



Where data, finance, and marketing converge.

Consulting Portfolio

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Case Study I. Highland Yoga - Comprehensive Data Analytics & Strategy

“Bree’s work has had a huge impact on our growth and marketing strategies and is integral to our plans moving forward.”

-Elspeth Brotherton, Founder and CEO of Highland Yoga

Client Overview

Highland Yoga, a thriving regional yoga brand with ten studios across Atlanta and Nashville, sought strategic business insights and detailed financial analytics to better understand revenue streams, client behaviors, and growth opportunities.

Project Objectives

- Conduct detailed financial analyses of multiple revenue streams, including studio memberships, intro offers, teacher trainings, workshops, retreats, and online subscriptions.
- Build financial models of individual studios, and model planned expansion for potential investors.
- Calculate and evaluate key business KPIs, such as Lifetime Customer Value (LCV), churn rate, and retention rates.
- Evaluate effectiveness and profitability of marketing and customer acquisition channels, including Intro Offers, Groupon, ClassPass, referrals, and social media.
- Identify high-impact strategic initiatives focused on operational efficiency, profitable customer acquisition, and long-term retention.
- Build financial models of individual studios, and model planned expansion for potential investors.
- Optimize SEO.
- Automate data analytics for digital offerings.

Methodology & Strategic Analysis

I applied a multi-dimensional analytical approach using data-driven tools and techniques:

1. KPIs & Financial Analytics

- Integrated financial data from QuickBooks and client data from MindBody to create nuanced KPI analytics for:
 - Customer metrics like LCV (integrating network effects)

- Predictive financial models
- Unit economics

2. Client Acquisition & Retention Analysis

- Analyzed effectiveness and profitability of client acquisition channels:
 - Intro Offers had approximately ███% **long-term retention**, generating robust recurring revenue streams.
 - Groupon promotions outperformed expectations, delivering a remarkable ███% **retention rate**.
 - Physical flyers demonstrated cost-effective and profitable client acquisition, outperforming digital ads in direct conversions.

3. Revenue Diversification & Profitability Insights

- Quantified significant contributions from supplementary offerings, including teacher training, merchandise sales, yoga retreats, and online yoga memberships.

4. SEO Optimization

- Added structured data to Highland Yoga website and Highland Flow website (online yoga) to improve SEO and generate Google snippets.
- Added alt text to all images and optimized keywords for search.

5. Strategic Recommendations for Growth & Efficiency

- Prioritized and optimized marketing channels that showed significant retention performance.
- Recommended renewed focus and expansion of client referral programs, demonstrating a high-margin return of \$████ **per referred client**.
- Recommended an increase in digital marketing and reallocation of marketing budgets toward proven high-return acquisition strategies, significantly reducing customer acquisition costs.

6. Automate data analytics for digital platform

- Integrated financial data from Stripe with client data from Namastream to create a fully automated, real-time KPI dashboard.
- Integrated API-driven data directly into customized Google Sheets for live updates on performance metrics, minimizing manual effort and enhancing data accuracy.

Key Outcomes & Impact

- Delivered clear, actionable analytics empowering Highland Yoga to confidently pursue strategic geographic and digital expansion initiatives.
 - Enhanced visibility into customer acquisition profitability, directly influencing marketing spend efficiency and resource allocation.
 - Provided quantified strategic recommendations, positioning Highland Yoga to achieve a target valuation of approximately \$██████ million by 2026.
 - Enabled the leadership team to communicate compelling financial narratives to potential investors.
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Deliverables

- Comprehensive statistical analysis reports quantifying client behaviors, revenue trends, and KPI benchmarks.
 - Integrated financial models accurately projecting revenue growth and profitability.
 - Strategic presentation decks tailored explicitly for investor presentations, including visual summaries of client acquisition profitability, churn analysis, and detailed revenue stream breakdowns.
 - Automated data analytics for digital offerings.
 - SEO optimized with structured data, optimized keywords, and alt text.
-

Tools & Technologies Utilized

- Google Sheets and Excel for advanced analytics and financial modeling
 - Python for analyses of revenue, attendance, and clients based on Mindbody data
 - Mindbody and Namastream for subscriber data
 - QuickBooks and Stripe for financial data
 - Statistical and strategic analysis methodologies, including cohort retention modeling and profitability analysis
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Client Impact & Results

The comprehensive analysis and strategic recommendations provided clear pathways for Highland Yoga to efficiently enhance profitability, sustainably grow their client base, and successfully communicate strategic vision and financial health to potential investors.

