

Grow Your Behavioral Health Business

Guidebook for Purpose-Driven Expansion



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ENVIVE Solutions, LLC
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Strategic prompts, tools, and reflection
to help you plan for what's next.





Welcome to the Grow Your Behavioral Health Business Guidebook

So, you want to grow your behavioral health business?

This guidebook is designed as a practical companion – part playbook, part workbook – to help you scale with intention while keeping your mission and people at the center.

Growth isn't just about getting bigger. It's about increasing your impact, building sustainability, and staying aligned with your values. Whether you're responding to long waitlists, expanding to reach underserved communities, or exploring new service lines, the decision to grow is both exciting and complex.

Inside, you'll find prompts, checklists, and key considerations to guide critical thinking about your next steps. This isn't a comprehensive roadmap – every organization is unique – but it is a framework you can adapt to spark clarity, uncover opportunities, and assess your readiness.

You know your organization best. Let this guide serve as a catalyst for reflection, strategy, and mission-driven growth.



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Determining Your Growth Readiness

Before diving in, it's important to assess whether now is the right time to expand. Growth can amplify impact, but it also carries risk. Use this self-check to decide whether to proceed with the chapters ahead or first address foundational gaps. Consider the following before taking your next step:

Top Reasons to Pursue Growth

- ☐ **Meeting Unmet Community Needs:** High demand and long waitlists indicate you can extend services to populations currently underserved.
- ☐ **Financial Opportunity:** Strong margins and healthy cash flow suggest you have the fiscal capacity to invest in new programs or locations.
- ☐ **Strategic Partnerships:** Established collaborations (e.g., with primary care, schools, payers) can provide referral pipelines and shared resources, reducing launch barriers.
- ☐ **Operational Maturity:** Reliable systems—like an efficient electronic health record (EHR), billing, and scheduling workflows—allow you to absorb increased volume without chaos.
- ☐ **Talent Pipeline:** A robust staffing ratio matrix and low turnover indicate you can onboard and support new clinicians without compromising quality.
- ☐ **Competitive Advantage:** A unique value proposition or emerging market niche can be captured before competitors fill the gap.

When to Wait on Expansion

- ☐ **Financial Strain:** High burn rate, unpredictable cash flow, or poor days receivable signal limited runway for new investments.
- ☐ **Capacity Overload:** Chronic overload in current service lines (red capacity status) or clinician burnout warns that quality might suffer under added pressure.
- ☐ **Systemic Gaps:** Outdated or fragmented technology and manual processes risk scaling dysfunction if left unaddressed.
- ☐ **Lack of Clarity:** Without a clear growth statement; strengths, weaknesses, opportunities, and threats (SWOT) insights; or data-driven priorities, expansion efforts can become unfocused and costly.
- ☐ **Market Uncertainty:** Volatile funding streams or policy shifts (e.g., reimbursement changes) may make it prudent to stabilize before scaling.
- ☐ **Team Readiness:** Low engagement or resistance to change suggests the organization may struggle to adopt new workflows or roles necessary for growth.



If many “When to Wait” flags apply, revisit your business or strategic plan and stabilization efforts before exploring new growth opportunities. If now is the time to forge on, dive into Chapter 1: Business Planning and Vision to craft your growth blueprint.



Chapter 1: Business Planning and Vision – Crafting Your Growth Blueprint

This chapter guides behavioral health leaders through defining a clear growth vision, assessing which services to prioritize, analyzing strengths and weaknesses, and translating insights into actionable plans. By the end, you'll have a strategic foundation to make confident decisions about growth.

In Chapter 1, you will develop:

- **Strategic Clarity:** A unifying growth statement that anchors decisions.
- **Prioritized Service Blueprint:** A data- and insight-driven map identifying where to invest or divest.
- **SWOT Insights:** A clear view of internal capabilities and external market forces.
- **Action Roadmap:** Concrete initiatives with timelines, metrics, and accountability.
- **Readiness Check:** An assessment of whether you can scale now or if you must strengthen capacity first (e.g., staffing, technology).

1. Clarify Your Growth “Why”

Why It Matters: A clear growth statement aligns your entire team – clinicians, operations, finance – around a shared ambition. It becomes the touchstone for every decision, from budgeting to staffing.

