



**Infibooks India**  
Consultancy Company

# Case Study Healthcare & Wellness



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.

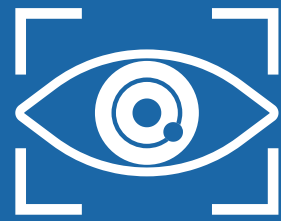
Our mission is to make your financial journey smoother, with cost-effective solutions tailored to your needs.

## 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.

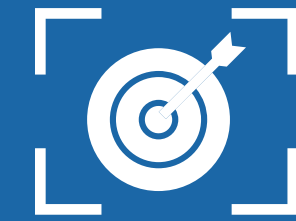


# Vision & Mission



## 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

- Franchise of Liquivida (MedSPA, Fillers, Botox & Medical aesthetics )
- Motto: Optimal health and wellness is what keeps you living life to the fullest
- Franchise is operated by a respected network of medical professionals who believe that sustainable health and wellness can be achieved by knowing the body and caring for it through targeted nutrition and a combination of preventative and functional medicine solutions
- It caters to every lifestyle and makes proactive health and wellness affordable - especially as one ages.
- One-stop-shop for all of health, wellness, and anti-aging needs



# Client Journey

**Connect**



## Client Onboarding

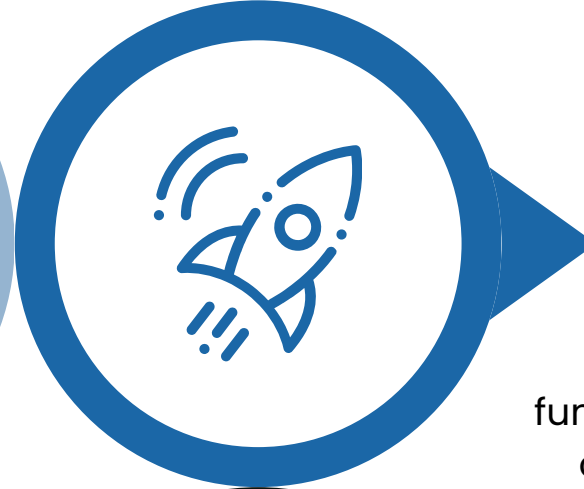
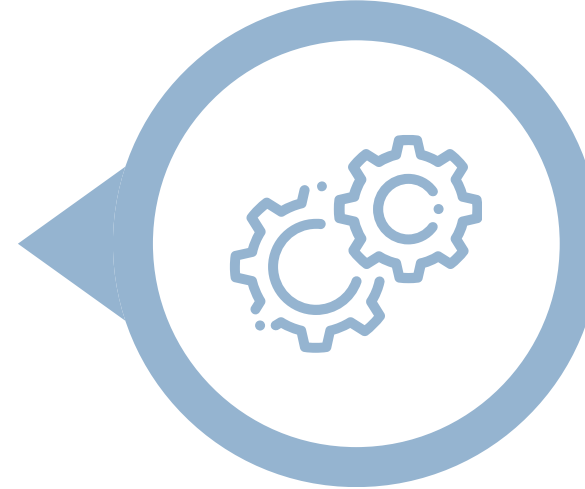
**01**

Contract Finalization, Information via Onboarding form, Business Portfolio, Timelines alignment, Mode of Communication, Reporting requirements

**02**

## Due diligence

Business Overview, Observation/Analysis of Books/Financial Information, Basic document collection, Validate various accesses



## Daily processes

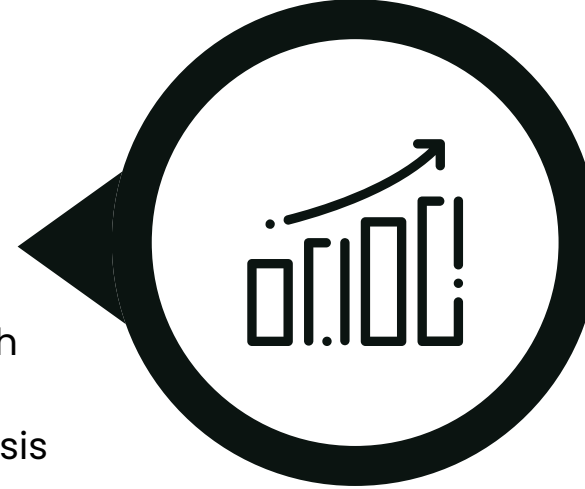
**03**

Transactions in Quick books/Wave/Xero/Zoho, Reconciliations/MIS, Tracking of Invoices from Email/Vendor Portal, Categorization of transactions/ Oversight financials for smooth functioning, Monitoring Cash Flow, Keeping check on Account receivables and payables and their due dates

