

Case Study: How We Grew EBITDA 94% on 25% Less Revenue in Year One

From Operational Islands and Tribal Knowledge to a Scalable, AI-Enabled Organization

The Asset

The owner of these two brands had ambitious growth goals, talented people, and real revenue. What the organization lacked was the infrastructure required to turn any of that into something sustainable.

When Sara Flowers was brought in to lead operations, she wasn't walking into a business with outdated systems.

She was walking into a business that largely had no systems at all.

The executive who brought Sara into the organization had worked with her before and believed the company did not have a talent problem. It had an infrastructure problem.

By the end of the first year, EBITDA would increase from approximately \$1.8 million to \$3.5 million despite a 25% reduction in revenue. But before that could happen, the infrastructure underneath the business would have to be rebuilt from the ground up.

The executive summarized the starting point with a single sentence that turned out to be an understatement: "There wasn't a system in the building."

Sara assumed that meant within the departments she would directly oversee. Within her first thirty days, she understood it ran far deeper than that.

She asked for an org chart. Human Resources didn't have one.

She asked for a marketing calendar. The marketing department — running multi-million dollar campaigns across two brands — didn't have one.

She set out to create a master inventory of every software tool, vendor, and platform in use across the organization. What she found was that nobody in accounting had ever done this. Duplicate accounts existed across departments. People were using personal accounts because they assumed they couldn't get company access. One account costing approximately \$15,000 annually had never been properly set up — its four user licenses sat unused while the bill continued to auto-renew.

Critical revenue-generating processes existed entirely in the heads of individual employees.

One organization's most important continuity asset — a monthly print newsletter that served as the primary vehicle for retaining subscribers for one of the brands, with all roads leading to getting people into that program — lived inside one man's head. He had one writer managed through Basecamp, another through his personal Skype account, and others elsewhere. There were no standardized timelines. There was no documented process. Issues were going to print two days before the deadline, every month, because that was the only way it had ever worked. If that person had left, become unavailable, or simply made a mistake, a primary revenue-producing asset would have been immediately at risk.

The flagship continuity program for the other brand was being assembled personally by the VP of Marketing. A VP of Marketing — stopping every month to coordinate a newsletter, not because it was his job, but because no system existed to move that responsibility anywhere else. The opportunity cost of that arrangement alone was significant.

The newsletter wasn't the problem. It was the symptom.

The same pattern existed throughout the organization. Departments operated as independent islands with limited visibility into one another's priorities, workloads, or dependencies. People inside the company described the culture this way — everyone was working hard, but almost no one was working together.

What looked like a communication problem, a staffing problem, or a productivity problem was actually something more fundamental.

The organization was not operating on systems. It was operating on memory. And memory, as a business infrastructure, has a single critical flaw.

It only works as long as the person carrying it stays.

The Diagnostic

When Sara began conducting audits across departments, a pattern emerged quickly.

Every long-tenured employee had developed their own way of doing things. Not out of negligence — out of necessity. The systems hadn't existed, so the people had become the systems. The MarTech director and VP of Marketing managed projects together in a private workspace that no one else could decipher. There was no documentation, no onboarding guide, no way for anyone outside those two people to

understand what was happening or why. Sara created that guide within her first three months.

The greatest operational risks in the organization were largely invisible — not because leadership wasn't paying attention, but because the workarounds people had built to compensate for the absence of infrastructure had become normalized. Things were getting done. Revenue was being generated. From the outside, the business appeared to be functioning.

What wasn't visible was how fragile it all was.

Every single point of failure hiding in the organization represented a moment where one person leaving, one person making a mistake, or one person becoming unavailable could bring a revenue-producing process to a halt.

The challenge was not simply to document work.

The challenge was to build an organization capable of consistently producing high performance regardless of who occupied any particular role.

The Work

Sara's first objective was not technology. It was not even process.

It was culture.

The organization had developed an informal but deeply entrenched division between departments. Teams operated in silos. Visibility was limited. Priorities shifted constantly. People were busy, but alignment was rare. The meeting structure that existed before Sara arrived was run by someone who had no interest in a leadership role and had been put in charge of a meeting he didn't want to run. He read notes aloud from a workspace that only he and one colleague could navigate.

Sara replaced that structure with something built around three questions.

What was your win? What are you working on? What do you need?

She called them the Three W's. The simplicity was intentional. The structure created something the organization had largely lacked: shared visibility. Team members began seeing for the first time how their work affected other departments. Someone delaying a task they considered low priority would hear, in that meeting, that it was blocking something critical for a colleague. Bottlenecks that had been invisible became visible. Dependencies surfaced naturally through conversation. The us-versus-them dynamic that had calcified over years began, gradually, to dissolve.

People who had been working on islands started working together.

From that cultural foundation, Sara began building the operational infrastructure to support it.

Project management systems were standardized. Documentation standards were defined. Templates, checklists, and governance processes were created. Reporting structures were implemented. Cross-functional workflows were mapped. Training systems were developed. Accountability mechanisms were introduced.

