



**Infibooks India**  
Consultancy Company

# Case Study

## TRAVEL



Visit Our Website  
[www.infibooks.com](http://www.infibooks.com)





# About us

InfiBooks is not just a bookkeeping service; we're your full-service financially, guiding you through every fiscal twist and turn.

We don't just crunch numbers; we empower decision-making, offering insightful support to tackle even the toughest financial dilemmas.

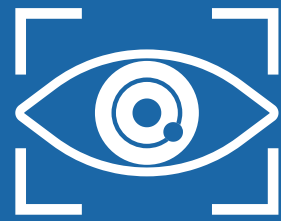
Our mission is to make your financial journey smoother, with cost-effective solutions tailored to your needs.

## CEO Profile

As a Chartered Accountant with certifications in Forensic Auditing, Concurrent Auditing, and Public Finance and Government Accounting, Rishi boasts over fifteen years of experience in providing comprehensive CFO services and end-to-end financial solutions. Prior to joining Infibooks, Rishi honed his skills at esteemed organizations such as ISWP (TATA Group) and TCPL (Cummins), solidifying his reputation as a trusted professional in the field.

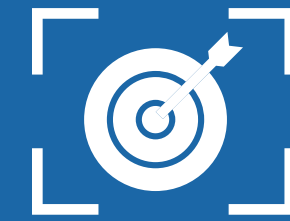


# Vision & Mission



## Company Vision

Our vision is to be the leading consultancy and bookkeeping firm recognized for transforming business potential into performance. We aspire to set the standard for excellence in financial management by continuously innovating our services, leveraging cutting-edge technology, and fostering a culture of learning and growth. Our ultimate goal is to contribute to the success and prosperity of businesses worldwide, ensuring they thrive in an ever-evolving financial landscape.



## Company Mission

our mission is to empower businesses by providing comprehensive consultancy and meticulous bookkeeping services. We strive to enhance financial clarity, optimize operational efficiency, and drive sustainable growth for our clients. Through our expertise, integrity, and commitment to personalized service, we aim to be the trusted partner that businesses rely on to navigate their financial journey with confidence and success.

# Client Profile

- Our Client's Journey begins with a passion for Providing a life time experience.
- Today's travelers are looking for unique and personalized experiences. If a travel company can offer customized travel itineraries based on individual preferences, interests, and budget.
- Offering competitive pricing and deals can help a travel company stand out. This can include discounts for group bookings, loyalty programs, or seasonal promotions.
- Ensure that a significant portion of the business revenue benefits local economies by sourcing locally and hiring local staff.
- Community Engagement: Collaborate with local communities to develop and promote cultural heritage, traditional crafts, and local attractions.



# Client Journey

## Connect



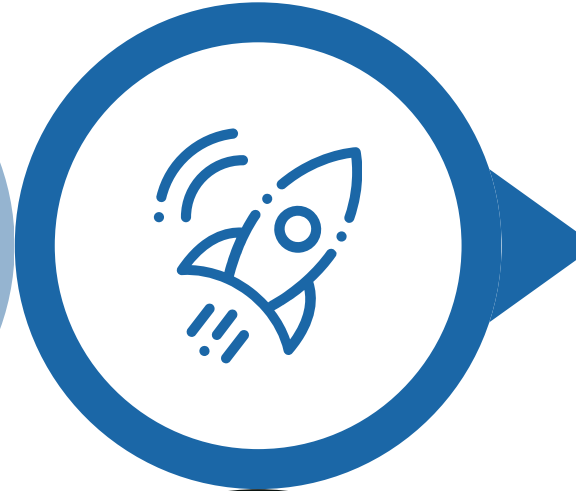
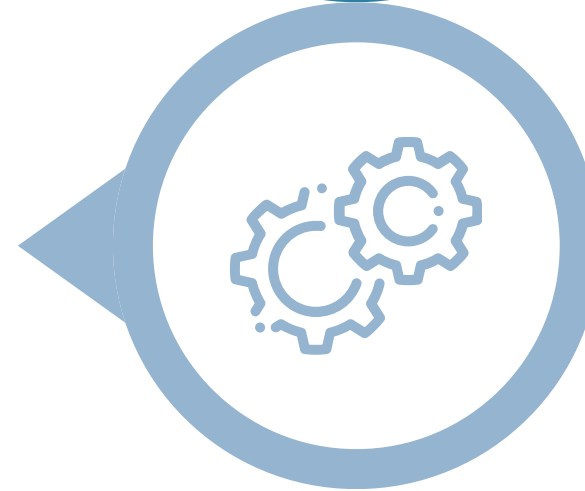
### Client Onboarding