**04**

## Reporting

Preparation of PL Account, Adjustment of Receivables/Payables/ Inventories, Checking on Accrued transactions, Reconciliation of amount received through apps, credit card, Bank reconciliation of accounts linked with software used, Analysis of Cash flow, Reporting on business metrics and KRA



**Goals**

# Challenges Faced



## Diverse Revenue Streams

Wellness organizations often have multiple sources of revenue, such as Product sales, Service sales, Package sales, Memberships etc. Tracking and managing these diverse revenue streams can be complex and time-consuming.



## Regulatory Compliance

Wellness organizations must comply with various local, state, and federal regulations, including tax laws, health regulations, and financial reporting standards. Keeping up-to-date with these regulations and ensuring compliance can be challenging.



## Managing Payroll and Benefits

Many wellness organizations employ a mix of full-time, part-time, and contract staff. Accurately managing payroll, benefits, and taxes for these different types of employees requires robust systems and careful attention to detail.



## Inventory Management

For those that sell products such as supplements, health foods, or wellness gadgets, managing inventory accurately is critical. This includes tracking stock levels, costs, and sales, which can be complicated without proper systems in place.

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# Challenges Faced



## Cash Flow Management

Maintaining healthy cash flow is vital for any business. Wellness organizations may face challenges in timing their revenue and expenses, particularly if they have seasonal variations in business activity.



## Client Receivable & Vendor Management

Managing accounts receivable for membership fees or services rendered on credit can be difficult. Wellness organizations need effective systems to track payments, follow up on overdue accounts, and manage cancellations or changes in membership.



