



# CLIENT SUCCESS CASE STUDY

Adam and Lisa Rice from Total 2 Pack were deeply immersed in their business, still on the tools and working long hours, but not seeing that translate into profitable growth. They were in the weeds of the day-to-day operations and wanted to take more control over the direction of their business, improve their profits, and gain a healthier work-life balance.

## Working with Trinity Advisory

Adam and Lisa meet with their Trinity Senior Advisor on a quarterly basis. During these meetings, their Advisor reviews their business analysis reports in detail, offering valuable insights into the underlying drivers of their business. As part of our Coaching services, we collaborated with Adam and Lisa to establish their core values, mission, and vision, subsequently assisted them in crafting a strategic plan aligned with their 3-year business vision. These pivotal elements are reviewed each quarter, in line with the business' financial data, providing opportunity for discussion and guidance on the action steps required to achieve their objectives. Through these quarterly sessions, Adam and Lisa have fortified their communication as business partners, fostering alignment on future priorities and enabling them to make astute, unified decisions.

## Year-on-Year Profitable Growth

Adam and Lisa have gained the confidence to make significant changes to grow their business in the direction they wanted. After working with Trinity Advisory for 2 years, they've been able to purchase their premises that they were previously renting. They've upgraded their machinery and implemented a number of operational changes to improve efficiencies. They've become much clearer on their customer niche, which has helped them to target the right customers for profitable growth, not just increased revenue. Over the last 2 years, they have seen a 35% Compounding Annual Growth Rate in their profits. Most importantly, they have significantly improved their lifestyle and fallen back in love with their business.



*Prior to Trinity, I was fully involved in the business, on the tools every day till midnight. I wasn't really thinking about anything outside that realm. Trinity Advisory opens up your mind to understand that there are more things to life.*

*What stood out for me to switch to Trinity Advisory was the whole package. It was all the extra support, all the advice, all the reports that they have done for the accounting side of things, which helped me understand my job a lot better. That's what we weren't getting from our previous accountants.*

*They push you where you need to be pushed, in a direction allowing you to focus on yourself more as well. In turn, that has helped us as a couple working together in a business. It's allowed us to communicate about the business more.*

*So far, what I've enjoyed about the business coaching would be the fun element they've brought to learning about our business. They've made it very interesting. I'm able to ask any question. I don't feel silly when I'm asking any questions.*

*I would recommend Trinity Advisory to anyone who has a business or is sole trader, and I would let them know about the amazing support that they've offered, that they've brought to us and our business, the confidence that we now have to be able to keep moving forward and keep growing our business. They're a great team.*

Adam and Lisa Rice,  
Owners of Total 2 Pack