- Contract Finalization
- Information via Onboarding form
- Finalisation of Scope of work
- Signing NDA
- Mode of Communication
- Reporting requirements

## 02

### Due diligence

- Business Overview,
- Understanding Revenue Metrics, Market trends, Cost metrics
- Scenario Analysis
- KYC (Know your Client ) to understand social and economical objectives, strategies and vision.



### Embarked On

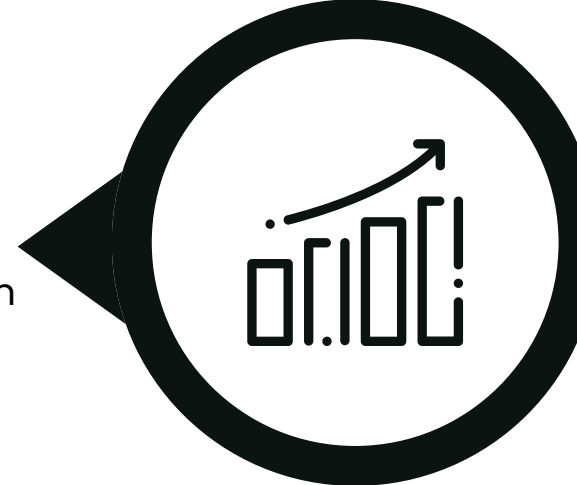
## 03

- Creating Budgeted Expenses and Actual expenses sheet
- Receivables Management
- Reading/ Thinking/Watching Trends
- Affiliate Commission Record, Familiarisation Trips Record sheet
- Creating Bundle Optimization

## 04

### Reporting

- Financial Modelling
- Record of EMIs and Credits pending
- Income Statement Trip wise and Month wise
- Variance Analysis
- Currency Conversions
- Automated system for Recording customised requirements



### Goals

# Challenges Faced



## Lack of Established Systems

The client had no existing systems or templates to efficiently track and document business expenses and financial transactions. This lack of structure made it difficult to maintain accurate financial records.



## Inefficient Financial Tracking

Without a structured approach, tracking and managing financial data was time-consuming and prone to errors. The manual processes increased the risk of inaccuracies and inconsistencies.



## Difficulty in Expense Management

The absence of a streamlined process made it challenging to monitor and categorize expenses accurately. This led to potential oversights and difficulties in financial reporting.



## Limited Expertise

The client lacked the specialized knowledge required to set up a robust financial tracking system that would be easy to use and maintain. This gap hindered their ability to implement effective financial controls.

CONTINUE

# Our Unfoldings



## Need for Custom Solutions

The client required a tailored solution that could fit their specific business needs, whether through Excel or another suitable platform. Off-the-shelf solutions were insufficient to address their unique requirements.



## Scalability Concerns

Any solution implemented needed to be scalable to accommodate future business growth and increasing financial complexity. The client needed a system that could evolve with their business.



