



PBS TRUPEER HOT SEAT

Proficient Business Services Ltd.

Enabling Human Potential

Presented by Chenson Johnson, Acting Chief Visionary Officer (CVO)

Founder and Executive Chairman: Montino Roberts

[Hot seat meeting date] | TruPeer POD [POD number]

www.pbshope.com





What We Need From the Group

- 1 Where should PBS focus its broad service portfolio to grow profitably without adding complexity?
- 2 What is the right balance between managed services, other recurring revenue and project work?
- 3 What leadership, accountability and sales structure will carry PBS through its next stage of growth?

Proposed — confirm with Montino



Founder and Company Journey



Montino Roberts
Founder & Executive
Chairman

Why Montino started PBS

[Founding motivation — Montino to supply]

Personal turning points

[Key lessons and moments — Montino to supply]

- 2003**
PBS established
- 2019**
RBPF Real Time Crime Center network & integrated security
- 2024**
Providence Advisors pension platform modernization
- 2025**
University of The Bahamas cybersecurity response & roadmap

Purpose and PBS Today



Vision

To leverage technology to ensure that our solutions enable human potential.

Mission (summary)

Technology that works seamlessly with people, delivered with legendary service and enduring value.

Values and reach

- Integrity • Service • Excellence
- The Bahamas, wider Caribbean and beyond — est. 2003, 100% Bahamian-registered

[#]

Employees

[#]

Active clients

[#]

Managed users / endpoints

Snapshot figures to confirm





Service Model and Target Client

[Pillar 1]

[Short description from pbshope.com]

[Pillar 2]

[Short description from pbshope.com]

[Pillar 3]

[Short description from pbshope.com]

[Pillar 4]

[Short description from pbshope.com]

Target industries

- Healthcare and financial services
- Government and public safety
- Education
- Organizations running mission-critical systems

Ideal client

- Size: [users / sites / annual spend]
- Selection criteria: [criteria]
- Services offered ≠ services in each contract

Pillar names and ideal-client criteria to confirm



Leadership and Organization



Left to right

Ethan Munnings

Chief Technical & Solutions Architect

Montino Roberts

Founder & Executive Chairman

Lorna Pierre

Chief People & Service Experience Architect

Chenson Johnson

Acting Chief Visionary Officer (CVO)

Hedlease Smith

Chief Operations & Financial Officer

Headcount: [#] • Reporting lines to confirm



Financial Review

Revenue stream	Per month, Q3	Note
Core managed services (MRR)	243,521	Same each month — confirm
Other recurring revenue (ORR)	394,312	Same each month — confirm
Project labour (NRR)	250,000	Same each month — confirm
Product sales	9,275 – 20,031	Varies by month

Reporting period: Q3 2026 (July–September)
Currency: [Reporting currency] • As of: [date]

Preliminary — pending Finance validation

Historical trend

- Revenue by year: [FY–2] [FY–1] [FY]
- Gross profit trend: []
- Net profit trend: []
- Finance to supply



Sales, Retention and Service Delivery

Sales activity

- Appointments and proposals: [Q3 totals]
- New agreements: [#] • New-client MRR: []

Recurring revenue movement

- Existing-client growth: []
- Decreases and lost MRR: [] • Lost agreements: [#]

Client retention

- Retention rate: []
- Average client tenure: []

Service and project delivery

- Support response / resolution: []
- Projects on time and on budget: []

Not yet supplied — blank does not mean zero



Our Double-Edged Sword

Strength

- Broad capability across managed services, cybersecurity, infrastructure, cloud and consulting
- Trusted on complex, mission-critical work

Related risk

- Operational complexity across many service lines
- Focus, resources and delivery discipline spread thin

Evidence

[Examples or data — to supply]



Short-Term Vision

Business outcome	Measure	Deadline
Clear service focus agreed (proposed)	[Measure]	[Date]
Defined ownership for every executive priority (proposed)	[Measure]	[Date]
Project tracker pilot live with first teams (proposed)	[Measure]	[Date]
[Outcome 4]	[Measure]	[Date]

Proposed — confirm with Montino



Long-Term Vision

Business and revenue model

[Target mix of MRR / ORR / projects / products]

Financial goals

[Revenue and profitability targets]

Leadership and staffing

[Structure, headcount, succession]

Client experience

[Service levels and satisfaction]

Montino's future role

[Intended role in three years]

Targets to be approved



Next 12 Months: Strategic Objectives

Objective	Target	Owner	Deadline	Supports
Sharpen service-line focus	[]	[]	[]	Revenue model
Clarify executive accountability	[]	[]	[]	Leadership
Strengthen project delivery and reporting	[]	[]	[]	Client experience
Build a repeatable sales process	[]	[]	[]	Financial goals
[Objective 5]	[]	[]	[]	[]

Proposed — confirm with Montino



Burning Issue 1: Focus vs. breadth of our services

Problem and evidence

[Data or examples]

Business impact

[Revenue, margin, clients, team]

Suspected causes

[Root causes]

Actions already tried

[What we've done]

Options / proposed solution

[Option A / B]

Question for peers

If we narrowed to our two strongest service lines for the next 24 months, which would you choose — and what would you stop?



Burning Issue 2: Recurring vs. project revenue

Problem and evidence

[Data or examples]

Business impact

[Revenue, margin, clients, team]

Suspected causes

[Root causes]

Actions already tried

[What we've done]

Options / proposed solution

[Option A / B]

Question for peers

What target mix of MRR, ORR and project revenue would you aim for, and what tradeoff would you accept to get there?



Burning Issue 3: Project execution

Problem and evidence

[Data or examples]

Business impact

[Revenue, margin, clients, team]

Suspected causes

[Root causes]

Actions already tried

[What we've done]

Options / proposed solution

[Option A / B]

Question for peers

Which one change — discovery, scope control, resourcing or reporting — would you prioritize first, and why?



Peer Feedback and Next Steps

What should we prioritize?

Which assumption should we reconsider?

What should we stop or change?

What needs clarification?

Recommendation	Owner	Follow-up date

Note taker: [Name] Thank you for your insight and candour.



Internal Review Checklist and Sources

Montino

- Approve peer questions
- Founding story, turning points
- Select burning issues + evidence
- Confirm double-edged sword
- 3-year targets, future role

Finance (Hedlease)

- Currency and as-of date
- Validate Q3 SMART Numbers
- July ORR COGS; payroll split
- Historical revenue and profit
- Sales and MRR-change fields

Chenson / team

- Meeting date, POD number
- Headcount, clients, endpoints
- Total I.T. CARE™ pillar names
- Delivery and retention metrics

Unresolved conflicts

PHA project year 2018 vs 2008 • Purpose wording: profile vs 2025 deck • 'Level 9' rating unverified • Source: www.pbshope.com