

CATALYST COLLECTIVE GROUP

CASE STUDY

Preparing Organizations for Sustainable Growth

Building the Infrastructure Before the Expansion

Composite Client Profiles: Healthcare Agency • Restaurant Group • Contracting Business

Client identities and identifying details in this case study have been anonymized and composited to protect confidentiality.

Executive Summary

Rapid growth is the goal every organization says it wants more clients, more locations, more contracts, more revenue. But growth without the infrastructure to support it is not a success story; it is a liability waiting to surface. Catalyst Collective Group (CCG) has repeatedly seen the same pattern across sectors as different as healthcare, hospitality, and construction. Typically an organization gains traction, demand accelerates, and leadership faces a choice between scaling immediately on top of fragile systems or pausing to build the operational, financial, and governance infrastructure that can actually bear the weight of expansion.

This case study examines three anonymized composite engagements, a healthcare agency, a restaurant group, and a contracting business, each of which came to CCG at an inflection point where demand had outpaced their internal capacity. In each case, CCG applied the Catalyst Growth Journey™ to slow down long enough to build the right foundation, then accelerate expansion on top of it. The result across all three engagements was not just growth, but growth the organization could sustain as well as staff, finance, and govern without buckling under its own momentum.

Across these engagements and the broader CCG portfolio, this infrastructure-first approach has helped client organizations form over 100 strategic partnerships, achieve a 5x increase in access to funding opportunities, and build materially stronger alignment among boards, staff, and funders, the kind of alignment that keeps growth from outrunning governance.

The Shared Challenge: Growth That Outpaces Infrastructure

Organizations rarely fail because demand for their work disappears. They struggle because the systems underneath that demand staffing pipelines, financial controls, service delivery workflows, vendor and partner networks, technology, and governance, were built for a smaller version of the organization. When growth arrives faster than infrastructure can absorb it, predictable symptoms follow: service quality becomes inconsistent, margins erode even as revenue climbs, key staff burn out or leave, compliance risk accumulates quietly, and leadership spends more time firefighting than steering.

This pattern shows up differently depending on the sector, but the underlying dynamic is the same:

- A healthcare agency wins new contracts or referral volume faster than it can credential, train, and retain qualified staff, creating quality and compliance exposure.
- A restaurant business opens new locations or expands service faster than it can standardize recipes, train managers, and build supply chains that hold up at multiple sites.
- A contracting business wins larger and more frequent projects faster than it can build the bidding, project management, and cash-flow systems needed to deliver them profitably.

In each case, the instinct is to keep saying yes to growth. CCG's role is to help leadership pause just long enough to build the scaffolding not to slow growth down permanently, but to make sure the growth that follows is durable.

The CCG Approach: The Catalyst Growth Journey™

Across all three engagements, CCG applied its proprietary seven-phase methodology, The Catalyst Growth Journey™, adapting each phase to the specific operational realities of healthcare services, food and beverage operations, and commercial contracting. The table below summarizes how each phase was applied across the three composite clients.

Phase	Healthcare Agency	Restaurant Group	Contracting Business
1. Discover	Assessed staffing pipeline, credentialing backlog, and payer mix risk.	Assessed unit economics, kitchen workflows, and manager bench strength.	Assessed bid-to-win ratio, project margins, and cash-flow timing gaps.
2. Design	Designed a staffing and compliance roadmap tied to growth targets.	Designed a standardized operations playbook for multi-site consistency.	Designed a project intake and estimating framework with margin guardrails.
3. Develop	Built recruiting, onboarding, and QA infrastructure ahead of new contracts.	Built training systems, vendor agreements, and a scalable supply chain.	Built project management systems and a bonding/insurance capacity plan.
4. Deploy	Rolled out new service lines in phased cohorts tied to staffing capacity.	Opened new locations on a staggered schedule tied to manager readiness.	Took on larger contracts in a sequenced pipeline matched to crew capacity.
5. Demonstrate	Tracked quality metrics and compliance outcomes through expansion.	Tracked consistency metrics and guest satisfaction across locations.	Tracked on-time, on-budget delivery and margin performance by project.
6. Deliver	Sustained service quality and retention through continued growth.	Sustained brand consistency and profitability across the growing footprint.	Sustained delivery reliability that supported repeat and referral business.
7. Distinguish	Positioned the agency as a preferred, compliance-strong partner to payers.	Positioned the brand as the reliable, consistent choice in its markets.	Positioned the firm to competitively bid larger, more complex contracts.

