

CATALANT

2025

San Francisco

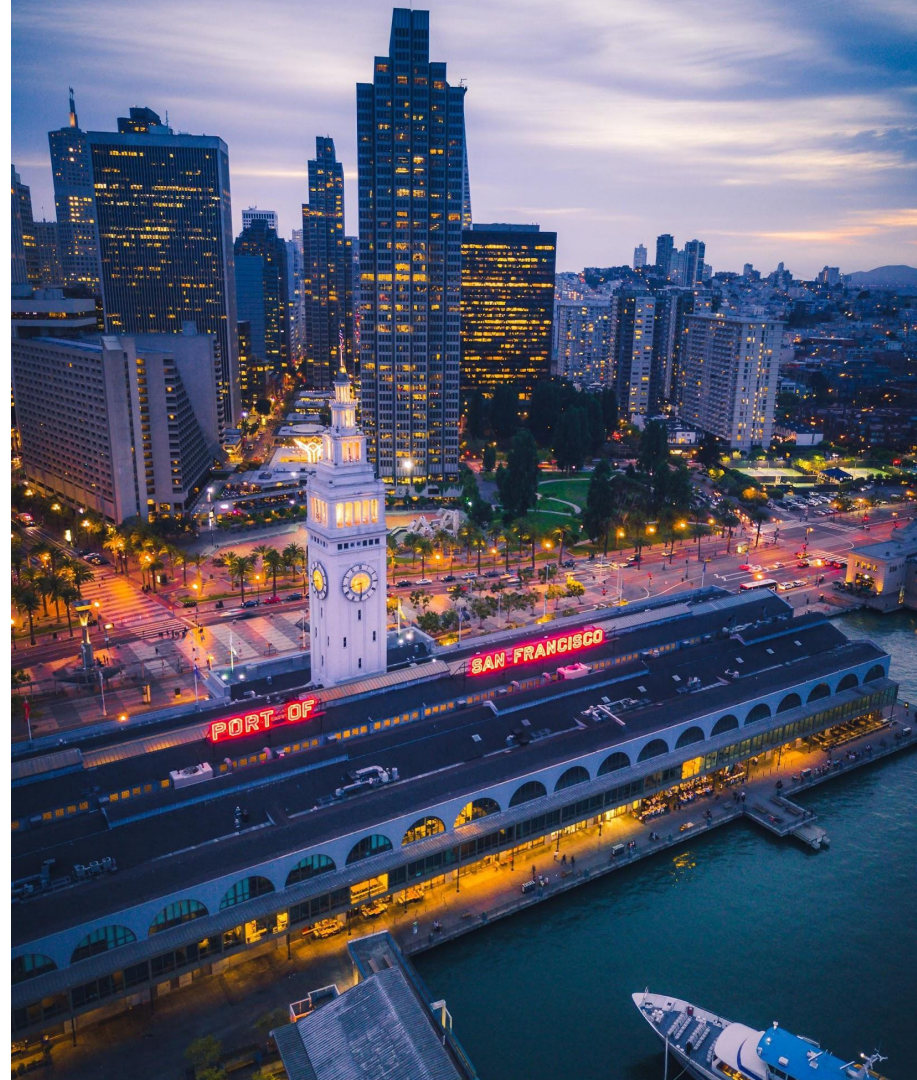
Expert Forum

Pre-Read & Resources

June 24, 2025 | San Francisco, CA



Catalant Expert Forum

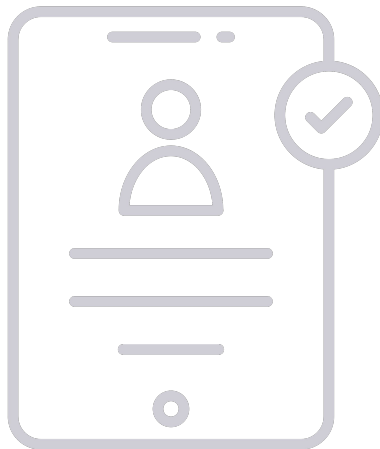


Agenda & Logistics



Agenda

Registration opens and light breakfast	9:30 AM
Emcee Introduction	
Welcome & Agenda	10:00 – 10:10
Opening Remarks	10:10 – 10:20
Catalant Strategy / Consulting 2.0	10:20 – 10:40
Look Behind the Catalant Curtain: Practice Community	10:40 – 11:00
	Break
Look Behind the Catalant Curtain: Marketing	11:15 – 11:30
Look Behind the Catalant Curtain: Expert Product & Services	11:30 – 11:45
Look Behind the Catalant Curtain: Build	11:45 – 12:00
Look Behind the Catalant Curtain: Q&A	12:00 – 12:15
	Lunch
Expert Panel: Leveraging AI in Your Practice (+Q&A)	1:00 – 1:45
	Break
CC Team Overview and Intros	2:00 – 2:20
Breakout Room Instructions / Closing Remarks	2:20 – 2:30
Breakout Rooms	2:30 – 3:45
Networking Reception	4:00