Who's Involved: The CEO or Executive Leader with key stakeholders: Program Directors, Finance Lead, Clinical Supervisor, and ideally a frontline clinician or board member for real-world insight.

Process and Timing: Host a facilitated workshop (2-3 hours) or send a concise survey (which may include follow-up interviews). Aim to complete within one week to keep momentum.

Outcome: A one- or two-sentence growth statement that is:

- **Specific:** Targets (e.g., “open two rural satellite clinics”).
- **Measurable:** Growth metrics (e.g., “25% more clients”).
- **Time-Bound:** A clear deadline (e.g., “by December 2026”).
- **Quick Tip:** Frame the statement as an “aspirational yet achievable” stretch – enough to motivate without overwhelming.

Appendix Reference: Appendix A, Growth Statement Template



2. Map Service Lines and Capacity

Why It Matters: You can't grow everything. Focus on the services that offer the highest impact. Mapping demand, profitability, and capacity can show where to invest, maintain, or pause.

Who's Involved: CEO/Executive, Program Directors, Finance Lead, Operations Manager, and at least one frontline clinician.

Process: Option 1 Quantitative Approach (Recommended):

Purpose: Use objective data to understand which services are most viable to grow, maintain, or reconsider.

Timeline: 1-2 weeks to extract data; scoring and grid visualization takes a few days.

Step 1: Pull Data

Gather billing, claims, or electronic medical record (EMR) data to capture:

- **Client Volume:** How many clients use each service.
- **Revenue per Service:** How much each service brings in.
- **Margin:** Profitability of each service unit.
- **Utilization:** How full each program or staff role is.
- **Staff Capacity:** Ability to serve more clients without overloading the team.

Step 2: Create a Service Inventory

List every service line, including:

- Outpatient programs
- Telehealth services
- Group therapy
- Other active services or programs

Step 3: Score Services

In a spreadsheet, assign simple ratings:

- **Demand (1-5):** How urgent is client or market need?
- **Margin (%):** Profitability per service unit.
- **Capacity (Green/Yellow/Red):** Can you serve more clients today?

Step 4: Visualize

Plot these scores into a grid for quick comparison:



- **Grow:** High demand and margin, green capacity
- **Maintain:** Balanced scores
- **Reassess/Sunset:** Low demand or margin, red capacity

Step 5: Narrative Guidance

- Use this tool in your leadership huddle.
- Display it on your dashboard and revisit quarterly.
- Adjust scores as you collect new data or learn from experience.

Outcome: A prioritized, data-informed view of where to invest, maintain, or divest resources to maximize impact and growth potential.

Appendix Reference: Appendix B, Service Line and Capacity Mapping Worksheet

Pro Tip: Add Qualitative Insights

- Interview key staff and clinicians to uncover bottlenecks, perceived client demand, and scaling opportunities.
- Collect client feedback via short surveys or conversations to confirm market needs and perceived value.
- Combine these insights with your quantitative scores to refine priorities and strengthen your growth decisions.

3. Conduct SWOT Analysis

Why It Matters: Hard data tells *what* to focus on; SWOT uncovers *why* by exposing internal strengths and weaknesses alongside external opportunities and threats.

Who's Involved: The CEO or Executive Leader with key stakeholders: Program Directors, Finance Lead, Clinical Supervisor, and ideally a frontline clinician or board member for real-world insight.

Process and Timing:

- Share a simple SWOT template (definitions included) with the team 48 hours before your session.
- Ask participants to list their top 2-3 items in each quadrant based on experience and market knowledge.

Facilitation Options:

- **In-House:** Use a Miro board or flipchart; designate a scribe.



- **External:** Hire an organizational development (OD) consultant or workshop facilitator to ensure impartiality and deeper insight.
- **Group Session (45-60 minutes):**
 - Review and refine submitted items.
 - Reach consensus on the top Strengths, Weaknesses, Opportunities, and Threats.

Outcome: A succinct SWOT summary – your qualitative compass for strategic decisions.

