

If your organization is growing, but your operations can't keep up this is what happens next:

- ▶ Founders become operational bottlenecks
- ▶ Compliance risk quietly accumulates
- ▶ Revenue leaks through inefficiencies
- ▶ Staff burn out from unclear systems

ZenStrata exists to fix this — before it breaks your organization.

WHO THIS IS FOR

- ▶ Behavioral health agency owners scaling past early growth
- ▶ Healthcare organizations preparing for state or federal contracts
- ▶ Founders stuck in operations instead of leading
- ▶ Multi-site teams lacking governance and structure

WHAT WE DO

ZenStrata Consulting is a Richmond, Virginia-based firm specializing in:

- ▶ Fractional executive leadership
- ▶ Operational redesign & process improvement
- ▶ Governance and authority structure
- ▶ KPI and performance systems

We don't just advise... **we step into leadership gaps and build the systems your organization needs to scale.**

Confidentiality Note: Case studies marked ★ Representative Engagement reflect the scope, methodology, and outcomes typical of this engagement type. Client identities are withheld per confidentiality agreements. All other engagements reflect direct ZenStrata client work.

Behavioral Health Operations

Stabilization, workforce infrastructure, and technology strategy

CASE STUDY 01

Reduced Authorization Delays 35% in 90 Days

Dismantling founder-operator dependency and building the governance infrastructure for state contract expansion

★ **Representative Engagement** — Client identity withheld per confidentiality agreement. Reflects the scope, methodology, and outcomes typical of this engagement type.

Sector: Behavioral Health (Virginia)

Type: Fractional Director of Strategy & Operations

Timeline: 90-Day Project → 6-Month Retainer

THE PROBLEM

A growing Virginia behavioral health organization providing Community Stabilization, Mental Health Skill-Building, and Mobile Crisis Services was scaling faster than its infrastructure could support. The founder was simultaneously acting as CEO, clinical overseer, HR lead, and billing escalation point. No formal RACI, authorization delays exceeding 48-hour benchmarks, inconsistent documentation, and zero KPI visibility. Growth was happening but it wasn't sustainable.

WHAT ZENSTRATA DID

- ▶ Built full RACI accountability framework across all core workflows
- ▶ Defined Program Manager authority boundaries and payer escalation ladder
- ▶ Designed KPI dashboard: authorization turnaround, billing lag, contractor utilization
- ▶ Implemented weekly executive cadence to shift founder from operator to CEO
- ▶ Created SOP library structure across all service lines

THE OUTCOME

- ▶ 35% reduction in authorization delays
- ▶ 22% increase in contractor utilization
- ▶ 40% reduction in founder direct operational involvement
- ▶ Founder transitioned from daily operator to strategic CEO role
- ▶ Clear reporting lines established across all departments
- ▶ Engagement extended into a 6-month performance oversight retainer

35%

Reduction in Auth Delays

22%

Increase in Contractor Utilization

40%

Reduction in Founder Operational Load

6mo

Extended Retainer Engagement

ZenStrata Insight: Founder dependency is not a growth strategy it's a bottleneck. The first job was not to optimize processes. It was to redistribute authority so the organization could function without the founder in every room.

Eliminated Compliance Risk Through Strategic Technology Pivot

Embedded fractional leadership: EHR strategy, website rebuild, and referral infrastructure for a growing behavioral health agency

Client: PL Community Solutions

Type: Fractional Director of Strategy & Operations

Timeline: Active Engagement | 2025–2026

THE PROBLEM

PL Community Solutions needed to move from manual, fragmented workflows to integrated, HIPAA-compliant systems while strengthening its digital presence to support referral growth. The original plan: build a custom Adobe Acrobat intake system with touch-enabled e-signatures. ZenStrata identified that executing this solution would require multiple third-party integrations and HIPAA Business Associate Agreements, introducing unnecessary compliance complexity for a growing agency.

TECHNOLOGY STRATEGY & SCOPE PIVOT

- ▶ Identified compliance risk in custom build before any execution began
- ▶ Recommended a purpose-built Behavioral Health EHR integrated intake, document management, scheduling, billing, and compliance in one environment
- ▶ Redirected scope from standalone intake deliverable toward higher-ROI infrastructure
- ▶ Structured EHR evaluation and implementation planning roadmap

WEBSITE REBUILD & REFERRAL INFRASTRUCTURE

- ▶ Led full rebuild of the PL Community Solutions website structure
- ▶ Redesigned referral intake pathways to reduce friction for partners and clients
- ▶ Implemented structured referral forms to improve intake data quality
- ▶ Enhanced service descriptions and client-facing content
- ▶ Strengthened digital positioning for community partnership development

Avoided

Long-Term Compliance Risk & Technical Debt

EHR

Platform Strategy Delivered

Full

Website Rebuilt & Optimized

Rebuilt

Referral Intake Infrastructure

Strategic Outcome — Scope Pivot as Value Creation

Rather than executing a deliverable that would have created compliance burden and technical debt, ZenStrata exercised fractional executive judgment to redirect resources toward more scalable, defensible infrastructure. This reflects ZenStrata's core value: acting in the client's long-term interest, not just completing line items.