Logistics and FAQ

Event Details



Event

2025 San Francisco
Expert Forum



Date

Tuesday, June 24, 2025



Time

9:30 am – Registration & breakfast
10:00 am – Programming begins



Location

Edge & Node House of Web3
Building 103, 103 Montgomery St
San Francisco, CA 94129

Arrival Instructions

When you arrive at the House of Web3 front entrance, please use the call box and mention you're here for the Catalant event. A team member will be right out to direct you to the registration desk.

Logistics

Dress Code Business / smart casual

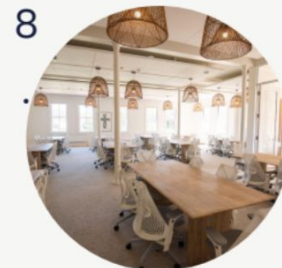
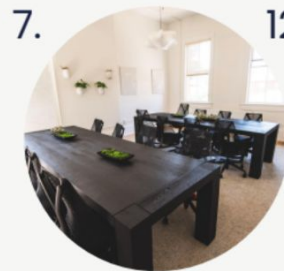
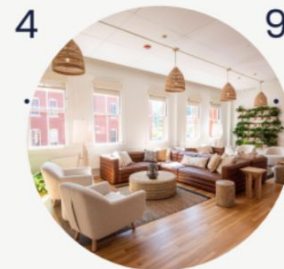
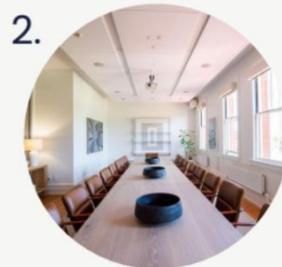
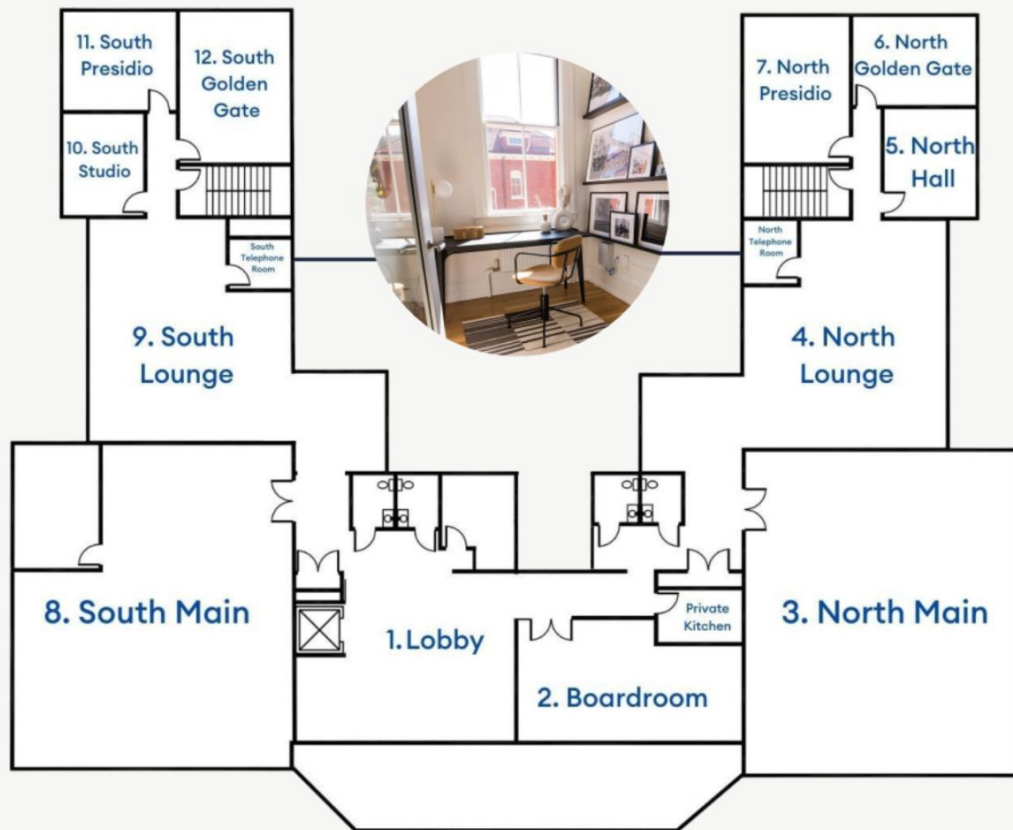
Dietary Restrictions If you haven't already shared any dietary restrictions, please let me know ASAP.