Appendix Reference: Appendix C, SWOT Analysis Template and Appendix D, SWOT Guide

Pro Tip: Facilitate a group discussion. Use a transcription service, like [Otter.ai](https://otter.ai), to capture the entire conversation. Ask the group directly to describe the strengths and weaknesses, and opportunities and threats for the organization. Use tools like ChatGPT or Otter to analyze the results by asking the prompt, “define the strengths, weaknesses, opportunities, and threats identified in this conversation.”

4. Prioritize and Translate Insights into Action

Why It Matters: A SWOT is useful only if it shapes what the business does next. This step bridges the analysis with your growth strategy by converting top SWOT findings into focused, actionable priorities.

Process:

Step 1: Select Priorities from SWOT

- Look at the four quadrants side by side.
- For each, ask: *Which single item, if addressed, would most strengthen our growth?*
 - Strengths: Which advantage should we double down on?
 - Weaknesses: Which gap is most urgent to fix?
 - Opportunities: Which trend/option best fuels growth?
 - Threats: Which risk could derail us if left unchecked?

Step 2: Define Action Plans for Each Priority

For each selected item, outline:



- **Objective (What):** Clear, growth-linked goal.
Example: Expand weekend telehealth to capture unmet demand.
- **Key Actions (How):** Practical steps that make the objective real.
Example: Adjust schedules, update booking system, market new hours.
- **Timeline (When):** Specific phases, not vague dates.
Example: Plan in March → Launch in April → Review in May.
- **Owner (Who):** One accountable role, not “the team.”
Example: Clinical Operations Manager.

Step 3: Connect Back to Growth Strategy

- Ask: *How does this action strengthen revenue, market position, or efficiency?*
- Document this link. (e.g., “Weekend telehealth increases patient access and creates a new revenue stream.”)

Step 4: Track and Review

- Log each action in your project management tool or dashboard.
- Use weekly or biweekly check-ins to review progress, barriers, and adjustments.

Outcome: A set of actionable, owner-driven tasks that propel your growth plan forward—and built-in checkpoints to pivot if needed.

Appendix Reference: Appendix E, Action Plan Worksheet

Step 5: Readiness Check

Why it Matters: Before scaling, assess whether your organization can handle growth.

Areas to Check:

- **Staffing:** Do you have the right people in the right roles?
- **Technology:** Are EMR, billing, and scheduling systems ready?
- **Financials:** Do you have reserves for new hires, marketing, or infrastructure?
- **Processes and Policies:** Are workflows standardized for scale?
- **Leadership Capacity:** Can your team handle increased complexity?

Outcome: A clear assessment of whether to proceed with growth now or strengthen capacity first.



What's Next: Use these outcomes to decide if you proceed to financial modeling or pause to shore up gaps—either way, you'll move forward with confidence and clarity.



Chapter 2: Assessing Financial Stability – Understanding Your Fiscal Runway

Financial stability is the bedrock of sustainable growth. Without clear visibility into cash flow, profitability, and risk thresholds, expansion efforts can stall or collapse. This chapter equips leaders with the tools to understand how much “runway” you really have and where to shore up fiscal health before scaling.

In Chapter 2, you will develop:

- **Real-Time Cash Visibility:** A living budget you can update and trust.
- **Risk Alerts:** Key ratio benchmarks that warn of financial stress early.
- **Break-Even Clarity:** The minimum activity level or pricing needed to sustain operations.

1. Build a Living Budget Dashboard

Why It Matters: A dynamic cash-flow forecast lets you anticipate shortfalls or surpluses, test scenarios, and make proactive decisions rather than firefighting reactively.

Who’s Involved: Finance Lead or CFO (in-house or fractional) partnered with the CEO and Operations Manager.

Process:

1. Gather the past 12 months of actual revenue and expense data.
2. Project 12 months ahead with assumptions for volume growth, reimbursement rates, and cost changes.
3. Model best-case and worst-case scenarios ($\pm 20\%$ volume) to stress-test your plan.
4. Update monthly and review in leadership huddles.

Outcome: A live dashboard in Excel or financial software that highlights projected cash balances and variance from targets.

Appendix Reference: Appendix F, Living Budget Dashboard Template

2. Monitor Key Financial Ratios

Why It Matters: High-level ratios provide early warning signs when something’s off – whether it’s slow reimbursements, rising costs, or dwindling margins.



