

CASE STUDY

Client:

Paul & Catherine Overwater, hospitality and home inspections, Waikato

Relationship commenced:

2021- ongoing

Client consent:

Full consent to name and publish

The Situation

When Paul and Catherine Overwater came on board in 2019, they were running two businesses between them and feeling anchored by both. Catherine managed Rosetown Motel, a nine-unit property in the Waikato, which was doing well but heavily dependent on midweek corporate bookings tied to a single large local construction project. When that project ended, so would a significant portion of the revenue. There was no structure for forward planning, no strategic marketing for weekend leisure trade, and no clear picture of the business's financial performance beyond the obvious.

Paul, meanwhile, was a franchisee of a national home inspections group. He'd built his operation well, but the franchise model was constraining his growth and his earning potential. His longer-term ambition was to exit the franchise, establish his own independent brand, and build a business he fully owned and controlled.

Behind all of this was a shared aspiration: to design a life with more freedom, less obligation to the properties and commitments that were effectively running them, rather than the other way around.

What We Did

At the motel, we introduced financial reporting disciplines that gave Catherine a clear and objective view of performance, where the money was coming from, where the vulnerabilities were, and what the realistic upside looked like. We oversaw the build of a new website to improve the motel's visibility and support a push for weekend leisure bookings. A guest feedback survey gave us independent validation of the business's strengths and identified areas for improvement.

Alongside the practical work, we focused on something equally important: giving Paul and Catherine the confidence that a different kind of lifestyle was achievable. That shift in thinking led directly to a significant personal decision, the purchase of a family home, allowing them to move out of the motel and draw a clear line between their work and personal lives.

With that foundation in place, we turned our attention to Paul's exit from the franchise. We worked through the process of a structured exit from the group and established QSPlus, Paul's own independently branded home inspections business, giving him full ownership of his client relationships, his brand, and his earning capacity.

The final chapter of the motel story was its sale, a planned, considered exit that freed both Paul and Catherine from the operational demands of hospitality ownership entirely. In time, Catherine also established a small AirBnB operation using a locatable tiny house module on their new property, a low-overhead, flexible income stream that suited their lifestyle priorities rather than dictating them.

The Outcome

Paul and Catherine Overwater are a compelling example of what happens when business advisory goes beyond the balance sheet. QSPlus has grown year on year since its establishment as an independent business. Catherine's Air BnB venture provided a lifestyle-compatible income stream during their transition. And the motel, once a life restricting anchor, was sold on their terms, at a time of their choosing.

The advisory relationship continues. Paul and Catherine rely on ongoing counsel across all aspects of the QSPlus business: strategy, marketing, operational decisions, and future lifestyle planning. They are, as Paul's own testimonial reflects, a business and a family that now operate on their own terms.

“Breton's attention to detail and his ability to communicate succinctly has been very valuable. He has great knowledge and is very professional in all his activities with us. We have managed to achieve goals which we have set with his help, which may not otherwise have been achievable. Definitely an asset to our business.”

— **Paul Overwater, QSPlus**