

## Leading Financial Excellence — Culture, Strategy & Sustainable Growth

**Instructors:** Ralph Rajs, Strategic Fitness Leader & Larry Conner, CPA, RVP at Genesis Health Clubs

### 1. Welcome & Course Overview

#### What You'll Learn

- Align culture and strategy to drive long-term financial results
- Engage staff in financial thinking to build accountability
- Develop leadership habits that foster growth and sustainability

#### Course Description

This final part of the three-part financial series brings together the operational and human elements of financial success. From building a culture of accountability to making data-driven decisions that reflect your values, this is your blueprint for leading financial excellence across your organization.

### 2. Meet Your Instructors



Ralph Rajs

Ralph is a visionary fitness executive with deep expertise in operations and leadership. A longtime mentor in the fitness space, he brings a sharp strategic eye to driving results, with experience spanning fitness, esports, and consumer engagement.



Larry Conner, CPA

Larry is a respected finance expert with 34+ years in the health club industry. As a former GM, CFO, and current RVP of Club Acquisition at Genesis, he blends accounting precision with operational savvy to help clubs run smarter and more profitably.

### 3. Key Terms You Need to Know

**Company Culture:** The shared values, behaviors, and attitudes that shape your organization

**Engagement:** The level of enthusiasm and commitment employees feel toward their work

**Financial Responsibility:** Accountability for budgeting, spending, and understanding financial impact

**Strategic Budgeting:** Planning and allocating resources aligned with long-term goals

**Expense Management:** The process of monitoring and reducing unnecessary costs

**Hands-On Leadership:** Leadership style involving direct support, coaching, and collaboration

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### 4. Course Roadmap

Module No.	Title	Duration
1	Introduction to Finance 3	3 mins
2	Finance and Company Culture	20 mins
3	Revenue Growth Strategies	7 mins
4	Expense Management & Budgeting	21 mins
5	Reporting & Budget Presentation	12 mins

### 5. Module Deep Dives

#### Module 1: Introduction to Finance 3

**Overview:** This module sets the stage for connecting financial KPIs with real-world decisions and leadership behaviors.

**Key Concepts:**

- KPIs must be communicated and applied
- Usage is the #1 KPI
- Financial reporting helps forecast trends

**Action Exercise:** List the KPIs you share most often with your team. How are they used?

#### Module 2: Finance and Company Culture

**Overview:** Aligning financial practices with your values creates a stronger, more resilient business.

**Key Concepts:**

- Culture drives financial outcomes
- Stay true to your mission and values
- Great hires often come from outside the industry

**Action Exercise:** Reflect on one hiring success from outside the industry. What made it work?

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### 5. Module Deep Dives Continued

#### Module 3: Revenue Growth Strategies

**Overview:** This module sets the stage for connecting financial KPIs with real-world decisions and leadership behaviors.

**Key Concepts:**

- Seasonal promotions drive revenue
- Cross-department collaboration creates opportunities
- Avoid sacrificing long-term value for short-term wins

**Action Exercise:** Design a 3-month calendar of themed revenue-driving promotions.

#### Module 4: Expense Management & Budgeting

**Overview:** Smarter spending supports greater profitability.

**Key Concepts:**

- Control costs without cutting quality
- Review budget trends often
- Peer benchmarking helps uncover savings

**Action Exercise:** Choose one budget line and explore 2 ways to reduce the cost without lowering impact.

#### Module 5: Reporting & Budget Presentation

**Overview:** Present budgets with confidence using data to support your requests.

**Key Concepts:**

- Tailor your presentation to ownership needs
- Historical trends guide smart forecasting
- Strategic communication earns trust

**Action Exercise:** Prepare a summary slide or memo supporting one line item with recent trends.

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### 6. Cheat Sheet / Quick-Reference Guide

#### Top Leadership Habits for Financial Success:

- Lead with values
- Share KPIs with teams
- Ask “How can I help?”

#### Smart Budgeting Tips:

- Align with long-term goals
- Use history to forecast
- Communicate with data

#### Culture & Finance Connection:

- Engaged teams = better financials
- Strong hiring = fewer operational gaps
- Mission-led decisions = sustainable growth

### 7. Exercises & Practices

#### KPI Culture Audit

**Goal:** Evaluate how KPIs are shared and used across the team

**Instructions:** Survey staff or run a team meeting focused on how KPIs are communicated. What can improve?

#### Expense Deep Dive

**Goal:** Identify low-impact costs to reduce or repurpose

**Instructions:** Choose 3 recurring expenses and brainstorm ways to cut costs or increase ROI.

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### 7. Exercises & Practices Continued

#### Leadership Self-Check

**Goal:** Strengthen hands-on leadership habits

**Instructions:** Keep a journal for 2 weeks. Log how often you ask your team, “What do you need from me?”

### 8. Next Steps & Call to Action

**Congratulations! You’ve completed Leading Financial Excellence.**

**Here’s how to lead with lasting impact:**

- Align your financial decisions with company culture
- Include staff in the budgeting process to boost buy-in
- Practice coaching over control
- Join the Club Solutions Institute community: [Insert Link Here]