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I N A R A

FINANCIAL CORPORATION

CASE STUDY



HOW BETTER FINANCIAL VISIBILITY HELPED A FITNESS BUSINESS IMPROVE PROFITABILITY, RESTRUCTURE OPERATIONS, AND PREPARE FOR SALE

Client	Fitness & Wellness Gym
Location	Okanagan, BC
Team	One location with coaching and admin staff

The Situation

As the owner shifted from running a passion project to building a more profitable and sustainable business, he realized he lacked the financial visibility needed to make strong decisions. Reporting was limited, bookkeeping had only been completed annually for tax filing purposes, and there was little insight into profitability, spending trends, owner compensation, or cash flow. QuickBooks Online was not integrated with the point-of-sale system, and overhead had never been properly reviewed.

What Needed to Change

The business did not just need cleaner records. It needed more reliable financial visibility so the owner could understand costs, evaluate overhead, make more informed operating decisions, and plan for growth with greater confidence.

Our Advisory Approach

We introduced consistent monthly reporting, redesigned the profit and loss statement for better insight, implemented Profit First to support healthier cash flow management, and integrated point-of-sale data for more accurate monthly sales reporting. Through ongoing support in our Numbers Mastery program, the owner gained clearer insight into operating expenses and profitability, along with guidance that helped him make more deliberate decisions about staffing, cost control, and business planning. Supporting systems also included payroll through Payworks and Dext for document management.

Why This Mattered

Once the owner had more reliable numbers, he could move from reacting to problems to making more intentional decisions. Better visibility into costs and profitability supported changes to the team structure, helped absorb a substantial rent increase without compromising profitability, and strengthened the business ahead of its ownership transition.

Results at a Glance

- Improved visibility into operating costs, profitability, and owner compensation
- Administrative support added to handle day-to-day operations
- Janitorial support added to free up personal time
- Staff benefits introduced to retain high-quality coaches
- Substantial rent increase managed without compromising profitability
- Gross profit and overall earnings improved
- Clean books, detailed reporting, and clear financial history supported the sale of the business in 2024

Client Feedback

“Working with Jodi gave me a better understanding of the operating expenses in my business. I was able to prioritize areas that would strengthen my business plan and profitability. Jodi also helped me audit expenses and trim unnecessary costs to build a more sustainable business.”

Call to Action

If you are making decisions without current financial visibility, you are carrying avoidable risk. We help business owners turn financial reporting into better decisions, stronger profitability, and more sustainable growth.

ARE YOU READY FOR FRACTIONAL CFO SUPPORT?

Take the first step to sustainable profitability.

Learn more at inarafinancial.ca or
call us today on 250.938.5634.

Looking for bookkeeping support?

Our preferred partner, [North Okanagan Bookkeeping](#),
provides reliable bookkeeping services that keep your
records accurate, organized, and up to date.



CONTACT US

INARA FINANCIAL

If you're ready to gain clarity around your finances and build a more profitable business, we'd love to connect!

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