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Fig. 1 Financial Analyses

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Fig. 2 Financial KPIs

KPIs	2021	2022	2023	2024	Averages
EBITDA%	30%	44%	36%	28%	36%
Net Income %	29%	50%	28%	19%	31%
YoY Revenue Growth	10%	35%	44%	24%	49%
Compound Annual Growth Rate (CAGR)	44%	43%	43%	41%	76%
	31-Dec-21	31-Dec-22	31-Dec-23	31-Dec-24	26-Feb-25
Current Ratio	2.27	3.31	1.74	1.60	1.88
Return on Assets (ROA)	0.68	1.16	0.87	0.58	0.84
Return on equity (ROE)	1.01	1.60	1.14	0.81	1.16

Fig. 3 Model of Growth for a New Highland Yoga Studio



*Model represents inflation-adjusted numbers averaged across the three legacy studios for which there was sufficient data.

Fig. 4 Forecast Model for All Studios Including Proposed Additions

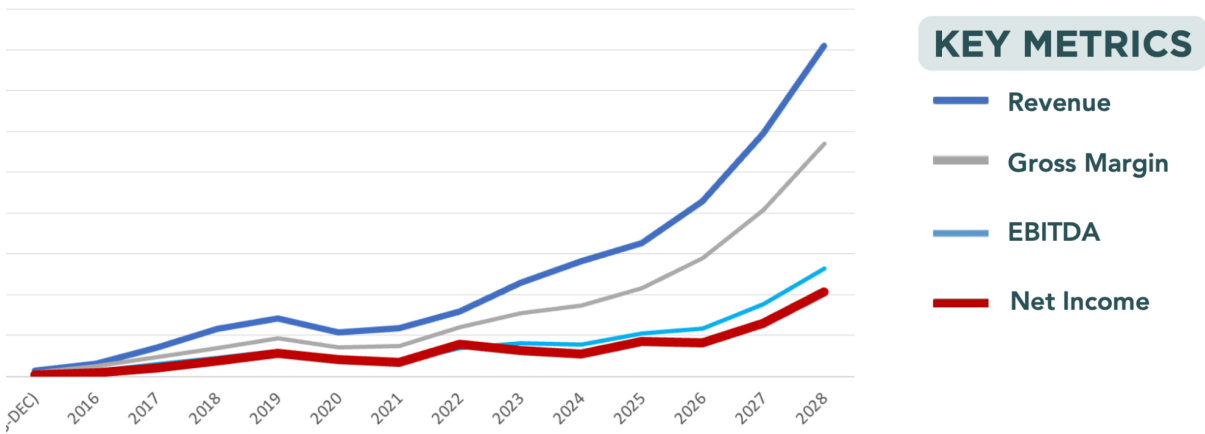
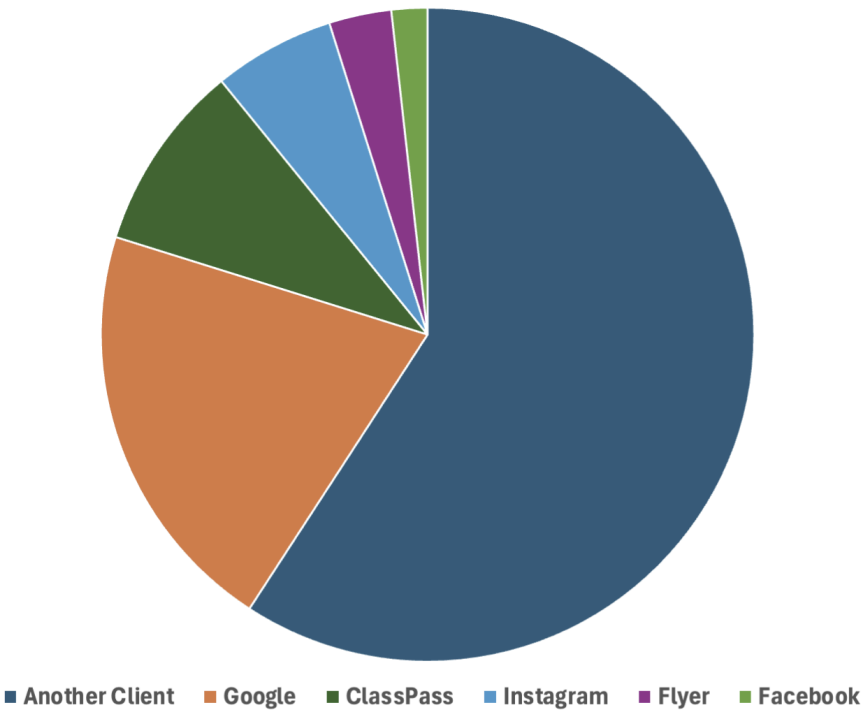