## Time Constraints

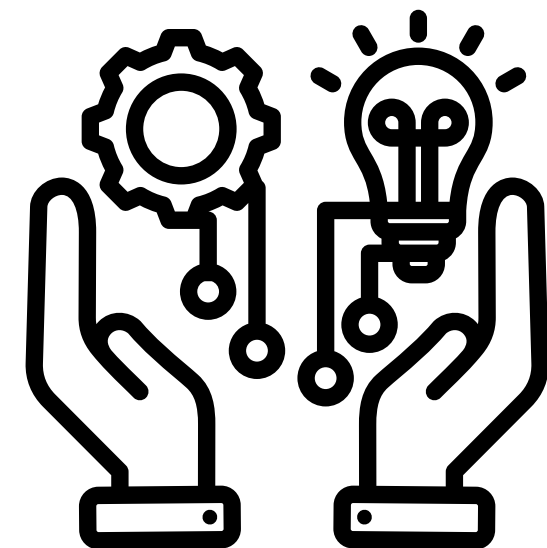
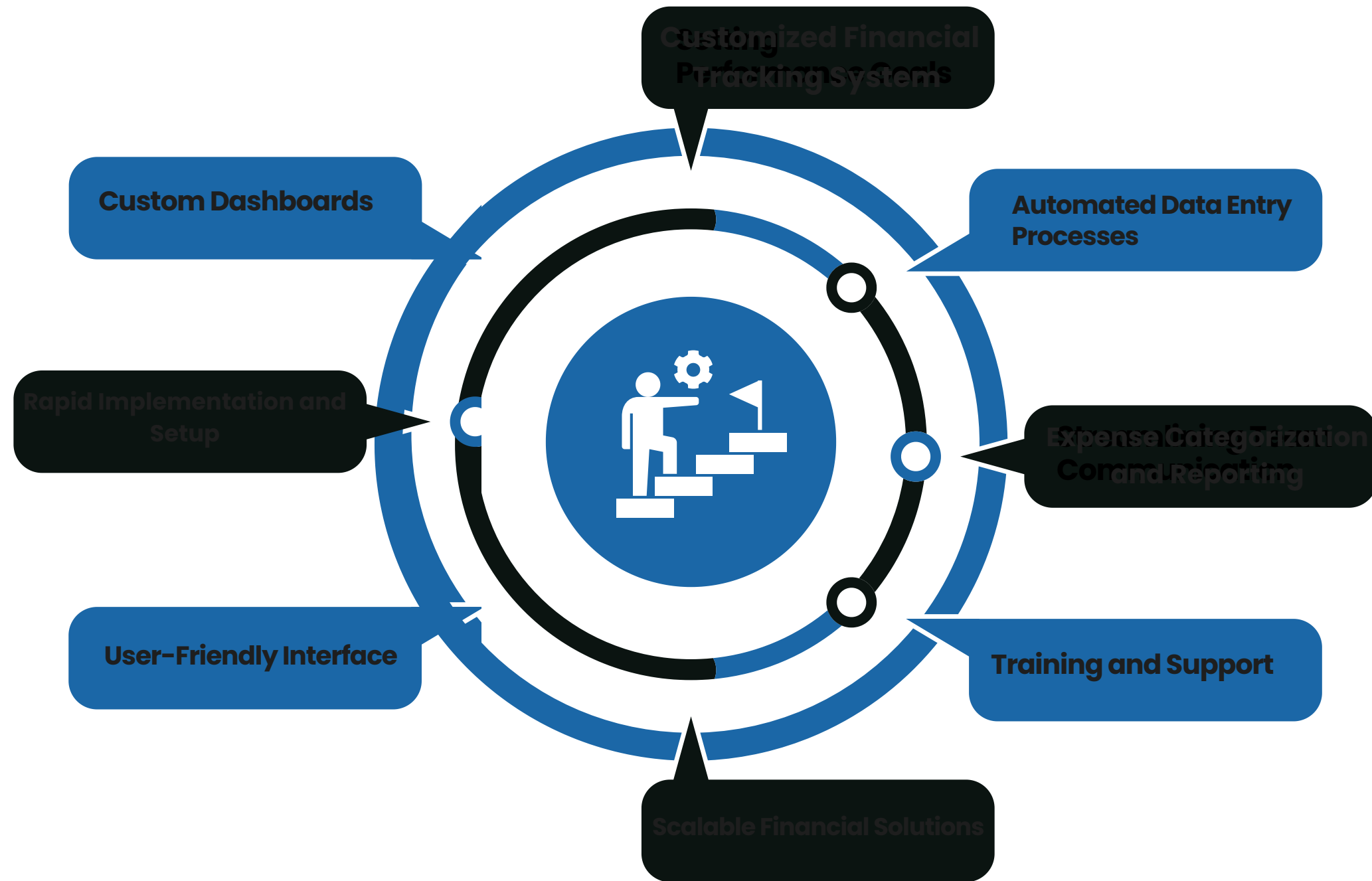
The client needed a quick and effective implementation to start managing finances accurately without significant delays. Delayed financial organization could negatively impact business operations.