Transportation

Parking: There's a large public parking lot directly in front of the building, just across the lawn. Parking is \$2.50 per hour, with a daily maximum of \$12.50.

Air: The closest airport is SFO, a 35 minute drive from to the venue.

Floor Plan

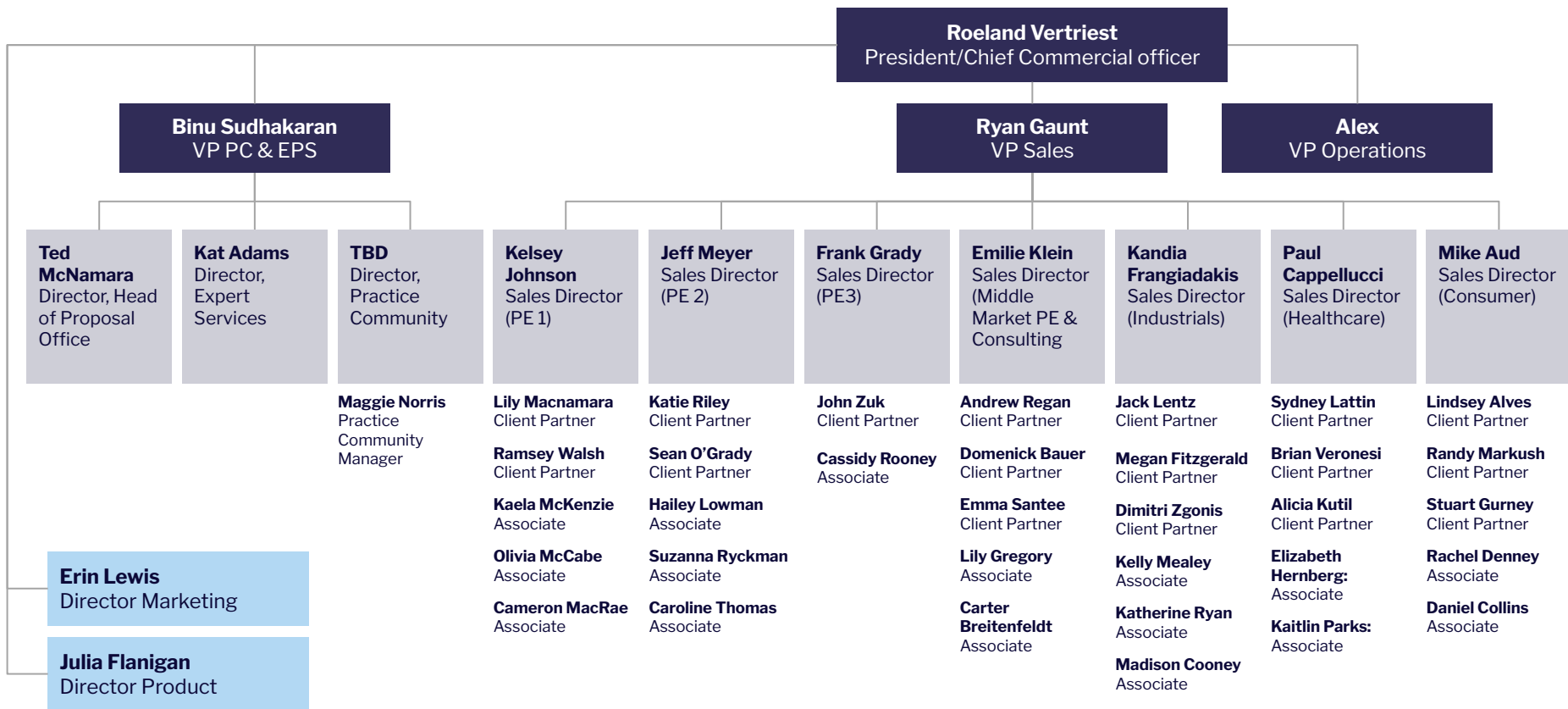


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Client Community Team Overview





Cross Functional Leaders

Description of Roles:

Sales Director – Manages associates and client partners, while setting the strategic direction for the team.