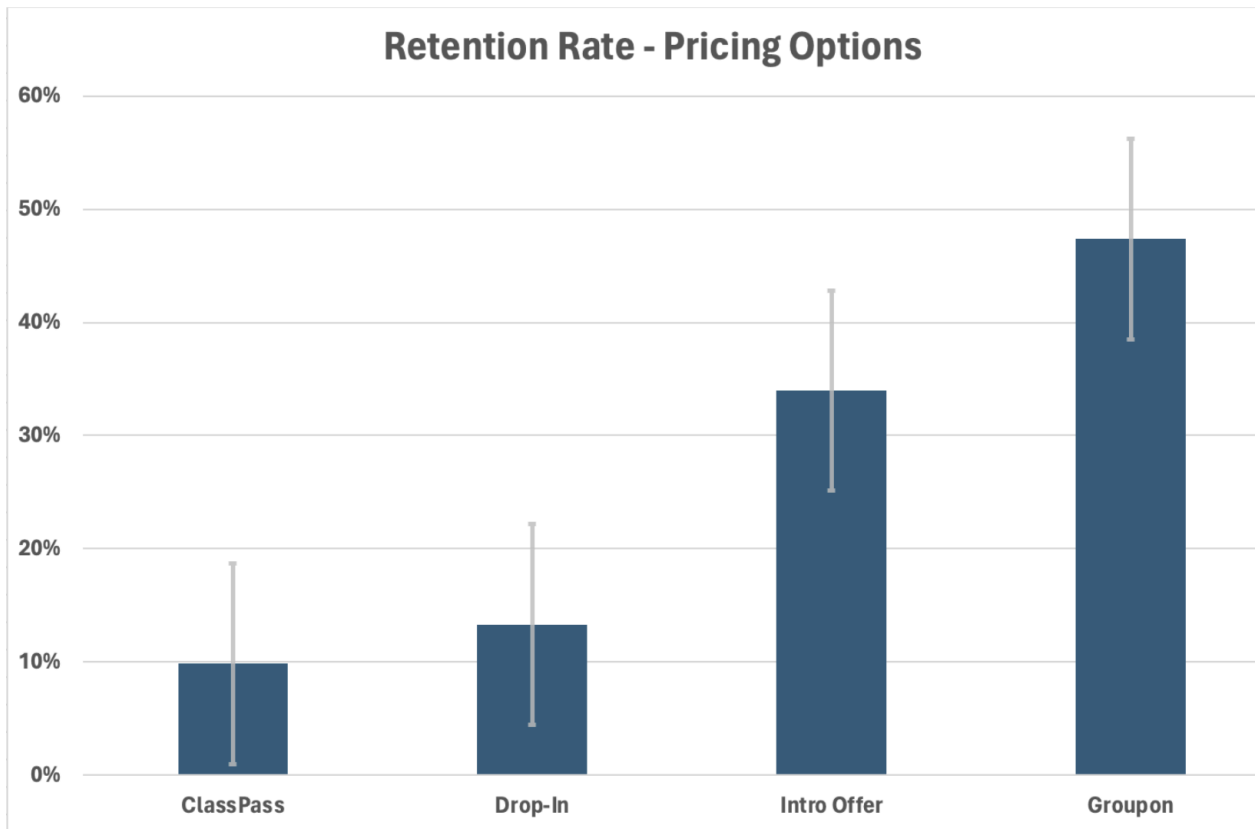
Fig. 5 Proportion of students referred from each source in 2024 who will go on to purchase a membership or package.

Clients Retained from Common Referral Sources - 2024



*These proportions closely approximate the total value Highland Yoga receives from each of these sources. Client referrals generate nearly ███% of all profits at HY.