Key Ratios and Targets:

- **Operating Margin:** Percentage of revenue left after expenses (target >10%).
- **Days Receivables Outstanding (DRO):** Average days to collect payment (target <45 days).
- **Burn Rate:** Net cash outflow per month (should align with runway goals).

Process:

1. Define data sources in your accounting system.
2. Automate ratio calculations monthly.
3. Set alerts for when ratios cross thresholds.

Outcome: A ratios dashboard that flags high-risk trends and drives corrective actions.

Appendix Reference: Appendix G, Financial Ratios Dashboard

3. Conduct a Break-Even Analysis

Why It Matters: Knowing your break-even point clarifies the minimum volume or fee structure needed to cover costs, informing pricing and growth targets.

Process:

1. List fixed costs (rent, salaries, insurance) and variable costs per service unit.
2. Calculate revenue per unit (e.g., per session or program).
3. Solve for break-even volume = $\text{Fixed Costs} / (\text{Revenue per Unit} - \text{Variable Cost per Unit})$.

Outcome: A clear threshold—e.g., “we need 300 billable sessions per month to break even”—that informs targets and risk tolerance.

Appendix Reference: Appendix H, Break-Even Analysis Worksheet

What’s Next: Use these financial insights to decide on investment in staffing, technology platforms, or marketing—and ensure you have the funds to fuel growth.



Chapter 3: Evaluating Growth Resources – Auditing Your Capacity and Partnerships

Growth demands more than money – it requires the right people, systems, and partnerships. This chapter helps you audit your internal capabilities and map external collaborators to ensure you have the resources needed to deliver quality care at scale.

In Chapter 3, you will develop:

- **Capacity Roadmap:** A clear view of internal strengths and gaps in people and systems.
- **Technology Action Plan:** A prioritized list of system fixes and upgrades to support scale.
- **Strategic Partnerships:** A pipeline of vetted collaborators and engagement plans.

1. Conduct a Capacity Audit

Why It Matters: Identifying skill, bandwidth, and tool gaps prevents overload and ensures quality doesn't suffer as you grow.

Who's Involved: Operations Manager, HR Lead, IT Lead, plus department heads.

Process:

1. List every key role and system (clinical, admin, IT, billing).
2. Rate each on:
 - **Skills:** Proficiency and training needs.
 - **Bandwidth:** Current workload vs. capacity.
 - **Tools:** Adequacy of software and equipment.
3. Highlight gaps and rank by priority.

Outcome: A gap report pinpointing where to hire, train, or invest in tools.

Appendix Reference: Appendix I, Capacity Audit Matrix

2. Complete a Technology Checklist

Why It Matters: Outdated or clunky systems erode efficiency and morale – the right technology accelerates growth and improves patient experience.

Process:

1. Audit core platforms: EHR, scheduling, billing, reporting, telehealth.



2. Score each on functionality, integration, and user satisfaction.
3. Identify quick wins (e.g., auto-reminders, application programming interfaces [API] integrations) and major upgrades.

Outcome: A prioritized technology roadmap with estimated costs and timelines.

Appendix Reference: Appendix J, Technology Checklist

3. Perform a Partner and Vendor Scan

Why It Matters: Strategic collaborations—whether with medication-assisted treating (MAT) providers, housing agencies, or community organizations—extend your reach and enhance service offerings.

Process:

1. Identify 3-5 potential partners or vendors aligned with your mission.
2. Evaluate fit: capacity, reputation, and integration complexity.
3. Outline engagement steps: Memorandum of Understanding (MoU), referral protocols, data-sharing agreements.

Outcome: A partnership shortlist with clear next steps to initiate or deepen collaboration.

Appendix Reference: Appendix K, Partner and Vendor Scan Template

What's Next: Leverage these resource insights to budget appropriately, recruit strategically, and formalize key partnerships before expanding services.



Chapter 4: Designing Your Staffing Ratio Matrix – Building Your Staffing Framework

Balanced staffing ratios ensure quality care, prevent burnout, and maintain profitability. This chapter walks you through defining, building, and monitoring the ideal clinician-to-client and support-to-clinician ratios for each service line.