Client Partner – Responsible for selling Catalant's services within their designated industry.

Associate – Works closely with experts and clients to facilitate the project matching process.

Client Team Overview



Private Equity 1 (led by Kelsey Johnson)

Client Partners

Ramsey Walsh
Lily Macnamara

Associates

Kaela McKenzie
Olivia McCabe
Cam MacRae

Key Accounts

Warm

Advent International
Bain Capital
Carlyle
American Securities
Gemspring Capital
Platinum Equity
Vistria Group
Berkshire Partners

Warming

Goldman Sachs
Hg Capital
Searchlight Capital
TA Associates

Team Focus and Goals

PE1 focuses on bulge bracket Private Equity firms primarily on the east coast (with some exceptions). Our team is currently focused on partnering with PC members to sell Teams based engagements at all key accounts. Some areas we have ID'd and are beginning to partner with clients on:

- Bain Capital: Category management, Operational Performance management, Operational overhead transformation, and Conversion cost transformation
- Healthcare Technology company: Global consolidation of shared services, Call center consolidation, and Operations transformation
- AI Initiatives
- PMO/IMO

Private Equity 2 (led by Jeff Meyer)

Client Partners

Katie Riley
Sean O'Grady

Associates

Hailey Lowman
Suzy Ryckman
Caroline Thomas

Associate Emeritus:
Ted McNamara

Key Accounts

Warm

1. Apollo
2. KKR
3. Charlesbank
4. TPG
5. EQT
6. H.I.G

Warming

1. Brookfield
2. Blackstone
3. Warburg
4. SVP Global

Team Focus and Goals

PE2 focuses on bulge bracket Private Equity accounts primarily in New York, Boston and Chicago.

Our team is currently focused on :

1. Expanding into new portfolio companies at our “Big 6” accounts in the first half of 2025
2. Doing a lot more work with our “warming” accounts
3. Leveraging experts in our sales process
4. Trying to uncover larger, team-based consulting engagements

Private Equity 3 (led by Frank Grady)

Client Partners

John Zuk

Associates

Cassidy Rooney

Key Accounts

Warm

Genstar

Warming

Hellman & Friedman
Clearlake Capital
Thoma Bravo
BDT & MSD Partners

Cold

Accel-KKR
Francisco Partners
Oaktree Capital Mgmt
Permira
TCV
Leonard Green

Team Focus and Goals

Newest PE segment - focused on West Coast large cap PE firms. The team is focused on rapid scale, both on internal capacity and external relationships.

In order to achieve rapid scale, we are looking to partner with industry experts, grow connections, and focus on winning high value work with deal teams and operating partners

Mid Market PE and Consulting (MMPEC) (led by Emilie Klein)

Client Partners

Dom Bauer
Andy Regan
Emma Santee

Associates

Carter Breitenfeldt
Lily Gregory

Key Accounts

Warm

GI Partners
HGGC
Verlinvest
Kohlberg
Oliver Wyman
OceanSound

Warming

AEA
Towerbrook
Frontenac
Simon Kucher Partners

Cold

Arsenal
Harvest Partners

Team Focus and Goals

MM PEC focuses on Middle and Lower Middle Market Private Equity firms, and Consulting Firms of all sizes.

Within PE, our team is currently focused on expanding into new portfolio companies at our “Big 6” accounts in the first half of 2025, and landing our first few wins at our “Warming” and “Cool” accounts.

