

# StratzGroup LLC

*The Integrated Advisory Platform for Organizations Where the Stakes Are Institutional*

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## 1 The Problem StratzGroup Was Built to Solve

*The organizations most at risk in the mission-driven sector are not the ones that are failing. They are the ones that have succeeded — and built institutional relationships, capital pipelines, and stakeholder obligations that their governance and structural infrastructure cannot yet support.*

This condition is the Failure of Success™: the structural gap between an organization's external complexity — funder expectations, capital transaction requirements, governance obligations, evidence standards — and the internal architecture built to absorb it. It is not a leadership failure. It is not a strategy failure. It is a structural problem, and structural problems require a specific kind of response that neither legal counsel, strategic consultants, nor capacity builders are positioned to deliver.

StratzGroup was built to deliver that response. Across two integrated practice tracks — ImpactStratz for mission-driven organizations and AlphaStratz for private equity deal teams — StratzGroup occupies the pre-legal, cross-domain structural advisory layer that no single-profession practice can occupy.

17,000+	\$4.2B	35–45%	\$77M+
Registered nonprofits in Chicagoland — the addressable practice market	Philanthropic infrastructure actively shifting to evidence-based allocation	Nonprofit capital raises \$250K–\$5M that stall for structural reasons, independent of organizational merit	Documented value created by Ralph Kindred across Gartner, Slalom (\$0→\$38M+), Atos/Eviden, Federal Reserve Bank of SF, and DeVry University

*Figure 1. Market and practitioner context. Market figures are practitioner-synthesized estimates grounded in StratzGroup advisory practice and publicly available Chicagoland sector data. The \$77M+ figure spans employer-verifiable value creation events; it is not audited. The 35–45% stall rate is a directional estimate from observed practice patterns, not a published research finding.*

## 2 Two Practice Tracks, One Diagnostic Foundation

StratzGroup operates two complementary practice tracks that share a common diagnostic methodology — the Failure of Success framework, the ImpactQoE evidence standard, and the Anti-UPL operating discipline — but serve distinct client segments with distinct service architectures.

IMPACTSTRATZ	ALPHASTRATZ
<p><b>Mission-Driven Structural Advisory</b> For nonprofits, social enterprises, hybrid ventures, and values-aligned organizations navigating governance complexity, capital transactions, and evidence infrastructure gaps.</p> <p><b>Services:</b></p> <ul style="list-style-type: none"> <li>• Structural Readiness Sprint™ — Fixed-scope 3-week diagnostic (\$8,500–\$12,000)</li> <li>• VentureReady™ Architecture — Hybrid venture design via the DMMV Convergent Canvas™</li> <li>• ImpactQoE™ Evidence Infrastructure — Impact claim scoring and evidence quality build</li> <li>• Portfolio Readiness Assessment — For foundations and CDFIs across active grantee/borrower portfolios</li> <li>• PLQF-U™ Government Fiscal Architecture — State and local government advisory</li> </ul> <p><b>Channel Partners:</b> Foundations · CDFIs · Accelerators · University Social Enterprise Programs</p>	<p><b>Private Equity Technical Advisory</b> For PE deal teams performing technology, regulatory, and requirements due diligence on healthcare IT, govtech, and enterprise software targets — Chicagoland focus.</p> <p><b>Services:</b></p> <ul style="list-style-type: none"> <li>• TechQoE™ — Technology Quality of Earnings: tech stack, architecture, and debt assessment</li> <li>• RegQoE™ — Regulatory Quality of Earnings: compliance posture, enforcement risk, OBBBA/HIPAA/HITECH</li> <li>• ReqQoE™ — Requirements Quality of Earnings: contract integrity, scope creep exposure, delivery risk</li> <li>• MVTRR™ Kill House — Most Valuable Target Risk Register for platform acquisition diligence</li> <li>• Master Underwriting OS™ — Eight-tool Excel-based underwriting system</li> </ul> <p><b>Target PE Firms:</b> Linden Capital · Water Street Healthcare · Shore Capital · Chicagoland mid-market</p>

Table 2. StratzGroup dual-practice architecture. Both tracks share the Failure of Success diagnostic foundation and the Anti-UPL operating discipline.

