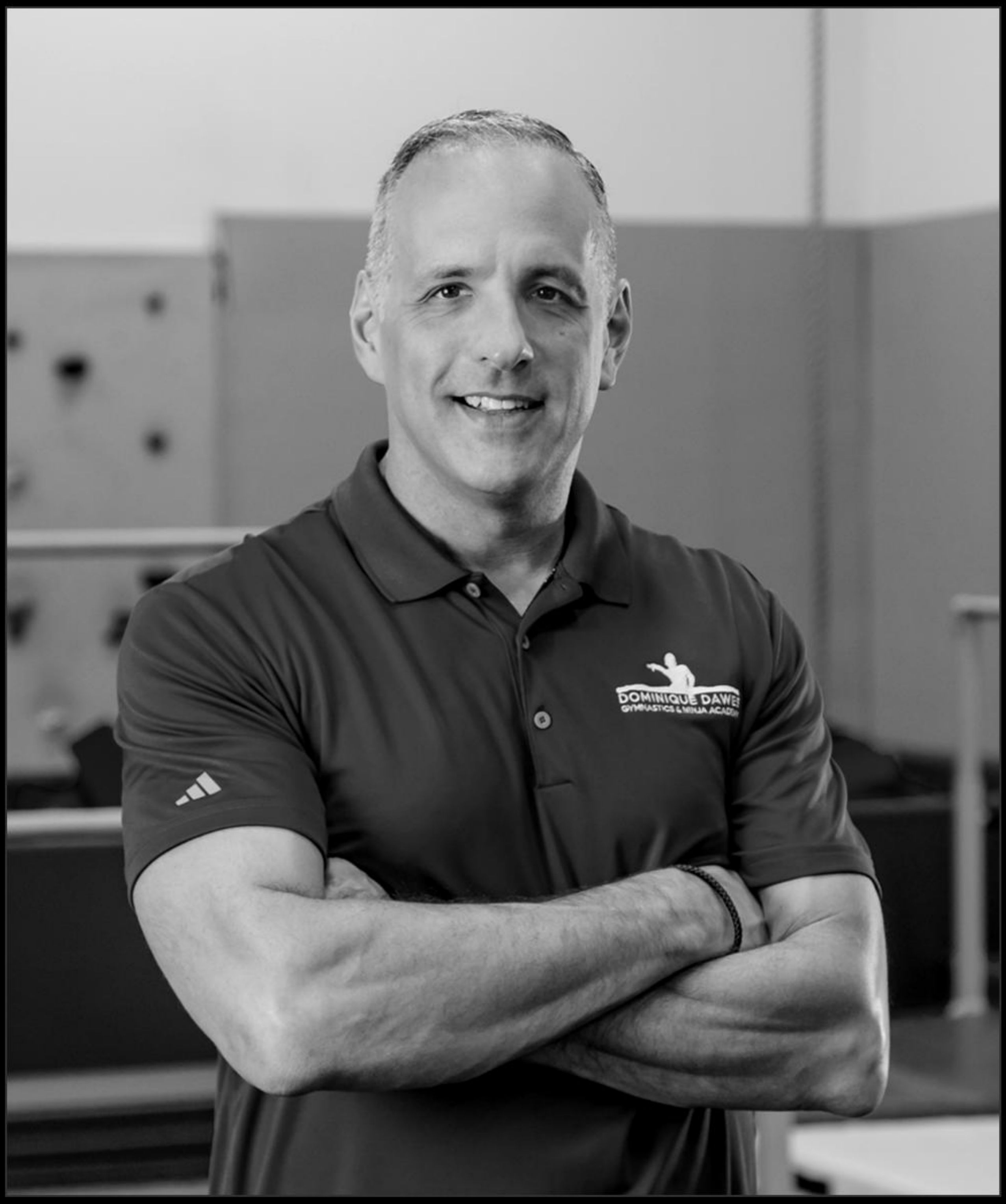
CASE STUDY

How Dominique Dawes Academy is building the data foundation to scale

After Trivest invested in Dominique Dawes, Adam Zeitsiff was brought in as CEO to help lead the business through its next stage of growth.

The ambition was clear. Dominique Dawes was no longer a small single-location operator. It was becoming a multi-location business with a larger platform opportunity ahead of it. That changed the role of data inside the company.



