* to avoid confusion.

2. *Operations & Processes*

- *Document core processes* (sales, procurement, customer service).
- * Identify 1–2 processes to *standardize or automate* first.
- * Establish simple *KPIs* (e.g., order fulfillment time, error rates).

3. *Sales & Marketing*

- * Develop a *basic marketing plan* with clear customer segments.
- * Use *digital channels consistently* (social media, email, Google Business).
- * Track *customer retention* (returning clients, repeat purchases).

4. *People & HR*

- * Write **clear job descriptions** for all key roles.
- * Hold **regular staff check-ins or reviews** (monthly or quarterly).
- * Introduce **basic training programs** (customer service, digital skills, compliance).

5. *Strategy & Governance*

- * Draft a *one-page business plan* with vision, goals, and milestones.
- * Schedule *quarterly reviews* to measure progress.
- * Create a simple *board or advisory group* for accountability.

6. *Technology & Digital Readiness*

- * Move beyond spreadsheets: adopt *basic business software* (accounting, CRM, POS).
- * Back up important data regularly (cloud or external drive).
- * Implement *strong passwords and basic cybersecurity practices*.

B. How to Use in the MVP

Freemium Report: Show *2–3 tips randomly selected* per pillar (from the above).

Premium Report: Show *all relevant tips* + tailored text blocks (later).

*Developers can structure it as a JSON file or database table for easy expansion later.

Let's also design the *scoring thresholds* (e.g., which recommendation sets appear depending on Red/Amber/Green status per pillar) so the tool feels more personalized right from version 1?

Let's add *scoring thresholds* per pillar so the tool feels more "personalized" even in the freemium version.

Here's a simple framework that developers can *hard-code into the MVP logic*:

B. Scoring Thresholds & Recommendation Logic

Pillar Score Bands

Red (0–39): Critical Zone

→ Show *foundational recommendations* (basic fixes, survival essentials).

Amber (40–69): Needs Improvement

→ Show *intermediate recommendations* (systematize, strengthen).

Green (70–100): Healthy

→ Show *advanced recommendations* (optimization, growth scaling).

1. *Finance & Cash Flow*

Red: Start keeping monthly records, separate personal & business finances.

Amber: Build 3–6 month cash forecast, track receivables more closely.

Green: Explore funding options, build financial dashboards, plan for growth.

2. *Operations & Processes*

Red: Document at least your core processes (sales, procurement).

Amber: Standardize workflows, add simple KPIs.

Green: Automate processes, implement ERP/advanced management tools.

3. *Sales & Marketing*

Red: Define target customers, set up basic digital presence (Google, social).

Amber: Launch structured campaigns, track leads systematically.

Green: Optimize customer lifetime value, use CRM + analytics.

4. *People & HR*

Red: Define roles & responsibilities clearly.

Amber: Introduce regular reviews + training budget.

Green: Build leadership pipeline, implement HR software.

5. *Strategy & Governance*

Red: Write down a one-page plan (vision, goals, 12-month roadmap).

Amber: Hold quarterly performance reviews.

Green: Set up an advisory board, use strategic KPIs, scenario planning.

6. *Technology & Digital Readiness*

Red: Adopt basic software (accounting, POS).

Amber: Backup data, formalize cybersecurity basics.

Green: Integrate systems (CRM + ERP), explore automation & AI.

Developer Implementation

* Each pillar question = 0–3 points.

* Average pillar score → assign *status* (Red/Amber/Green).

* Based on status → pull *2–3 matching recommendations* from the library.

* For *premium version* → show *all records* across all levels, with added depth.

This creates a *personalized feel from Day 1* — even though the logic is simple, SMEs will see advice matched to their situation.

A *sample JSON structure* for developers

This is for using as the *data model* for the MVP. It enables developers to code faster without guessing the data model?

It covers *questions, scoring, thresholds, and recommendations* — all in one flexible format.

1. Sample JSON Schema – UBB Enterprise Health Check

```
```json
{
 "pillars": [
 {
 "id": "finance",
 "name": "Finance & Cash Flow",
 "questions": [
 {
 "id": "f1",
 "text": "Do you have up-to-date financial statements (P&L, Balance Sheet, Cash Flow)?",
 "options": [
 {"label": "No records", "score": 0},
 {"label": "Basic records, not updated", "score": 1},
 {"label": "Updated quarterly", "score": 2},
 {"label": "Updated monthly", "score": 3}
]
 },
 {
 "id": "f2",
 "text": "How many months of cash reserves can your business cover?",
 "options": [
 {"label": "< 1 month", "score": 0},
 {"label": "1–3 months", "score": 1},
 {"label": "3–6 months", "score": 2},
 {"label": "More than 6 months", "score": 3}
]
 }
]
 }
]
}
```