In Chapter 4, you will develop:

- **Benchmarked Ratios:** Data-driven staffing standards for each service line.
- **Live Utilization Matrix:** A visual tool that tracks real-time staff-to-client balance.
- **Recruitment Triggers:** Automated alerts and processes to hire before capacity breaks.

1. Define Ideal Ratios

Why It Matters: Standardized ratios help you scale care without sacrificing client outcomes or employee well-being.

Process:

1. Research industry benchmarks for outpatient, telehealth, group therapy, and administrative support.
2. Adjust benchmarks based on your organization's model, acuity levels, and funding structures.
3. Document ratio guidelines in a one-pager reference.

Outcome: A set of staffing ratio standards to guide hiring and scheduling.

2. Build and Maintain Your Matrix

Why It Matters: A live matrix visualizes utilization and triggers hiring needs before waitlists grow.

Process:

1. Create a spreadsheet with rows for each service line and columns for FTE clinicians, support staff, referral coordinators, and supervisor hours.
2. Update the matrix weekly with actual staffing and utilization data.
3. Highlight cells that exceed ratio thresholds.

Outcome: A dashboard that flags when ratios slip beyond acceptable ranges.



Appendix Reference: Appendix L, Staffing Ratio Matrix Template

3. Set Hiring Trigger Points

Why It Matters: Proactive recruitment based on data prevents burnout, maintains access, and safeguards revenue.

Process:

1. Define clear thresholds, e.g., clinician utilization >80%, waitlist >2 weeks.
2. Automate alerts via your project board or spreadsheet.
3. Assign recruitment tasks to HR or operations when triggers activate.

Outcome: An early-warning recruitment system that keeps your team optimized.

What's Next: Integrate your staffing matrix with budget forecasts and operational plans to ensure hiring aligns with financial and strategic goals.



Chapter 5: Driving Change Management and Team Engagement

Growth inevitably brings change – new roles, processes, and technologies. Engaging your team from the start builds buy-in, accelerates adoption, and minimizes resistance.

In Chapter 5, you will develop:

- **Transparent Communication Framework:** Clear, documented messaging to guide your team through change.
- **Champion Network:** A group of influencers driving adoption and modeling new behaviors.
- **Adaptive Feedback System:** Real-time insights that shape ongoing implementation.

1. Craft a Clear Communication Plan

Why It Matters: Clear, consistent messaging reduces uncertainty and aligns everyone on *what's changing, why it matters, and how they benefit.*

Process:

1. Map stakeholder groups: clinicians, administrative staff, leadership, board.
2. Develop tailored messages for each group – covering key changes, expected impact, and support resources.
3. Schedule communication touchpoints: town halls, email updates, and team huddles.

Outcome: A documented communication schedule and message library.

Appendix Reference: Appendix M, Communication Plan Template

2. Identify and Empower Change Champions

Why It Matters: Peer influencers accelerate culture shift and troubleshoot adoption issues in real time.

Process:

1. Nominate 2-3 respected staff from different departments.
2. Involve them in planning, pilot testing, and feedback sessions.
3. Recognize and reward their contributions.



Outcome: A network of champions advocating for change across your organization.

Appendix Reference: Appendix N, Change Champion Nomination Form

3. Implement Continuous Feedback Loops

Why It Matters: Early feedback surfaces roadblocks and improvement ideas before issues escalate.

Process:

1. Launch weekly pulse surveys or suggestion boxes.
2. Hold brief feedback meetings to review input and adjust plans.
3. Close the loop by sharing how feedback informed changes.

Outcome: A responsive change process that adapts based on real-time team insights.

Appendix Reference: Appendix O, Feedback Loop Survey Template

What's Next: Leverage these engagement assets as you roll out new processes, technology, or service lines, ensuring your team grows alongside the organization.



Chapter 6: Market Analysis and Marketing Strategy

Even the best programs need an audience. A targeted marketing approach ensures you reach the right referral sources and clients with compelling messages that drive growth.

In Chapter 6, you will develop:

- **Segmented Market Map:** Clear prioritization of referral and client audiences.
- **Competitive Insights:** An actionable matrix of competitor strengths and service gaps.
- **Messaging Toolkit:** A value proposition and key messages that resonate.
- **Marketing Roadmap:** A tactical plan with budgets, timelines, and performance metrics.