For Consulting, we are looking to identify Tier 2 firms that are experiencing growth, and forward-thinking firms who are open to leverage Catalant as a core part of their staffing model

Industrials (led by Kandia Frangiadakis)

Client Partners

Jack Lentz
Megan Fitzgerald
Dimitri Zgonis

Associates

Kelly Mealey
Kat Ryan
Maddie Cooney

Key Accounts

Warm

Dupont
Ecolab
Marmon
Schneider Electric
Trane
Ansell
Waters
Dolby

Warming

Koch
Industries
Legrand
3M
FMC
Honeywell
Wabtec

Cold

Cargill
Caterpillar
Ford
JCI
GE

Team Focus and Goals

We have 5,000+ accounts in our segment covering all things industrials, financial services, software and technology. Our main mission is to expand our existing industrial relationships and find the next 5 Dupont's (one of Catalant's largest spending accounts) while penetrating into financial services technology/software. A big focus for us in 2025 is co-selling with our industry leads and practice community members. We are looking to identify an industry lead to partner with on our industrial accounts. The industrials segment has had the most large teams engagement opportunities as an alternative to large consulting firms over the last 12 months compared to other segments at Catalant. Selling large teams engagements as an alternative to large consulting firms is a key focus for us.

Financial Services and Tech (led by Kandia Frangiadakis)

Client Partners

Jack Lentz
Megan Fitzgerald
Dimitri Zgonis

Associates

Kelly Mealey
Kat Ryan
Maddie Cooney

Key Accounts

Warm

Fidelity, Donnelly Financial

Warming

BlackRock
Citizens Bank
American Express
Prudential Financial
M&T Bank
Liberty Mutual
Dell
Intuit
HPE
Other accounts that spend
but not consistently: Morgan
Stanley, LPL, Synchrony

Cold

All other financial services
and tech

Team Focus and Goals

We have 5,000+ accounts in our segment covering all things industrials, financial services, software and technology. Our main mission is to expand our existing industrial relationships and find the next 5 Dupont's (one of Catalant's largest spending accounts) while penetrating into financial services technology/software. A big focus for us in 2025 is co-selling with our industry leads and practice community members. Selling large teams engagements as an alternative to large consulting firms is a key focus for us.

Healthcare and Life Sciences (led by Paul Cappellucci)

Client Partners

Sydney Lattin - Life Science Focus
Brian Veronesi - Life Science Focus
Alicia Kutil - Payor/Provider Focus

Associates

Elizabeth Hernberg
Kaitlin Parks

Key Accounts

Warm

Pfizer
MGB
Highmark
CVS

Warming

Moderna
Biogen
Becton Dickinson
Boston Scientific
Medtronic
J&J

Cold

GSK

Team Focus and Goals

- Continue to grow Pfizer - currently ~750K net per quarter but there is still significant white space as well as opportunity to deliver teams based engagements
- Warm up other current (active MSA) Life Science Accounts - Johnson & Johnson, GlaxoSmithKline, Becton Dickinson, Medtronic, Boston Scientific, Biogen
- Initiate 3-4 MSA processes with net new logos
- Establish our Healthcare (Payor / Provider) practice - currently have 3 clients (MGB, Highmark, and CVS) but limited spend; need to get to consistently run rate of 500K net by end of Q2 through combination of account growth and account acquisition

Consumer (led by Mike Aud)

Client Partners

Randy Markush
Lindsey Alves
Stuart Gurney

Associates

Rachel Denney
Danny Collins

Key Accounts

Warm

Walmart
Mars
Estee Lauder
Nestle

Warming

General Mills
Nestle
Clorox
Victoria Secret
Nike

Cold

Unilever
Capri
McDonalds

Team Focus and Goals

The Consumer team aims to double its Net Bookings in 2025 by securing more strategic engagements with C-Suite executives. By year-end, the strategy will focus on deepening verticalization by segment—such as luxury goods, apparel, food & beverage, QSR, and more—and identifying domain experts with specialized experience for each.

Also looking to open the Hospitality segment.

03 Directory of Attendees



Directory of Attendees

First Name	Last Name	Email
Robert	Alward	robert@lasttheoremstrategies.com
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Sid	Breja	brejaconsulting@gmail.com
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Directory of Attendees

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Helena	Wu	helenaw756@gmail.com
Joakim	Yngve	joakim@forest-grove-consulting.com

Appendix



Maintaining Your Status within the Practice Community

- Keep your availability up to date
- Maintain a thorough and up-to-date profile. Reference [this guide](#) for support
- Be responsive when invited to opportunities
- Adhere to Catalant's [payment terms](#)
- Follow Catalant's [non-circumvention Terms and Conditions](#)
- Keep all proposals and contracts within the Catalant Platform
- Uphold and actively embody the Practice Community Guidelines
- **Have a question? Email PracticeCommunity@gocatalant.com**