### 3 The Structural Readiness Sprint™ — Primary Entry Product

The Structural Readiness Sprint is StratzGroup's Tier 1 entry engagement for the ImpactStratz practice. It is a fixed-scope, fixed-fee, three-week diagnostic that produces a board-ready structural findings report. Fixed scope is the product's primary commercial advantage: before signing, clients know exactly what is being assessed, what will be delivered, and what it costs.

SPRINT COMPONENT	WHAT IT COVERS	WHAT THE CLIENT RECEIVES
Seven-Domain Evidence Inventory	55-item document review across Governance Architecture, Entity & Structural Clarity, Intellectual Property, Financial Structure, Capital & Funding, Impact Evidence Infrastructure, and Human Concentration & Succession	Complete evidence inventory: verified items, absent items, and the structural implications of each absence pattern
Four Structured Interviews	Executive Director (60–75 min), Board Chair (45–60 min), CFO (45–60 min), Program Lead (45 min) — all conducted personally by Ralph Kindred	Discrepancy analysis between leadership perceptions; structured Counsel Bridge item catalog built from interview findings
ImpactQoE™ Evidence Scoring	Every primary impact claim scored against the Evidence Quality Scorecard (L1 system-generated → L4 narrative	Impact claim disposition list: what can go into institutional funder presentations, and what must be rebuilt before use

SPRINT COMPONENT	WHAT IT COVERS	WHAT THE CLIENT RECEIVES
	assertion); Publish / Strengthen / Quarantine disposition per claim	
Capital Transaction Readiness Analysis	Entity structure fit with intended instrument; governance authority documentation; financial reporting readiness; specific prerequisite gap list	Transaction readiness rating — Ready / Remediable in 60 Days / Requires Structural Redesign — with specific action for each gap
90-Day Action Plan	Board-assignable remediation actions with priority, domain, owner, and date; organized for direct board presentation and tracking	A working governance document designed to be adopted as a board resolution and tracked at subsequent meetings — not a slide deck
Counsel Bridge Question Pack	Every legal-adjacent item (entity structure, tax classification, IP enforceability, securities, governance authority) organized by matter type for efficient counsel engagement	A structured brief the client takes to their attorney: specific questions, business context documented, matter types organized — reduces attorney discovery billing

*Table 3. Structural Readiness Sprint™ component breakdown. Fixed fee: \$8,500–\$12,000. Duration: 10–17 business days from signed agreement and document submission. What is not in scope: legal advice, financial audits, strategic planning, technology implementation, and ongoing management advisory. These are routed to qualified professionals via the Counsel Bridge protocol.*

## 4 The Engagement Pathway

The Sprint is the entry point for every ImpactStratz engagement. Each tier produces findings that make the next tier more precise — the diagnostic work at each stage identifies and prioritizes exactly what the next stage will address. No client is required to proceed beyond the current tier, and no commitment beyond the current engagement is expected.

TIER	ENGAGEMENT	SCOPE	INVESTMENT	WHO IT'S FOR
1	Structural Readiness Sprint™	Fixed-scope 3-week diagnostic: 7-domain evidence inventory, 4 interviews, ImpactQoE scoring, capital readiness, 90-day action plan, Counsel Bridge packet	<b>\$8,500–\$12,000 fixed fee</b>	Organizations approaching capital events, governance transitions, or institutional partnerships within 90–180 days
2	VentureReady™ Architecture	Hybrid venture design using the DMMV Convergent Canvas™: dual-mission KPI architecture, entity separation design, governance authority structure, impact-to-commercial translation	<b>\$25,000–\$40,000</b>	Organizations whose Sprint findings confirm a need for structural redesign, not just gap remediation
3	ImpactQoE™ Build	Full evidence infrastructure build: data collection system design, claim rebuild to L1/L2 standard, funder-ready impact	<b>\$40,000–\$75,000</b>	Organizations with Sprint findings showing multiple quarantine-level claims and insufficient evidence infrastructure

		reporting template, annual evidence quality review		
4	Integrated Engagement	Full-stack structural advisory: Sprint → Architecture → Evidence Build → ongoing governance advisory retainer; designed for active capital transactions requiring simultaneous work across all four domains	<b>\$75,000–\$250,000+</b>	Organizations in active capital transactions requiring sustained advisory across governance, entity, evidence, and capital readiness simultaneously

Table 4. StratzGroup engagement pathway. Tier progression is driven by Sprint findings, not by practitioner recommendation independent of diagnostic results.