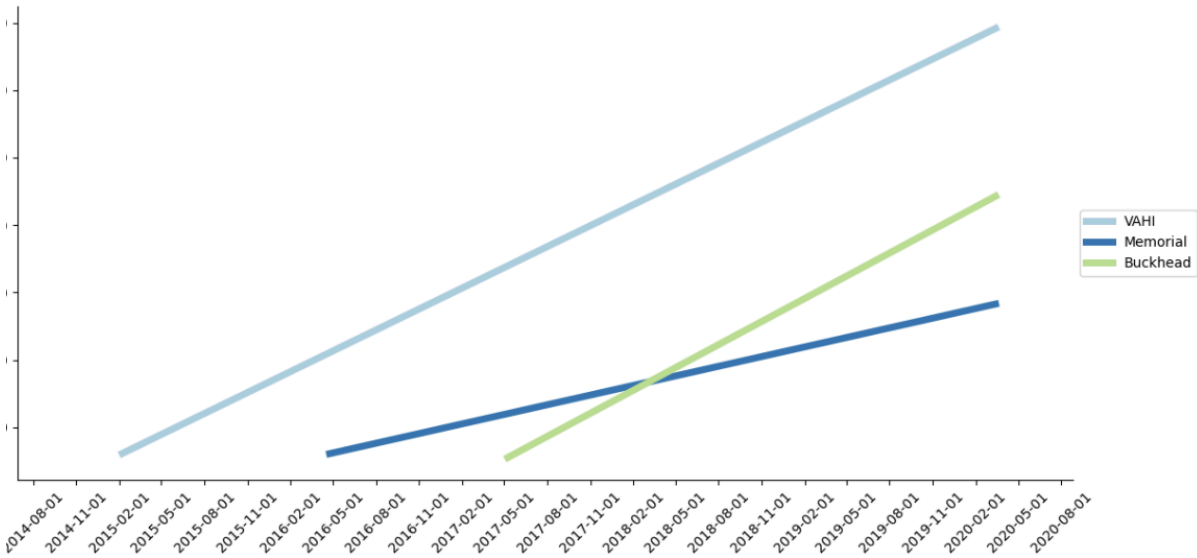
Fig. 6 Retention rates for common pricing options (all time).



*"Retention" means the student goes on to purchase a membership or package.

Fig. 7 Revenue by studio, before and after COVID.

Adjusted Revenue per Day by Studio — Before COVID



Adjusted Revenue per Day by Studio — After COVID

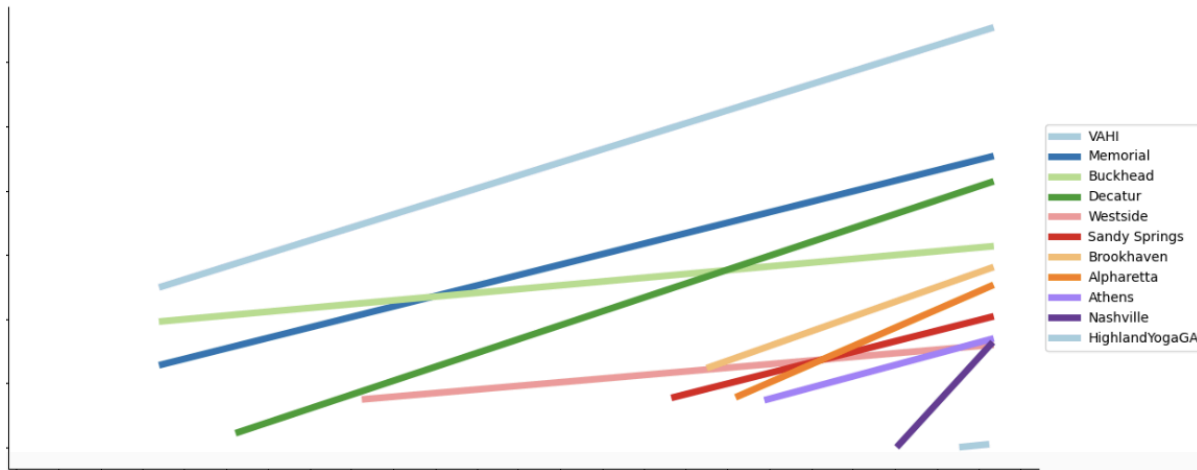


Fig. 8 28-Day Moving Average of Revenue (All Time)