1. Conduct Market Segmentation

Why It Matters: Segmenting your market lets you tailor offerings and outreach – boosting conversion and referral rates.

Process:

1. Identify key segments: primary care providers, schools, employers, payers, and client personas.
2. Gather data on segment size, needs, and referral potential.
3. Prioritize segments based on strategic fit and revenue opportunity.

Outcome: A segmentation map guiding where to focus marketing efforts.

Appendix Reference: Appendix P, Market Segmentation Template

2. Perform Competitive Analysis

Why It Matters: Understanding competitors' strengths and gaps helps you differentiate and position your services effectively.

Process:

1. Select 3—5 local or online competitors.
2. Research their services, pricing, reputation, and marketing tactics.
3. Document findings in a competitor matrix.

Outcome: A clear picture of market gaps you can exploit and benchmarks for your positioning.



Appendix Reference: Appendix Q, Competitive Analysis Matrix

3. Define Your Value Proposition and Key Messages

Why It Matters: Consistent, concise messaging builds trust and clarity across every touchpoint.

Process:

1. Craft your unique impact statement in one sentence.
2. Develop three audience-specific messages (for clinicians, funders, and clients).
3. Test messages with a small group of stakeholders and refine.

Outcome: A messaging guide you can apply across your website, collateral, and outreach.

Appendix R: Appendix R, Messaging Guide Template

4. Build a Tactical Marketing Plan

Why It Matters: A detailed plan turns strategy into action – ensuring you execute consistently and can measure return on investment (ROI).

Process:

1. Choose 3-5 channels: digital ads, email campaigns, community events, partner outreach.
2. Allocate quarterly budgets and set targets (cost per lead, conversion rate).
3. Create a calendar with content themes, campaign dates, and responsible owners.
4. Track performance and optimize monthly.

Outcome: A living marketing roadmap with clear budgets, schedules, and metrics for success.

Appendix Reference: Appendix S, Tactical Marketing Plan Calendar

What's Next: Use this strategy to inform budget allocation, hire marketing support, and launch campaigns that fuel your growth targets.



Chapter 7: Implementation Guide and Timeline

Even the best plans falter without disciplined execution. This chapter provides a framework—through sprints, visual boards, and regular reviews—to keep your growth initiatives on track.

In Chapter 7, you will develop:

- **Sprint Plan:** Clear short-term milestones aligned with your strategy.
- **Visual Project Board:** Real-time task tracking and accountability.
- **Review Rhythm:** A structured cadence to monitor progress and adjust course.

1. Draft a 90-Day Action Plan

Why It Matters: Short, focused cycles maintain momentum and allow rapid learning.

Process:

1. Break your annual growth goals into 30-, 60-, and 90-day milestones.
2. Assign each milestone to an owner with clear deliverables.
3. Schedule sprint reviews at each phase end.

Outcome: A sprint plan that clarifies immediate priorities and ownership.

Appendix Reference: Appendix T, 90-Day Sprint Plan Template

2. Set Up a Project Board

Why It Matters: Visual progress tracking fosters accountability and transparency.

Process:

1. Choose a Kanban tool (Trello, Asana, Miro).
2. Create columns: To Do, In Progress, Done (add Backlog if needed).
3. Add tasks with owners and due dates; update status as work progresses.

Outcome: A living project board that everyone can reference.

Appendix Reference: Appendix U, Kanban Board Template



3. Schedule Regular Reviews

Why It Matters: Frequent check-ins catch issues early and reinforce commitment.

Process:

1. Hold monthly leadership huddles to review KPIs and project board.
2. Celebrate wins and surface challenges.
3. Decide on pivots or resource reassignments as needed.

Outcome: A documented review cadence that keeps your growth agenda alive.

Appendix Reference: Appendix V, Review Cadence Schedule

What's Next: Leverage these execution frameworks to launch pilot programs, scale service lines, and embed growth discipline into your culture.



