



PERFORMANCE INSIGHT FOR METRIC-DRIVEN OWNERS

Financial Analysis Services

Profit and Loss analysis, financial ratios, KPI monitoring and more - so you know what's driving performance.

A GUIDE FOR OWNERS WHO WANT TO KNOW WHAT'S REALLY DRIVING THE RESULT

WHO WE WORK WITH

You're performance-driven. Your reporting should be too.

You already track the headline numbers. Revenue is growing, the business is profitable, and yet you can't always answer the harder question: what's actually driving the result, and what's quietly holding it back? If you're competitive, metric-focused, and expect the same discipline from your numbers as the rest of the business, generic reporting won't cut it.

THE PROFILE, AT A GLANCE

\$4M–\$20M+

ANNUAL REVENUE

≥20%

NET PROFIT MARGIN

Performance-driven

PSYCHOGRAPHIC

Metric-focused

DECISION STYLE

Action-biased

MOVES FAST; EXPECTS THE SAME

Strong revenue can still hide a weak result

Three categories of blind spot we see consistently in growing businesses.



Diagnosis

- Profit leakage despite strong revenue
- No clear view of which parts of the business drive margin
- Financial reporting that's too high-level to act upon



Strategic Clarity

- Difficulty translating vision and targets into measurable performance
- Plateauing growth with no clear diagnosis of why
- Limited access to genuinely commercial advice



Accountability

- No structured KPI framework the team is held to
- Systems and reporting not keeping pace with scale
- Owner over-reliance because no one else reads the numbers the same way

Analysis that tells you where to focus next



Profit & Loss Analysis

Line-by-line analysis of what's actually driving - or diminishing - your margin.



Financial Ratio Analysis

Benchmarked ratios that show how the business is really performing, not just whether revenue is up.



KPI Design & Monitoring

A KPI framework built around your business, tracked on a structured cadence, reviewed with you regularly.



Performance Reviews

Regular, structured sessions that turn analysis into decisions - pricing, cost, headcount and investment.

HOW WE WORK

Direct, commercial, built for people who move fast

- We lead with commercial outcomes, not technical jargon
- Analysis delivered on a fixed-fee, structured touchpoint basis
- Direct communication - we tell you what the numbers mean
- We challenge constructively, and expect you to push back



“You can't improve what you can't see clearly.”

WHAT CLIENTS TELL US THEY WANT

- ✓ Clear financial visibility and forward planning
- ✓ A trusted commercial sounding board
- ✓ Proactive advisory - not reactive compliance
- ✓ Support to translate performance data into real decisions

Is this the right fit for your business?



This is likely a strong fit

- \$4M+ revenue with $\geq 20\%$ net profit margin
- Performance-driven and comfortable with structured accountability
- Wants to understand what's really driving results
- Ready to act on the analysis, not just receive it



Probably not the right fit

- Revenue under \$2M or low-margin operations
- Wants a one-off report with no ongoing review rhythm
- Not yet ready to act on what the numbers reveal



LET'S START THE CONVERSATION

You can't improve what you can't see clearly.

If your reporting tells you what happened but not why, we'd welcome the chance to show you a sharper way to look at your numbers.

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