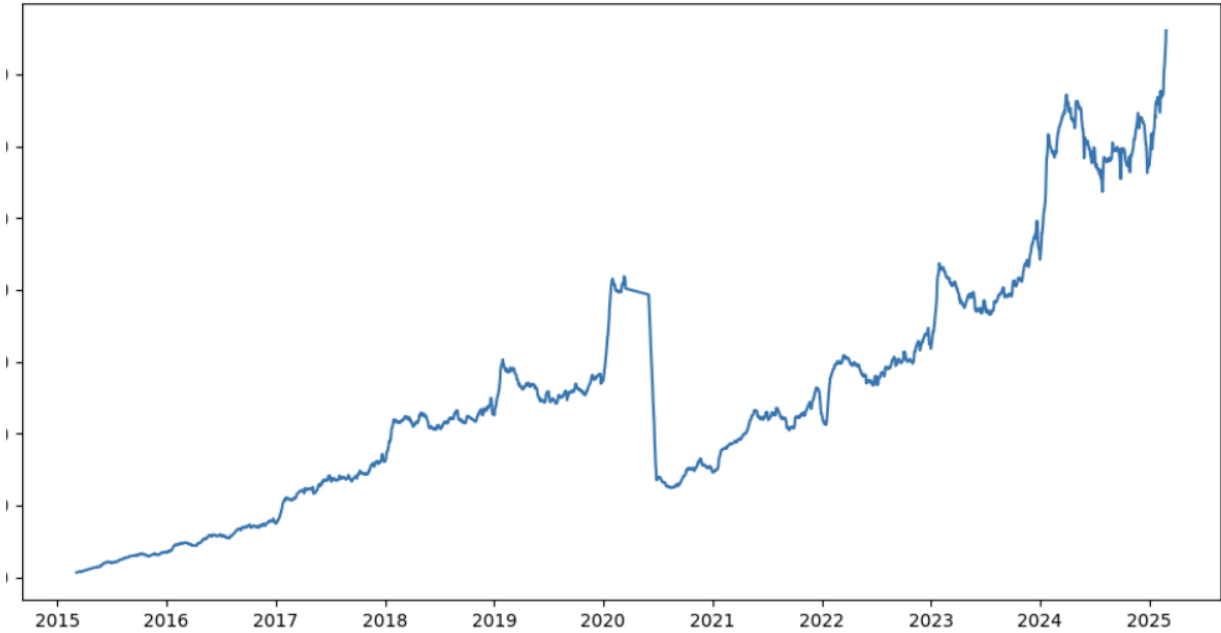


Fig. 9 Autoregressive Predictive Model for Revenue

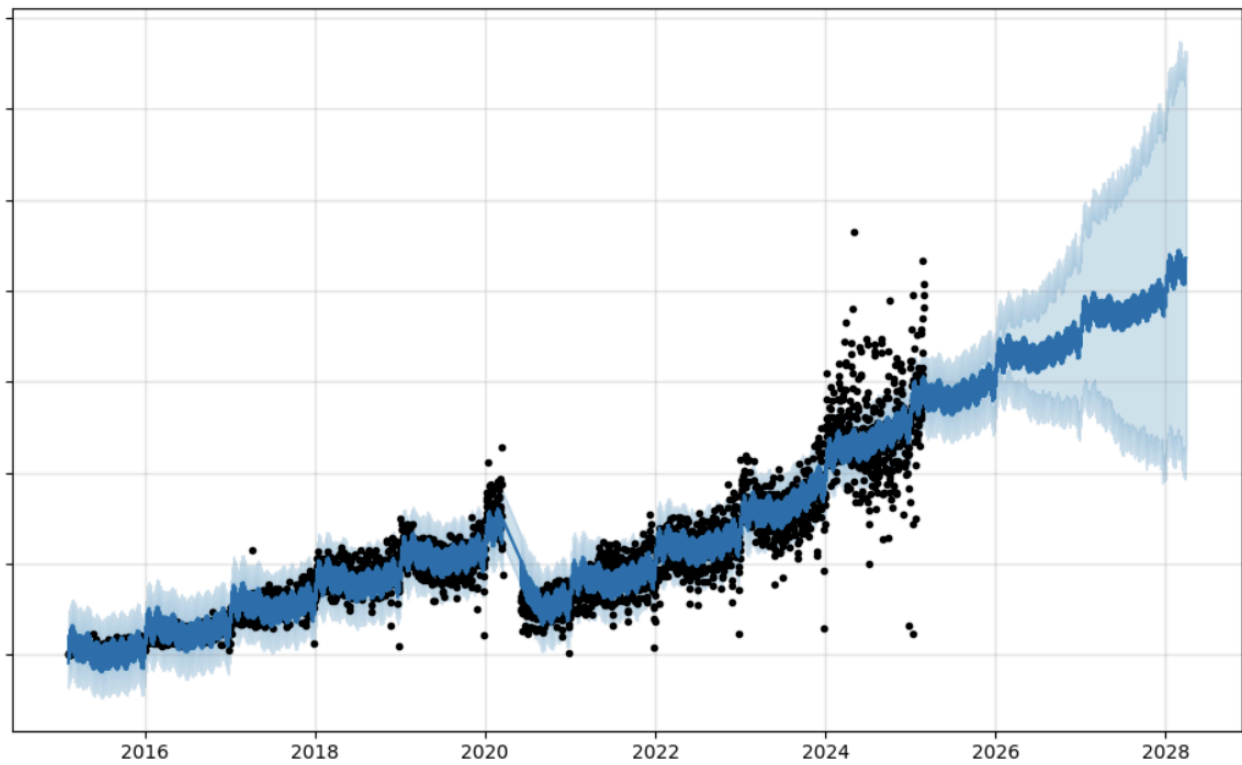
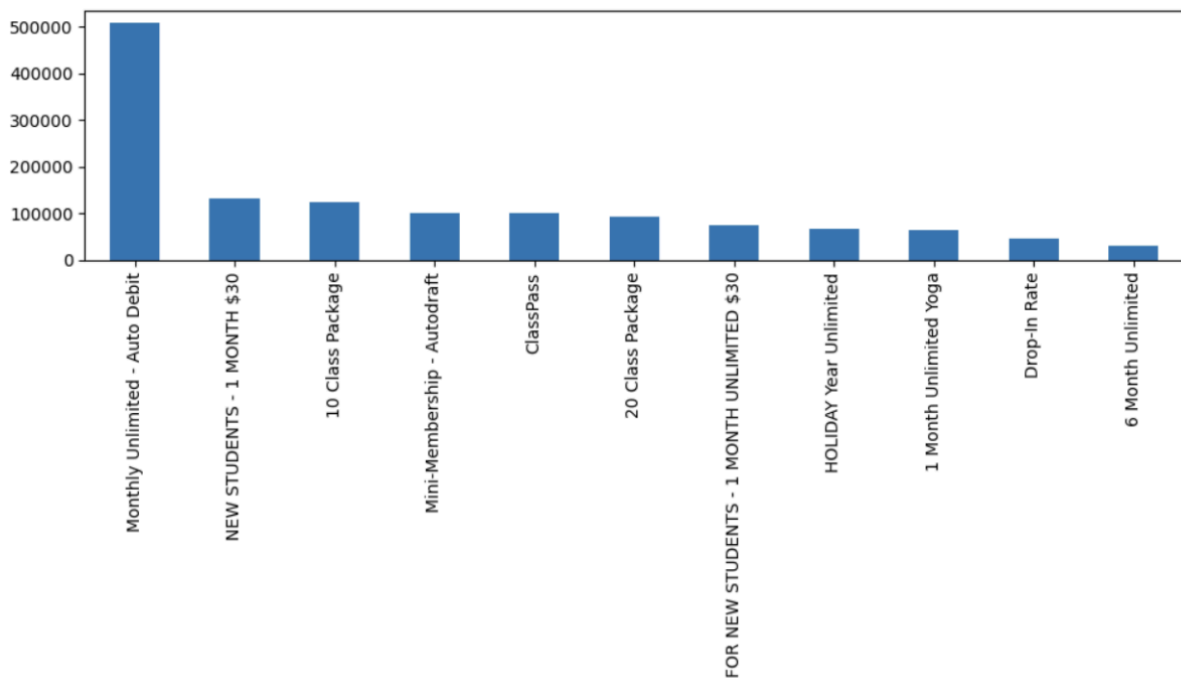


Fig. 10 Most Popular Pricing Options (All Time)



Case Study II. Saran Pilates - Strategic KPI Automation & Insight Development

“Bree did an incredible job analyzing the financials for my business. He presented everything so clearly and made the numbers easy to understand, which gave me the clarity and confidence I needed to make smarter business decisions. I’m so grateful for his thoroughness and insight!”