The newsletter that had lived in one man's head became a fully documented system — content timelines, writer management, proofing processes, design handoffs, print deadlines — all of it captured in a format that anyone on the team could follow and execute. The VP was freed from the monthly assembly work he had been doing personally for years.

Over time, Sara developed more than 200 SOPs, templates, checklists, and operational resources spanning operations, project management, marketing, continuity programs, communications, vendor management, ecommerce operations, Amazon, Walmart, NetSuite, training, and numerous other business functions across both brands.

The philosophy behind every one of them was the same.

Sara describes her approach as building systems that are 'goat-proof.' The term comes from the reality of owning goats — animals that are constantly testing fences, getting their heads stuck, and finding every possible way to escape a pen no matter how well designed it seems. Building a goat-proof pen means anticipating every failure point in advance, not just the obvious ones.

The same principle applies to operational systems. Not systems that work only when the right person follows them perfectly. Systems that work consistently regardless of who inherits them — because the process itself carries the operational burden, not the person executing it.

That philosophy was tested directly. A team member joined the organization with significant gaps in the technical skills the role required. She succeeded anyway — not because expectations were lowered, but because the systems carried much of the operational burden. The role got done. The work moved forward. The system didn't care who was executing it.

Alongside process development, Sara built a full operational management infrastructure: quarterly planning systems, initiative tracking, leadership visibility dashboards, cross-functional coordination frameworks, and a comprehensive team

development program built around five competency tracks — proactive problem-solving, effective communication, strategic thinking, ownership and accountability, and team leadership. Project managers who entered the role with varying levels of experience were now being trained, assessed, and developed against real professional standards.

The organization was no longer dependent on memory. It was becoming dependent on systems.

The AI Opportunity

Only after this foundation existed did AI become a meaningful force multiplier.

Many organizations attempt to use AI to compensate for operational weaknesses. Sara took the opposite approach: build the infrastructure first, then amplify it.

As processes became standardized and documented, AI could be deployed effectively because it now had a stable environment to operate within. Custom GPTs were developed across multiple business functions — a Marketing Operations Team Assistant trained on the organization's own SOPs and workflows, an Article Writing Bot, an Article Fact Checker, an Image Prompt Creator, and a Label Proofer, among others. A prompt library was created and governed. AI workflows were documented and trained across the team. Best practices were established, including formal guidance on avoiding confirmation bias in AI-assisted work.

Marketing processes that had previously consumed significant leadership time became increasingly systematized. Recurring deliverables became faster to produce. Knowledge that had lived in individuals became accessible to the team. Execution became more consistent.

More than 24 custom GPTs and AI-supported workflows were ultimately deployed across business functions.

AI did not create the transformation.

AI accelerated it.

The Result

EBITDA increased from approximately \$1.8 million to \$3.5 million in the first year — 94% growth, on 25% less revenue.

More than 300 operational breakdowns were identified and resolved.

More than 200 SOPs, templates, checklists, and operational systems were created and implemented across both brands.

Over 24 custom GPTs and AI-supported workflows were deployed across core business functions.

Headcount was reduced by approximately 25% while organizational output was maintained.

Single points of failure — the newsletter that lived in one man's head, the marketing calendar that didn't exist, the VP spending time every month on work that belonged to a coordinator — were systematically eliminated.

In the words of the executive who brought Sara into the organization:

"Sara's consulting and training is the missing link in your business. Her systems have enabled us to make over an additional million per employee. She's incredibly professional, dedicated, creative and resourceful. I've brought her into multiple businesses I've led, and I highly recommend her to any company looking to grow and scale without stress and sacrificing sanity and well-being."

What This Case Proves

Many leaders believe their next stage of growth will come from additional revenue, additional people, or additional technology.

In most cases, the actual constraint is operational infrastructure.

Businesses do not scale because talented individuals work harder. They scale because knowledge becomes transferable, processes become repeatable, accountability becomes visible, and performance becomes systemic rather than individual.

This case also proves something about organizational culture that is consistently underestimated: culture is not built through values statements or motivational messaging. It's built through structures that create shared visibility, shared accountability, and shared ownership of outcomes. The Three W's were not a team-building exercise. They were an operational intervention that changed how people understood their relationship to each other's work.

And AI — for all its capability — cannot do any of that.

AI can accelerate a high-performing organization. It cannot create one. Deploying AI into an environment without documented processes, without standardized workflows,

and without a culture of accountability is not a transformation. It is an expensive way to do the wrong things faster.

EBITDA did not increase despite the work of building systems, eliminating single points of failure, creating visibility, and developing a culture of high performance.

EBITDA increased because of it.

Every eliminated bottleneck increased throughput. Every documented process reduced risk. Every removed single point of failure increased resilience. Every leadership hour reclaimed from administrative coordination increased strategic capacity. Every AI workflow amplified a process that had already been standardized.

The financial outcome was not separate from the operational transformation.

It was the direct result of it.

This approach works for organizations that are willing to do the foundational work before reaching for the technology — and for leaders who understand that building systems, eliminating single points of failure, and creating genuine operational visibility is exactly what makes everything else possible.

It does not work for organizations that want the results of operational excellence without the discipline required to build it sustainably.