## 5 Practitioner Credentials

StratzGroup is a practitioner-led firm. Every engagement — interviews, analysis, report, board readout — is delivered personally by Ralph Kindred. Work is not delegated to junior analysts or subcontractors. The practitioner who conducts the interviews writes the report and presents the findings to the board.

CREDENTIAL	WHY IT MATTERS FOR THIS WORK
J.D., University of the Pacific	Legal literacy across entity structure, IP ownership, governance authority, and contract analysis — without crossing into legal advice. The credential that makes the Counsel Bridge protocol precise rather than generic.
MBA, University of San Francisco	Financial underwriting fluency — the basis for the Quality of Earnings methodology applied to both impact evidence (ImpactQoE™) and PE due diligence (TechQoE™, RegQoE™, ReqQoE™).
TOGAF 9 Enterprise Architect	Enterprise architecture discipline applied to organizational design — the basis for the DMMV Convergent Canvas™ and the hybrid venture architecture methodology.
Gartner Executive Partner — 30+ State CIO relationships	Institutional relationship intelligence across government, nonprofit, and enterprise sectors — the context for PLQF-U™ government advisory and the regulatory landscape in RegQoE™.
Slalom — \$0 to \$38M+ practice build	Demonstrated capability to build and scale an advisory practice from zero to institutional revenue — the practitioner proof behind growth-stage advisory positioning.
Atos/Eviden VP, State & Local Government — \$25M+ revenue	Execution-level SLED market experience — the operational foundation for SLEDMATTERS fractional sales leadership and PLQF-U™ government advisory.
Federal Reserve Bank of San Francisco	AI governance and digital transformation in a regulated institutional context — the practitioner experience behind the regulatory risk frameworks in RegQoE™ and PLQF-U™.
DeVry University CIO	Enterprise IT leadership and organizational transformation at institutional scale — the operational context for technology architecture assessment in TechQoE™.

Table 5. Practitioner credential stack. StratzGroup is a business advisory firm. These credentials confer legal literacy, financial fluency, and enterprise architecture discipline — not legal practice authority, CPA certification, or registered investment advisory status. Every engagement operates within these boundaries. Legal-adjacent items are routed to qualified counsel. Financial certification is not performed.

## 6 Who StratzGroup Serves Best

Not every organization is the right fit for StratzGroup. The diagnostic is most valuable to organizations that meet at least two of the following four conditions at the same time:

	CONDITION	WHAT IT INDICATES
0 1	A capital event is active or approaching within 90–180 days	A grant renewal, CDFI loan, PRI, impact investment, or commercial partnership is in the pipeline — and structural gaps could prevent it from closing or create material post-closing liability
0 2	Funder or board expectations are outpacing organizational response capacity	Institutional stakeholders are asking for things the organization cannot produce on the expected timeline — evidence quality, governance documentation, entity clarity
0 3	Earned revenue or commercial activity has begun without formal governance architecture	UBIT exposure is unanalyzed, entity separation is undocumented, commercial authority boundaries are informal — the commercial success is creating structural risk that has not been named
0 4	The organization is planning a hybrid structure transition, entity separation, or governance redesign	The architecture question is live — but the organization does not yet have the structural diagnostic that tells it what specifically needs to be designed, and in what sequence

Table 6. Client fit conditions.

**START WITH A 20-MINUTE DIAGNOSTIC CONVERSATION — NOT A COMMITMENT**  
*The diagnostic conversation determines whether the Failure of Success pattern describes your organization's current situation. If it does, we will identify precisely which structural gaps are active and what it takes to resolve them. If it does not, we will tell you that too.*  
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