ADAM ZEITSIFF, CEO, DOMINIQUE DAWES ACADEMY

Inputs
FINANCE, CRM AND OPERATIONAL DATA

Planr layer
ONE TRUSTED OPERATING VIEW

Outputs
REPORTING, CADENCE AND SCALE

2-3 days
Target month-end reporting cycle

60 days
Finance team time saved per year

40-50 units
Five-year growth ambition

THE STORY

From fragmented systems to one trusted data layer.

02

THE STORY

At an earlier stage, reporting can survive as a monthly exercise. A few systems, a few spreadsheets, and a finance process built around the close may be enough to keep everyone broadly informed. But once a business is scaling across locations under institutional ownership, that model starts to show its limits. The questions become more frequent, more comparative, and more operational.

- Which locations are ahead of plan?
- Which are drifting?
- How does this month compare with last month?
- How does this quarter compare with last year?
- Are staffing decisions aligned with demand?
- Can leadership trust the same numbers that local managers are using day to day?

Those are not dashboard questions. They are data-foundation questions.

They also matter to both sides of a private equity relationship. For the portfolio company, the issue is operational: can the team run the business with cleaner, faster, more comparable information? For the sponsor, the issue is portfolio visibility: can performance be understood across companies without rebuilding the data model every month? That is the broader Trivest context around this work. Planr has supported the same class of problem across Trivest-related businesses including Pave America, Open Road, Sentinel, and Dominique Dawes. Pave America showed the value of a cleaner data foundation in a mature multi-entity platform. Dominique Dawes shows the same pattern earlier in the scale journey: a fast-growing operating company putting the data foundation in place before complexity compounds.

Before Planr, Dominique Dawes had the ingredients of a reporting model, but they were not yet operating as one trusted layer. Operational data lived in one system. Financial reporting lived in another. The business could see pieces of the picture, but the comparisons Adam needed took too much work to produce and too much effort to trust.

> **“We were pretty much stuck with two silos: point-of-sale KPI and revenue data from the legacy platform, which wasn’t great, and monthly reporting from our bookkeepers.”**

The issue was not simply access to reports. It was the work required to turn those reports into usable management information.

> **“For us, the harder part was the comparison: month over month, year over year, quarter over quarter, gym versus gym.”**

That distinction matters. Private equity-backed companies rarely lack data entirely. They usually have too much of it, spread across systems that were not designed to become a common operating layer. Point-of-sale data, finance data, CRM data, local operating metrics, board reporting, and management views all exist. The harder question is whether they can be brought together, normalised, compared, and trusted.

CONNECTED REPORTING MODEL

Financial data	Operational data	CRM context	One trusted layer

A reliable operating cadence before month end.

That is where Planr became part of the next stage of growth for Dominique Dawes.

Planr connects the systems that matter to the business: point-of-sale data, NetSuite financials, CRM data, and the reporting outputs leadership needs. But the value was not just the connection itself. The more important step was making the data usable.

> **"Planr can take the data from our point of sale, NetSuite, and CRM, bring it all in, and, more importantly, give us the comparison."**

This is the practical version of what we call Private Data Cloud for Private Equity and its portfolio companies. It is not another surface for looking at historical reports. It is the infrastructure layer that sits underneath better reporting, better operating cadence, and eventually better predictions over time.

For Adam, that meant Planr needed to understand the shape of the business, not just plug into a system. The implementation work involved getting close to the underlying data architecture, understanding the point-of-sale system, and making sure the information could be normalised correctly before it became part of the management view.

> **"The Planr team dove in and really understood the data architecture. They got on with the CTO of our point-of-sale vendor to make sure they understood it and could normalise it correctly."**

In a PE-backed operating company, the value of data is not created at the visualisation layer.

It is created further down, in the work of ingestion, mapping, normalisation, permissions, definitions, and consistency. If that foundation is weak, everything built on top of it becomes harder to trust. Once the foundation is stronger, the use cases become more practical.

Adam does not describe the need as real-time alerts every few minutes. He describes a more grounded operating rhythm: a reliable view of the business when the day starts.

