

CASE STUDY · 2026 · CLIMATE ASSESSMENT

From founder-era informality to enterprise architecture that holds.

A founder-led healthcare nonprofit professionalizing at scale — and the CHRO architecting the shift needed to know where her strategy would hold and where it wouldn't. Six climate assessments over fourteen months — each one a stress test of where the new structure was setting and where it needed reinforcement and protection. By late 2025, resistance mitigated. In 2026, transformation underway.

CLIENT

Mid-Market Healthcare Nonprofit
Founder-Led → Enterprise

INITIAL ENGAGEMENT

Climate Assessment
Oct 2024

TRANSFORMATION TIMELINE

Six Assessments · Three Departments
Oct 2024 – Dec 2025

ONGOING PARTNERSHIP

Strategic Advisory & Coaching
2026 –

01 THE VANTAGE POINT

What we saw.

When Vantage entered, the symptoms read as interpersonal — complaints of bias, eroded trust, and broader leadership and management friction. The structural truth was upstream. A founder-era operating model — with informal authority, inconsistent policy, and unclear accountability lines — had not yet given way to the structure the new CHRO was building. Across six assessments in three departments, a pattern surfaced. The same C-suite holdover from the founder era sat at the center of every breakpoint.

02 THE ROADMAP

What we designed.

We deployed the climate assessment as a structural diagnostic — not a one-time investigation, but a recurring instrument calibrated to the redesign already underway. Each assessment read the organization through the **Seven Ps to High Performance**, mapping where **Purpose, Place, People,** and **Process** were holding under the new structure and where the founder-era model still ran underneath. The CHRO had the strategy. We architected the stress test. Climate assessments and investigations protect the culture leaders are building — and that was the work.

03 THE DRIVE

What actually happened.

The pattern read clearly across the series. Six assessments in three departments over fourteen months — each one reading the organization through the same Seven Ps lens, each one surfacing the same upstream tension between the founder-era operating model and the enterprise structure the CHRO was building. By late 2025, the CHRO had clarity on where she needed to act. In parallel, Vantage extended into executive coaching with the new CEO — independent corroboration that built executive alignment around the structural moves the redesign required. By December 2025, the final assessment closed the series. The structural friction had cleared.

[CHRO QUOTE — TBD]

"Quote will appear here once the CHRO selects from the three options provided."

— CHRO, Mid-Market Healthcare Nonprofit

04 THE TRANSFORMATION

Where they arrived.

6

ASSESSMENTS DELIVERED

3

DEPARTMENTS DIAGNOSED

14 mo

TO STRUCTURAL RESET

5 mo

TRANSFORMATION HOLDING

The reset was complete. Founder-era informality, released. Enterprise structure, holding. And the organization — free of the friction that had pulled focus from mission for over a year — was back in the work it was meant to do. In its enterprise era.

Friction wasn't the problem. Friction was the signal. And strategy doesn't hold just by being designed well — it holds by being stress-tested. *Together, we architected the diagnostic that is allowing the strategy to hold.*