## User-Friendly Interface Requirement

The client needed a financial tracking system that was intuitive and easy to use for all team members. This requirement was critical to ensure smooth adoption and consistent usage across the company.

# Our Solutions





# Results Achieved



## Enhanced Reporting and Visualization

Interactive dashboards and visual reports can help stakeholders quickly understand key financial metrics and make strategic decisions.



## Streamlined Financial Tracking

A customized system efficiently documented and monitored all financial transactions, reducing management time and effort.



## Improved Expense Management

Accurate categorization and tracking of expenses enhanced visibility and control over spending, leading to better budget allocation and cost-saving.



## Increased Accuracy and Compliance

Automated data entry minimized errors and ensured compliance with financial regulations, improving record accuracy



## User-Friendly and Scalable Solution

An intuitive, easy-to-use system ensured smooth adoption and scalability for future growth without major overhauls.

# Ongoing Involvement

Partners in growth journey



# Conclusion



Our consultancy firm played a pivotal role in implementing the customized financial model for the travel company addressed critical challenges, transforming their financial management processes. The streamlined financial tracking, improved expense management, enhanced reporting capabilities, increased accuracy, and scalable, user-friendly solution significantly boosted operational efficiency. These improvements not only provided the company with a solid foundation for current financial oversight but also positioned them for sustained growth and future success. The tailored approach demonstrated the value of specialized financial systems in overcoming industry-specific challenges and driving business excellence.

# Our services

## Financial Strategy and Leadership

**Virtual CFO & Fractional CFO Services** - Access top-tier financial expertise affordably with our virtual and fractional CFO services..  
**Financial Modeling** - Make confident, data-driven decisions with our advanced financial modeling services.



## Financial Operations Management

**Accounting & Bookkeeping** - Free yourself from tedious tasks and focus on business growth.  
**SOP Implementation** - Establish efficient and standardized operating procedures (SOPs) to streamline your business operations and maximize productivity.



## Talent Management and Support

Access top talent on a flexible basis with our contract staffing services. Whether you need temporary support for a specific project or ongoing assistance to fill critical roles, we'll connect you with skilled professionals



# Meet Our Team



**Anmol Agarwal**

Operational Manager

Anmol leverages over 5 years of experience to optimize operational efficiency and drive strategic initiatives. Her expertise lies in enhancing market reach and nurturing client relationships through innovative solutions and dedicated service.



**Meenakshi Dewan**

Chief Consultant

Meenakshi brings a unique blend of financial expertise and strategic marketing acumen. With 16 years of experience in the accounting industry, specialize in driving growth, expanding market presence, and building strong client relationships.



**Alka Gaharwar**

Business Specialist

Alka has honed her expertise in financial analysis, credit analysis, bookkeeping, auditing and assurance, and taxation advisory services. With comprehensive experience in these areas, Alka provides precise financial insights and robust strategic guidance.

# Contact Us

At Infibooks, we understand that running a business is more than just crunching numbers; it's about making strategic decisions that drive growth and success. That's why we offer a comprehensive range of services designed to meet your financial needs and empower your business to thrive.



+91-8084-854-671



[www.infibooks.com](http://www.infibooks.com)



[rishi@infibooks.com](mailto:rishi@infibooks.com)



Jamshedpur - 831013, JH, India





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