## Expense Tracking

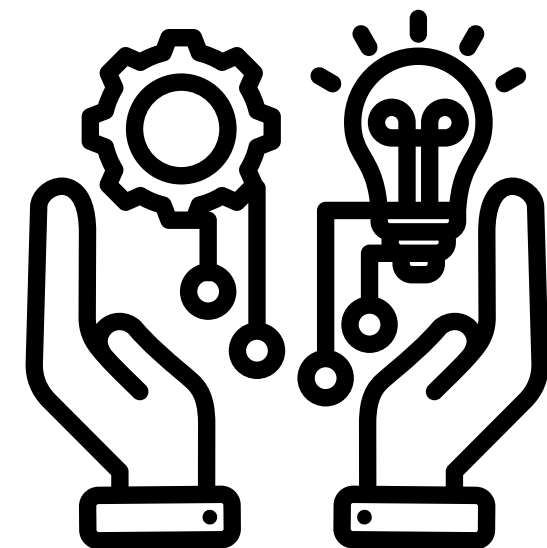
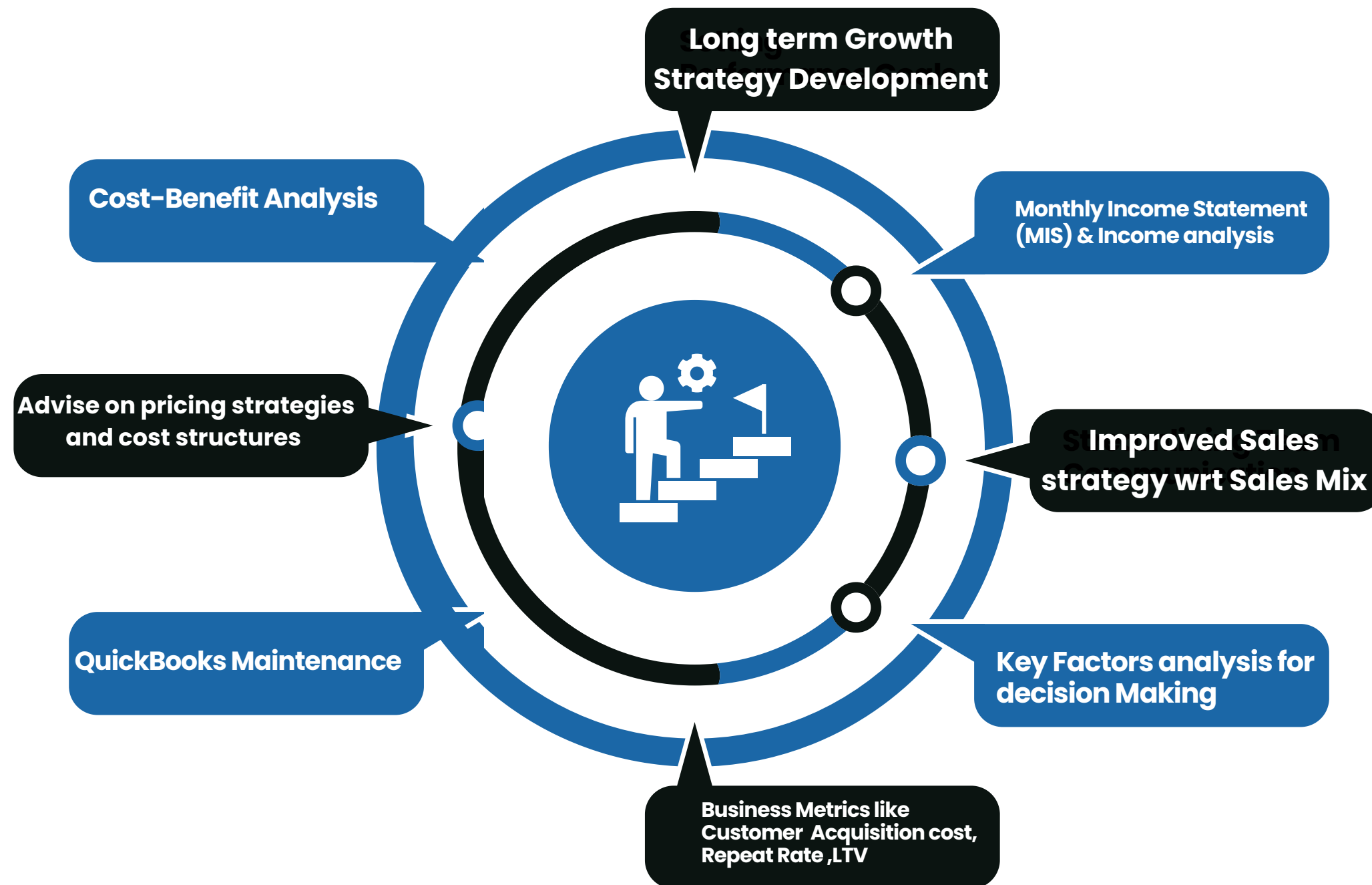
Wellness organizations often have a variety of expenses, from rent and utilities to equipment purchases and marketing costs. Keeping accurate records and categorizing these expenses correctly is essential for financial reporting and tax purposes.



## Financial Reporting and Analysis

Generating accurate financial reports and performing financial analysis can be challenging without the right tools and expertise. These reports are crucial for decision-making, securing financing, and meeting regulatory requirements.

# Our Solutions





# Results Achieved



## Enhanced Organizational Efficiency

By implementing structured accounting processes and systems, the client achieved greater organization and clarity in their financial affairs.



## Improved Strategy planning

Benefit thorough financial analysis to understand performance metrics and business trends.



## Enhanced Financial Oversight

With comprehensive MIS reports and PL analysis, the client gained deeper insights into their financial performance, enabling informed decision-making.



## Streamlined Operational Processes

Our oversight of operational processes ensured alignment with accounting standards, fostering efficiency and accuracy across the board



## Time Savings for Business Owners

Focus on core business and stress reduction with better managed finances

# Ongoing Involvement

Partners in growth journey



# Conclusion



Our consultancy firm played a pivotal role in empowering our client to overcome their accounting challenges and achieve greater financial control and transparency. By providing tailored solutions and strategic guidance, we enabled our client to unlock new opportunities for growth and success in the competitive Wellness industry. We remain committed to supporting our clients in achieving their business objectives and look forward to continued collaboration and success.

# 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.

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