Chapter 8: Additional Modules to Consider

Advanced Growth Modules

As your organization matures, you may want to layer in advanced capabilities. Consider these modules when you're ready:

- **Risk Management and Compliance:** Proactive policy reviews tied to business outcomes; consider using compliance software or external audits.
- **Outcome Measurement and Quality Improvement:** Link clinical metrics (patient health questionnaire [PHQ]-9 scores, readmission rates) to ROI; use business intelligence tools like Tableau.
- **Client Experience and Engagement:** Deploy satisfaction surveys and portal usability tests; partner with user experience (UX) consultants.
- **Technology and Innovation:** Explore telehealth expansions, data analytics platforms, or AI-driven intake tools.

Final Next Steps

1. **Customize and Localize:** Tailor each chapter in this guidebook with your data, names, and timelines.
2. **Pilot and Feedback:** Test one chapter's tools with a small team, gather feedback, and refine.
3. **Roll Out:** Introduce the full playbook at your next strategic planning retreat or leadership offsite.
4. **Iterate:** Schedule quarterly reviews to update and evolve the playbook as your organization grows.



Appendices

Below are ready-to-use templates. Copy each into its own document or spreadsheet and customize fields as needed.

Appendix A: Growth Statement Template

Element	Description	Your Input
Objective	Broad goal (e.g., expand service reach)	
Metric	Measurable target (e.g., % increase, new locations)	
Deadline	Specific date by which goal should be achieved	
Alignment	How this supports mission/vision	
Notes	Key assumptions or constraints	

Appendix B: Service Line and Capacity Mapping Worksheet

Service Line	Demand (1-5)	Margin (%)	Capacity Status (G/Y/R)	Notes
Outpatient Therapy				



Telehealth Sessions				
Group Workshops				
New Satellite Location				
Support Staff Roles				

Appendix C: SWOT Analysis Template

Strengths	Weaknesses
Opportunities	Threats

Top Priority:
• Strength: _____ • Weakness: _____ • Opportunity: _____ • Threat: _____



Appendix D: SWOT Guide

Facilitator's Guide: Conducting a SWOT Discussion

(Strengths, Weaknesses, Opportunities, Threats)

Purpose

A SWOT analysis helps teams quickly see what's working, what's not, and what outside factors matter. It's not about solving everything in the moment – it's about mapping the landscape.

Preparation

- **Time:** 60-90 minutes.
- **Materials:** Large paper/whiteboard or shared digital doc; sticky notes or markers.
- **Group Size:** 4-12 works best.

Steps to Facilitate

1. Frame the Session (5 minutes)

Explain:

- *Strengths* = what we do well, our assets.
- *Weaknesses* = where we struggle, gaps.
- *Opportunities* = outside trends, chances to grow.
- *Threats* = external risks, challenges.

2. Brainstorm Individually (10 minutes)

Each person writes ideas on sticky notes – one idea per note. This helps quieter voices be heard.

3. Share and Cluster (20 minutes)

As a group, place notes under the 4 categories. Combine duplicates, clarify wording.

4. Discuss and Probe (20-30 minutes)

Prompt with open questions:

- Strengths: "What are we proud of?"
- Weaknesses: "What slows us down?"
- Opportunities: "What trends or gaps could we use to our advantage?"
- Threats: "What external forces could harm us?"



5. Prioritize (15-20 minutes)

Ask participants to vote on the top 2-3 items in each category (dot voting works).

6. Wrap Up (5 minutes)

Summarize key takeaways. Remind group: this is a snapshot to inform strategy, not a final plan.

Tips for Success

- Keep the pace moving – avoid long debates.
- Encourage honesty, but focus on learning, not blaming.
- Capture everything visibly so all feel included.
- Frame purpose of the SWOT; clarify how information will be used and what participants can expect from the process.

Appendix E: Action Plan Worksheet

Priority Area	Objective (What)	Actions (How)	Timeline (When)	Owner (Who)	Status/Notes

Appendix F: Living Budget Dashboard Template (Excel)

1. **Tabs:** Actuals, Forecast, Scenarios
2. **Key Fields:** Date, Revenue, Expenses, Net Cash Flow, Cumulative Cash
3. **Scenario Toggles:** Volume Adjustment (%), Rate Adjustment (%)
4. **Visuals:** Line chart of Cash Balance; variance bar chart.