Client Profile 1: Healthcare Agency

Building Clinical and Compliance Infrastructure Ahead of Contract Growth

Sector: Home- and community-based healthcare services

Starting Point: A mid-sized healthcare agency with a strong reputation for care quality, fielding a growing volume of referral and contract opportunities that exceeded its current staffing and compliance capacity

Engagement Focus: Staffing infrastructure, credentialing and compliance systems, and payer diversification

The Situation

The agency had built a strong clinical reputation and was being approached with more referrals, managed-care contracts, and expansion opportunities than it could responsibly staff. Leadership was tempted to accept every new contract, but a closer look revealed that credentialing was tracked manually, onboarding took longer than the pace of new hires required, and the agency was overly dependent on a small number of payer relationships. Taking on new contracts without addressing these gaps risked compliance violations, care-quality lapses, and staff burnout, any one of which could undo the reputation that was driving the growth in the first place.

The CCG Engagement

CCG began with a full operational and compliance assessment, mapping the agency's credentialing workflow, staffing pipeline, and payer mix against its growth pipeline. Working through the Design and Develop phases of the Catalyst Growth Journey™, CCG helped the agency:

- Build a structured recruiting and credentialing pipeline with clear timelines tied to contract start dates, closing the gap between winning work and being able to staff it.
- Stand up a quality assurance and compliance monitoring system so growth did not come at the expense of documentation and regulatory standing.
- Diversify its payer and funding relationships, reducing dependence on any single contract and strengthening the agency's negotiating position.
- Sequence new service-line rollouts in phased cohorts tied directly to verified staffing capacity, rather than accepting every opportunity at once.

The Outcome

With the infrastructure in place, the agency was able to accept a substantially larger volume of contract and referral work without the quality or compliance strain that would have come from scaling on the old systems. New staff onboarded faster and stayed longer, compliance documentation held up under payer and regulatory review, and the agency's diversified funding base gave leadership room to negotiate from strength rather than urgency. Growth that once felt risky became a controlled, repeatable process.

Client Profile 2: Restaurant Business

Standardizing Operations Before Multi-Location Expansion

Sector: Food and beverage / hospitality

Starting Point: A single flagship location with a loyal following and strong unit economics, facing pressure to expand into additional locations faster than its operations could standardize

Engagement Focus: Operational playbooks, management bench strength, and supply chain scalability

The Situation

The restaurant's flagship location was thriving, and ownership had real estate and investor interest lined up for a second and third location. But a closer look showed that the recipes, training, and day-to-day management existed mostly in the heads of a few long-tenured staff rather than in documented systems. Suppliers were sized for a single kitchen, not a growing footprint, and there was no bench of trained managers ready to run a second site to the same standard as the first. Opening additional locations on this foundation risked diluting the very consistency and quality that had built the brand's following.

The CCG Engagement

CCG worked with ownership through the Design and Develop phases to convert tacit knowledge into scalable systems before a single new location opened. This included:

- Documenting a standardized operations playbook covering recipes, portioning, service standards, and management protocols so quality would not depend on any one individual.
- Building a manager training and development pipeline so a new location would never open without a manager who had already proven the standard at the flagship site.
- Renegotiating and restructuring vendor and supply agreements to ensure consistent quality and pricing could hold across multiple locations, not just one.
- Establishing a staggered opening schedule tied to manager readiness rather than lease availability or investor timelines alone.

The Outcome

When the second location opened, it hit consistency and guest-satisfaction benchmarks close to the flagship almost immediately. This was a result ownership credited directly to having a trained manager and documented playbook in place before opening day, rather than learning on the fly. The supply chain restructuring also improved margins at the original location, meaning the infrastructure investment paid for itself before the second site ever opened its doors. Subsequent expansion followed the same staged, manager-readiness-driven model.