ZenStrata Insight: *The wrong system doesn't just slow you down it creates long-term risk. ZenStrata's value was not just execution. It was the judgment to stop, reassess, and redirect scope before it created compounding operational and compliance problems.*

Governance, Performance & Full STRATA™ Deployment

KPI infrastructure, governance redesign, and data-driven operational standardization

CASE STUDY 03

Full Governance Redesign & Live KPI Infrastructure

Full STRATA Framework™ deployment for a scaling behavioral health organization operating without systems

Sector: Behavioral Health / Healthcare Operations

Type: Fractional COO / Principal Consultant

Timeline: 2025–2026 | Ongoing

THE PROBLEM

A behavioral health organization preparing for growth lacked governance infrastructure, performance tracking, and operational standardization. Without a clear authority structure, reliable KPI visibility, or documented workflows, the organization was operating reactively — unable to identify performance gaps, manage contractors, or demonstrate compliance readiness to funders.

WHAT ZENSTRATA DID

- ▶ Deployed the full STRATA Framework™: Assess → Redesign → Align & Track → Anchor
- ▶ Conducted structural diagnostic across governance, operations, finance, compliance, and performance
- ▶ Rebuilt authority mapping, RACI structure, and escalation frameworks
- ▶ Designed and launched live KPI executive dashboard with variance monitoring
- ▶ Standardized workflows and developed SOPs across key program areas
- ▶ Delivered Stability Index™ Score as the baseline measure of organizational health

THE OUTCOME

- ▶ Documented governance structure with clear decision rights across departments
- ▶ Live KPI dashboard enabling data-driven executive decision making
- ▶ Standardized workflows reducing variability and rework
- ▶ Strengthened compliance posture ahead of funding review periods
- ▶ Scalable infrastructure supporting growth without compounding risk

4-Phase

STRATA Framework™
Deployed

Live

KPI Dashboard
Operational

Full

Governance Redesign
Delivered



Compliance Readiness for
Funding Review

ZenStrata Insight: Growth without governance infrastructure is the fastest path to organizational instability. This engagement demonstrates ZenStrata's full-stack capability: diagnosing root-cause instability, redesigning systems, and anchoring change with measurable performance tools.

CASE STUDY 04

Reduced Data Errors 40% in a Federally Funded Research Program

Redesigning QA workflows and performance infrastructure for a university-affiliated clinical research operation

★ **Representative Engagement** — Client identity withheld per confidentiality agreement. Reflects the scope, methodology, and outcomes typical of this engagement type.

Sector: Academic / Clinical Research

Type: Fractional Operations & Analytics Lead

Timeline: 120-Day Fixed-Term Engagement

THE PROBLEM

A university-affiliated research call center managing federally funded longitudinal studies was operating with manual performance tracking, high monthly data query volume, inconsistent training documentation, and no centralized reporting. Siloed communication between technical and operational teams created data integrity concerns and audit risk — a significant liability in a compliance-sensitive research environment.

WHAT ZENSTRATA DID

- ▶ Redesigned eCRF workflows and eliminated redundant data verification loops
- ▶ Implemented tiered QA review model to improve data quality at source
- ▶ Built executive reporting dashboards and monthly data integrity reporting
- ▶ Standardized training documentation and created SOP governance tracking log
- ▶ Created cross-functional communication model bridging technical and ops teams

THE OUTCOME

- ▶ 40% reduction in monthly data queries
- ▶ 25% faster onboarding for new research staff
- ▶ Improved audit readiness posture across all active studies
- ▶ Standardized training library accessible across teams
- ▶ Reduced operational ambiguity through clear accountability ownership
- ▶ Concluded successfully as a fixed-term strategic engagement

40%

Reduction in Data Queries

25%

Faster Staff Onboarding

Audit

Readiness Posture Improved

Std.

Training Library Built

ZenStrata Insight: In regulated environments, operational quality is compliance. ZenStrata's analytics background informed every design decision — from tiered QA models to dashboard architecture — ensuring the solution was grounded in data, not just process preference.

The Pattern Across Every Engagement

Organizations don't fail because they lack effort. They fail because they lack:

- ▶ Clear authority structures
- ▶ Operational systems
- ▶ Performance visibility
- ▶ Scalable infrastructure

ZenStrata builds those systems.

If you recognize your organization in these case studies...

You're already experiencing the problem. The only question is how long you wait to fix it.

Book a 30-minute strategy call to assess where your organization is breaking down and what it will take to stabilize and scale it.

NEXT STEP

zenstrataconsulting.com

Richmond, Virginia

Or request the full STRATA Framework™ overview

*PMP | CSPO | M.S. Data Analytics | SWAM**