```
 {"label": "> 6 months", "score": 3}
]
}
],
"recommendations": {
 "red": [
 "Start keeping monthly records.",
 "Separate personal and business finances."
],
 "amber": [
 "Build a 3–6 month cash forecast.",
 "Track receivables more closely."
],
 "green": [
 "Explore funding options for growth.",
 "Use financial dashboards to monitor KPIs."
]
}
},
{
 "id": "operations",
 "name": "Operations & Processes",
 "questions": [
 {
 "id": "o1",
 "text": "Are your business processes documented?",
 "options": [
 {"label": "Not at all", "score": 0},
 {"label": "Some processes only", "score": 1},
 {"label": "Most processes documented", "score": 2},
 {"label": "Fully standardized & automated", "score": 3}
]
 },
 {
 "id": "o2",
 "text": "How effective are your operations processes?"
 }
]
}
```

```
"text": "How do you monitor operational efficiency?",
"options": [
 {"label": "No monitoring", "score": 0},
 {"label": "Ad-hoc checks", "score": 1},
 {"label": "Regular reviews", "score": 2},
 {"label": "Data-driven KPIs", "score": 3}
]
}
],
"recommendations": {
 "red": [
 "Document at least your core processes."
],
 "amber": [
 "Standardize workflows and add simple KPIs."
],
 "green": [
 "Automate processes and consider ERP systems."
]
}
}
],
"scoring": {
 "thresholds": {
 "red": [0, 39],
 "amber": [40, 69],
 "green": [70, 100]
 },
 "logic": "Average question scores × 25 = pillar score. Overall score =
mean of all pillar scores."
}
}
...
}
```

## **2. How Devs Can Use It**

1. \*Load questions\* dynamically from JSON → display in UI.
2. \*Capture answers\* → assign scores.
3. \*Calculate pillar average × 25\* → compare against thresholds.
4. \*Pull recommendations\* from JSON according to status (red/amber/green).
5. \*Render results\* in dashboard + export to PDF.

This structure is \*modular\*: developers can easily add new pillars, more questions, or swap recommendations without touching the logic.

Let's map the \*onboarding flow\* for the **\*UBB Enterprise Health Check\*** so developers know exactly how users will move through the tool. This keeps it \*simple, professional, and lead-gen optimized\*.

## User Journey – UBB Enterprise Health Check

### ***Step 1 – Welcome / Landing Page***

\*Purpose:\* Capture attention + encourage participation.

\*Header:\*

\* UBB Logo + Title: **“UBB Enterprise Health Check”**

\*Tagline:\*

**“Is your business fit to grow? Take this free 10-minute self-assessment and discover your company’s health score.”**

\*Call-to-Action (CTA):\*

\* Button: \* **“Start Your Free Health Check”**

\* Form fields (before starting):\*

\* Company name

\* Sector / Industry (dropdown)

\* Company size (micro / SME / large SME)

\* Contact email (required to receive report)

### ***Step 2 – Questionnaire***

\*Purpose:\* Collect data pillar by pillar in a user-friendly way.

**\*Structure:**

- \* \~12–15 questions (2 per pillar, MVP).
- \* Progress bar at top (“30% Complete”).
- \* One question per screen (or 2 max) → keeps focus.

**\*Controls:**

- \* Multiple-choice (radio buttons).
- \* “Next” / “Back” navigation.

***Step 3 – Processing Screen (Short Delay)***

**\*Purpose:** Builds anticipation, feels premium.

**\*Message Example:**

“Analyzing your responses... Generating your Enterprise Health Score...”

**\*Visual:**

- \* Simple animated progress bar / pulse loader with UBB branding.

***Step 4 – Results Dashboard (On-Screen)***

**\*Purpose:** Deliver instant value + tease premium.

**\*Section A – Overall Score:**

- \* Circular gauge (e.g. 62/100 – Amber).
- \* Short insight text: “Your enterprise is developing but needs strengthening in Finance & Governance.”

**\*Section B – Pillar Breakdown:**

- \* Radar chart or bar chart.
- \* Each pillar is color-coded Red/Amber/Green.

**\*Section C – Recommendations (Freemium):\***

- \* 2–3 auto-selected tips per weak pillar.

**\*CTA Upsell Block:\***

- \* Banner: “Get your full tailored report + UBB expert consultation.”
- \* Button: “Unlock Premium Report”

***Step 5 – Report Delivery***

**\*Purpose:\*** Ensure lead capture + drive follow-up.

- \* Email sent automatically with PDF attachment (Free version).
- \* Free report includes:
  - \* Cover page (branding, date, company name).
  - \* Overall score + chart.
  - \* Pillar scores + generic tips.
  - \* Premium teaser page at the end (benchmarking, tailored roadmap, advisory offer).

***Step 6 – Premium Conversion Path***

**\*Purpose:\*** Monetize leads.

**\*On Dashboard + PDF teaser:\***

- \* CTA → “Book My Full Report” → Payment or Consultation booking page.

**\*Optional incentive:\*** First 20 users get a free 15-min consultation.

## UX Guidelines

\*Tone:\* Supportive, professional, non-judgmental.

\*Colors:\* Red/Amber/Green for clarity, balanced with UBB orange/blue.

\*Layout:\* Mobile-first (most SMEs will open on the phone).

\*Time:\* Keep total completion under \*10 minutes\*.

With this flow, one has a \*polished MVP funnel\*: attract → engage → diagnose → deliver value → upsell.

Here is a one-page wireframe (visual layout) of this flow (Landing → Questionnaire → Dashboard → Report) so developers and designers can see it at a glance before coding?