> **"It was great to have it all there every day. I don't need real-time updates every five minutes. Every morning, I take a quick look."**

That is the point at which reporting starts to become management infrastructure. Leadership can see the business more clearly. Local managers can see their own location. Teams can understand whether they are tracking toward their monthly goals and quarter-based bonuses.

Staffing decisions can be made with more discipline because the numbers are visible while there is still time to act.

> **"They can log in, see how they're doing against goal every month, and see how they're tracking against their quarterly bonuses."**

The outcome is not simply a better board pack. It is a cleaner operating cadence inside the company.

In Adam's words, Planr helps keep behaviour focused: not overstaffing, not leaving too many people idle at the front desk, not carrying more coaches than the business needs at a given point in time. Those are daily decisions that determine whether a multi-location business scales with discipline or simply adds complexity as it grows.

OPERATING CADENCE

Ingest	Normalise	Compare	Report

From reporting burden to a scalable operating foundation.

The reporting impact is also material. Adam described a monthly reporting package where the first 80 pages were the data required to create the final 20. Planr's role is to reduce that assembly burden and produce a sharper output from the same underlying information.

> **"Our monthly reporting package was 100 pages long, but the first 80 were really just the data that creates the last 20. Planr can pull that together into a 20-page monthly reporting package."**

Over time, Adam expects that to change the finance cadence significantly.

> **"Once it's done, normalised, and tested, our month-end reporting would go from two or three weeks to two or three days."**

The time saved is not the only point. Finance time spent assembling reports is time not spent helping the business understand performance, allocate resources, and support growth.

> **"The big one is the finance team saving around 60 days per year. That alone justifies it."**

For Dominique Dawes, the broader context is scale. Adam talks about an ambition to reach 40 to 50 units over the next five years. That kind of growth changes the burden on the data model. New locations need to be connected quickly. Metrics need to remain consistent.

Management needs a way to compare performance across a larger estate without rebuilding the reporting process each time.

> **"We want to be 40 or 50 units in five years. We had to put the foundation in place now, while we were still four or five units, before we got to 50."**

Without that foundation, growth becomes harder to govern. Adam was clear that operational efficiency and investment decisions depend on clean data being readily available.

> **"Operational efficiencies would be terrible. It would also be hard to justify new units if I don't have clean data readily available showing the return on invested capital."**

This is why the Dominique Dawes Academy story matters beyond one operating company.

2-3 days	60 days	40-50 units
Month-end reporting expectation	Finance team time saved per year	Five-year growth ambition

From one operating company to portfolio-level visibility.

05

When asked what advice he would give another PE firm looking at Planr for its portfolio companies, Adam's answer started with the operating-company reality: cleaner data saves time, reduces manual work, and gives management a more useful view of the business.

> **"It will save them time, money, and multiple days per month. When you're a private equity-backed company, cash and time are king."**

But he went further. At the company level, Planr gives Adam and his team a clearer way to connect operational, financial, and customer data. At the portfolio level, the same pattern points to the larger private equity opportunity: if portfolio companies can operate from cleaner, more consistent data layers, the GP can eventually see one level higher.

Adam made that connection directly.

> **"If you've got 50 portcos, and a lot of them are using the same reporting tool like Planr, you can aggregate one level higher and see all your portco data in one spot. That is critical, and you've never had that before."**

And the implication is clear: a PE firm can take relevant data from each portfolio company and build a single-pane view for finance, portfolio support, and reporting teams.

That is why the story should hit with PE firms and PE-backed companies alike. The first-order value is better operating visibility inside a portfolio company. The second-order value is a more consistent data foundation across the portfolio.

Private equity has spent years improving how it reports the past. The next step is building the infrastructure to understand what is happening sooner, compare it more consistently, and act before the next reporting cycle forces the conversation.

Dominique Dawes Academy shows what that looks like at the operating-company level. A growing business moves from fragmented systems and manual comparison toward one trusted data layer. The CEO gets a daily operating view. Managers get visibility against goals. Finance spends less time assembling the pack. New locations can be connected to the same model. And the GP has a clearer path toward portfolio-level visibility built from the ground up.

That is far beyond another dashboard. It is the data foundation a scaling business needs before reporting, forecasting, and value creation can become more systematic.

Build a cleaner reporting foundation for your portfolio companies.

If portfolio-company data is fragmented across systems, Planr helps turn it into a trusted operating layer.

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