Client Profile 3: Contracting Business

Building Project and Financial Infrastructure Before Scaling Contract Size

Sector: Commercial contracting / construction services

Starting Point: An established contracting business winning larger and more frequent bids than its estimating, project management, and cash-flow systems were built to handle

Engagement Focus: Estimating discipline, project management systems, and bonding and cash-flow capacity

The Situation

The firm had built a solid reputation on smaller projects and was beginning to win larger, more complex contracts, exactly the growth trajectory ownership wanted. But CCG's assessment found that estimating practices were inconsistent from project to project, project management relied on informal tracking rather than a repeatable system, and the firm's bonding capacity and cash-flow planning had not kept pace with the size of the projects it was now winning. Larger contracts meant longer payment cycles and higher exposure, and without the right financial infrastructure, a single project problem could threaten the whole business.

The CCG Engagement

CCG guided the firm through the Design, Develop, and Deploy phases to build the capacity to handle bigger work profitably and safely:

- Standardized the estimating and bidding process with built-in margin guardrails, replacing inconsistent, experience-based guesswork with a repeatable framework.
- Implemented a project management system to track schedule, budget, and change orders in real time across simultaneous projects.
- Developed a bonding and cash-flow capacity plan aligned to the size and pace of contracts the firm intended to pursue, working with financial and surety partners.
- Sequenced the firm's pipeline of larger bids so new project sizes were taken on incrementally, each one proving out the new systems before the next step up.

The Outcome

The firm moved from inconsistent margins and reactive project management to a disciplined, repeatable process for bidding and delivering larger contracts. On-time and on-budget delivery improved, bonding capacity expanded to match the firm's ambitions, and the business was able to competitively pursue contracts it would not previously have had the financial infrastructure to safely take on. Growth that once carried real risk of overextension became a controlled progression built on proven systems.

Results Across the Portfolio

While each engagement addressed sector-specific operational gaps, the underlying discipline was consistent: pause the instinct to grow first and build later, and instead build the infrastructure that lets growth hold. Across CCG's broader client portfolio, this infrastructure-first approach has produced measurable results:

100+ Strategic partnerships created for CCG client organizations	5x Increase in access to funding opportunities	Stronger Stakeholder alignment across boards, staff, and funders
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Common Threads

Three lessons emerged consistently across the healthcare, restaurant, and contracting engagements:

- Infrastructure is not a delay to growth, it is what makes growth safe to accept. In every case, the organizations were already turning away or nervously accepting opportunities before CCG's involvement. Building the right systems did not slow growth down; it made saying yes sustainable.
- The right sequencing matters as much as the right systems. Staging new locations, contracts, or service lines against verified capacity. Staffing, management readiness, bonding capacity prevented the whole organization from being stressed at once.
- Documentation converts individual expertise into organizational capacity. Whether it was a credentialing workflow, an operations playbook, or an estimating framework, formalizing what previously lived in a few people's heads was what allowed each organization to grow without becoming fragile.

Conclusion

Sustainable growth is rarely about finding more opportunities. Organizations in healthcare, hospitality, and contracting alike tend to have more demand than they can safely absorb. The real work is building the infrastructure that lets an organization say yes to that demand without compromising quality, finances, or its people. Across these three composite engagements, Catalyst Collective Group applied the same disciplined, seven-phase approach to three very different operating environments, with the same underlying result: organizations that could grow on purpose, not by accident, and sustain that growth once it arrived.

About Catalyst Collective Group

Catalyst Collective Group (CCG) is a strategic growth and business development advisory firm that helps organizations build the partnerships, positioning, and operational capacity required to scale outcomes. We support nonprofits, government agencies, educational institutions, healthcare organizations, foundations, and mission-driven businesses with solutions that include executive strategy, partnership development, operational excellence, revenue diversification, and community impact planning—ensuring growth is aligned, measurable, and sustainable.

Our mission is to transform ideas into investment, partnerships into progress, and vision into measurable, sustainable impact.

Catalyzing Growth. Building Influence. Creating Legacy.