-Gabrielle Saran, Founder of Saran Pilates

Client Overview

Saran Pilates is a fitness business offering online Pilates instruction and subscription-based video content. With a growing subscriber base, the business sought deeper insights into key performance indicators (KPIs) such as Customer Acquisition Cost (CAC), Lifetime Customer Value (LCV), and Trial Conversion Rate.

Objective

Determine critical KPIs and automate the collection and reporting of these numbers:

- Customer Acquisition Cost (CAC)
- Lifetime Customer Value (LCV)
- Ad Spend ROI
- Trial Conversion Rates and Churn
- Subscriber Growth Analysis

Approach

Leveraged APIs from Vimeo OTT and QuickBooks to design a fully automated, real-time KPI dashboard. Integrated API-driven data directly into customized Google Sheets for live updates on performance metrics, minimizing manual effort and enhancing data accuracy.

Tools Utilized

- **Vimeo OTT API:** Pulled subscriber and trial data for detailed conversion analytics.
- **QuickBooks API:** Pulled P&L data for CAC, LCV, and Ad Spend ROI calculations.
- **Google Apps Script:** Developed automated processes to:
 - Weekly retrieve subscriber metrics.
 - Aggregate and transform data into actionable monthly KPIs.
 - Continuously calculate metrics such as CAC and LCV without manual intervention.

Outcome & Benefits

- **Real-Time Visibility:** Continuous, reliable access to performance metrics.
- **Accurate KPIs:** Automated systems eliminated manual calculation errors, ensuring accuracy and consistency.
- Enabled **data-driven decision-making**, highlighting opportunities in subscriber retention and targeted marketing.

Skills Demonstrated

- Data Automation & Integration
- API Integration (Vimeo OTT & QuickBooks)
- Advanced Spreadsheet & Google Apps Script Development
- Business Intelligence & KPI Analysis
- Strategic Insights & Recommendations

Tools & Technologies Used

- Vimeo OTT API
- QuickBooks API
- Google Sheets & Google Apps Script
- JavaScript/JSON Data Handling
- Excel for Reporting & Analysis

Select Figures from the Saran Pilates Project

Fig. 1 KPIs - Automatically Updating

Lifetime Customer Value (LCV)

Churn Rate

Conversion rate (from free trial to membership)

Value of Acquired Trial

Retention (average tenure in months)

Cost of Acquiring a Customer (CAC)

Ad Spend ROI

Current Daily Growth Rate

Current Daily Value from New Clients

Fig. 2 Data Map Linking to Spreadsheet Tabs & External Data Sources

Tabs

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[Numbers at a Glance](#)
[Data Map](#)

Data Sources

LCV	-->	Net Rev Total Subscribers Churn Rate	Rev per Subscriber Tab Total Subscribers Tab Churn Rate Tab
CAC	-->	New Trials Ad Spend Conversions	Conversions Tab Inverted P&L Tab Conversions Tab
Conversions	-->	New Trials Trial Conversion Rate LCV	New Trials Tab Conversion Rate Tab Numbers at a Glance Tab
Rev per Subscriber	-->	Net Subscriber Rev Total # Subscribers	Inverted P&L Tab Total Subscribers Tab
Inverted P&L	-->	Transposed P&L Tab	
New Trials	-->	Raw New Trials Tab	
Conversion Rate	-->	Raw Conversion Rate Tab	
Subscribers Lost	-->	Raw Monthly Subscribers Lost Tab	
Churn Rate	-->	Raw Churn Rate Tab	
Total Subscribers	-->	Raw Total Subscribers Tab	
Transposed P&L	-->	Formatted P&L Tab	
Formatted P&L Tab	-->	Mapped P&L Tab	
Mapped P&L	-->	Raw P&L Tab & Mapping Key Tab	
Mapping Key			
Raw P&L	-->	Quickbooks Custom Reports	All Time P&L
Raw New Trials	-->	Vimeo Subscribers Report	Raw New Trials
Raw Conversion Rate	-->	Vimeo Subscribers Report	Raw Conversion Rate
Raw Churn Rate	-->	Vimeo Subscribers Report	Raw Churn Rate
Raw Total Subscribers	-->	Vimeo Subscribers Report	Raw Total Subscribers
Raw Monthly Subscribers Lost	-->	Vimeo Subscribers Report	Raw Monthly Subscribers Lost