Appendix G: Financial Ratios Dashboard

Ratio	Formula	Target	Current Value	Status (OK/Alert)
Operating Margin	<i>(Revenue - Expenses) / Revenue</i>	>10%		
Days Receivables Outstanding	<i>Average AR balance / (Annual Sales/365)</i>	<45 days		
Burn Rate	<i>Monthly Net Cash Outflow</i>	TBD		

Appendix H: Break-Even Analysis Worksheet

Cost Type	Amount
Fixed Costs	
Variable Cost/Unit	
Price/Unit	

Break-Even Volume = Fixed Costs / (Price/Unit – Variable Cost/Unit)



Appendix I: Capacity Audit Matrix

Role/System	Skills (1-5)	Bandwidth (1-5)	Tools (Adequate/Gap)	Gap Priority (H/M/L)	Notes
<i>Clinician</i>					
<i>Scheduler</i>					
<i>EHR Platform</i>					

Appendix J: Technology Checklist

Platform	Functionality (1-5)	Integration (Y/N)	User Satisfaction (1-5)	Quick Wins/Upgrades
<i>EHR</i>				
<i>Scheduling System</i>				
<i>Billing Software</i>				



Appendix K: Partner and Vendor Scan Template

Partner/Vendor	Fit (1-5)	Capacity and Reputation	Integration Complexity (L/M/H)	Next Steps/Owner
<i>MAT Provider</i>				
<i>Housing Agency</i>				

Appendix L: Staffing Ratio Matrix Template

Service Line	FTE Clinicians	Support Staff FTE	Referral Coord. Hours	Supervisor Hours	Utilization (%)	Threshold Exceeded? (Y/N)
<i>Outpatient</i>						
<i>Telehealth</i>						



Appendix M: Communication Plan Template

Stakeholder Group	Message Summary	Channel	Timing/Frequency	Owner/Lead
<i>Clinicians</i>				
<i>Admin Staff</i>				
<i>Leadership</i>				

Appendix N: Change Champion Nomination Form

- **Nominee Name:** _____
- **Department/Role:** _____
- **Why They're a Good Fit:** (peer influence, expertise)
- **Expected Contribution:** (pilot, feedback, training)
- **Recognition Plan:** (how you'll acknowledge efforts)

Appendix O: Feedback Loop Survey Template

Weekly Pulse Survey

1. On a scale of 1–5, how clear are you on recent changes? _____
2. What barriers are you encountering? _____
3. What's working well? _____
4. Suggestions for improvement: _____
5. Additional comments: _____



Appendix P: Market Segmentation Template

Segment	Size (Clients/Refs)	Needs/Pain Points	Strategic Fit (H/M/L)	Next Steps
<i>Primary Care</i>				
<i>Schools</i>				

Appendix Q: Competitive Analysis Matrix

Competitor	Services Offered	Pricing Structure	Strengths	Gaps/Opportunities
<i>Competitor A</i>				
<i>Competitor B</i>				

Appendix R: Messaging Guide Template

Audience	Core Value Proposition	Key Message 1	Key Message 2	Key Message 3
<i>Clinicians</i>				
<i>Funders</i>				



Appendix S: Tactical Marketing Plan Calendar

Week/Month	Channel	Campaign/Theme	Budget	Owner	KPI Target
<i>April Week 1</i>	<i>Email</i>	<i>Referral Drive</i>	<i>\$500</i>	<i>Marketing A</i>	<i>50 new leads</i>
<i>April Week 2</i>	<i>Social Media</i>	<i>Telehealth Promo</i>	<i>\$300</i>	<i>Marketing B</i>	<i>20 inquiries</i>

Appendix T: 90-Day Sprint Plan Template

Milestone Period	Milestone Description	Owner	Deliverables	Review Date
<i>Days 1-30</i>				
<i>Days 31-60</i>				
<i>Days 61-90</i>				



Appendix U: Kanban Board Template

To Do	In Progress	Done
[] Task 1	[] Task 5	[] Task 9
[] Task 2	[] Task 6	[] Task 10
[] Task 3	[] Task 7	
[] Task 4	[] Task 8	

Appendix V: Review Cadence Schedule

Month	Leadership Huddle Date	KPI Review Focus	Decisions/Pivots
<i>January</i>	<i>Jan 15</i>	<i>Financial Ratios</i>	
<i>February</i>	<i>Feb 15</i>	<i>Service Utilization</i>	