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I N A R A

FINANCIAL CORPORATION

CASE STUDY



HOW A GROWING CLINIC STRENGTHENED FINANCIAL CONTROL AND RETURNED TO PROFITABLE GROWTH

Client	Multidisciplinary Health & Wellness Clinic
Location	Okanagan, BC
Team	25+ clinicians and support staff

The Situation

After several years of rapid growth, this clinic had strong sales and an expanding client base, but its financial systems had not kept pace. Reports were missing or unreliable, accounts were not being reconciled consistently, and there was limited visibility into profitability. The owners were trying to make decisions while dealing with rising expenses, weak reporting, and growing uncertainty around the true financial picture.

What Needed to Change

This was a growth-stage financial control issue. The clinic needed more dependable reporting, stronger underlying processes, and clearer visibility into margins and expenses so the owners could make informed decisions and manage growth more profitably.

Our Advisory Approach

We helped rebuild the clinic's financial foundation through a full system overhaul and historical cleanup, along with monthly financial reporting and review sessions through our Numbers Mastery program. We also provided guidance on expense control, profit margins, and growth planning so the owners could use their financial information more strategically. Supporting systems included payroll through Payworks and integration of Dext and Jane for invoicing, vendor management, and reporting support.

Why This Mattered

Before this work, the owners were dealing with limited visibility into why revenue growth was not translating into stronger profits. Once reporting became timely, accurate, and usable, they were in a better position to understand costs, tighten controls, and make more intentional decisions about growth.

Results at a Glance

- Revenue grew steadily year over year
- Gross profit margins improved
- Expense controls took effect
- The business moved from a small operating loss to consistent profitability
- Financial reporting became timely, accurate, and actionable
- Ownership gained stronger visibility for planning and decision-making

Client Feedback

“Working with Jodi has given us a sense of control and peace of mind. Our reports are current, accurate, and easy to understand. Her input has allowed us to plan and think more strategically about growth.”

Call to Action

Growth creates complexity. Without stronger reporting and financial control, that complexity can erode profitability. We help business owners build the visibility, structure, and decision support needed to grow more confidently.

ARE YOU READY FOR FRACTIONAL CFO SUPPORT?

Take the first step to sustainable profitability.

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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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