SUNSTONE MANAGEMENT ADVISORS

GUIDING HEALTHCARE LEADERS THROUGH STORMY MARKETS AND CHANGING TIDES

Welcome to the June 2026 edition of The Helm, Sunstone's executive briefing for Healthcare and Insurance leaders navigating growth, transformation, and scale. Each month, our Operating Partners share real-world insights from complex engagements to help leadership teams see beyond the horizon and build the capabilities required to turn opportunity into sustained results.

Like the ancient Vikings who used the Sunstone to find their path, we are ready to help you plot your direction and chart a course to become Extraordinary.

Headwinds & Currents

Many organizations have legacy oversight functions designed to monitor compliance, manage contractual obligations, and respond to issues. Those still matter, but Leaders today need to answer more strategic questions:

- Which service provider relationships matter to growth, brand, and customer experience?
- Which risks deserve attention?
- Which oversight activities create value?
- Are there operational signals pointing towards improvement opportunities?
- Are technology investments producing the right insights and return?

Legacy oversight structures may not be up to the new challenge. Common issues include:

- Siloed and overlapping workflows
- Fragmented and episodic reporting
- Oversight procedures that do not match the risk profile of the function being reviewed

It is more than a compliance problem; it's an alignment issue that can mask mission-critical developments.

This month, we share a client voyage focused on moving from static oversight to dynamic governance: aligning value, operational risk, customer experience, reporting, technology, and resource intensity.

SMA Client Voyage

The Client's Storm

The professional services subsidiary of a national membership organization was responsible for overseeing a complex portfolio of relationships with healthcare and financial services providers. The team had deep institutional knowledge, strong commitment to customer stakeholders, and a long history of protecting the enterprise brand.

But the business changed. Leadership was placing a greater emphasis on growth, customer experience, efficiency, and risk management. The legacy model had been in place for more than a decade with limited change to workflows, planning, reporting, or technology. While effective in supporting the original mission, it was using an operating structure that was impacting service provider satisfaction and limiting growth opportunities. To take on the new paradigm, certain challenges needed to be addressed:

- Oversight was inconsistent and not tied to priorities
- Teams operated in silos, limiting a shared view of performance
- Oversight was applied uniformly, regardless of value creation
- Reporting, while voluminous, wasn’t actionable
- Front-line learnings were not converted into improvements
- Technology was costly, fragmented, and underutilized

The organization had the talent to meet its new challenge, but a refresh in approach was in order.

Viewing Through the Sunstone

Sunstone completed an assessment of the entire oversight function. We examined stakeholder needs (service providers, 3rd party vendors, customers), workflows, reporting, technology, and costs. We asked four practical questions:

- How important is the service provider relationship to growth, brand, and customer experience?
- What situational attributes are driving risk?
- What oversight tactics are best suited to address those risks?
- How much intensity should be applied based on value, risk, and existing controls?

This created a structure for connecting risk analysis, capability selection, and oversight intensity. Technology was evaluated not only to reduce costs but also to determine which platforms delivered the best ROI.

We clarified how oversight should evolve, creating a new dynamic analytics model for leaders to see emerging trends, assess improvement opportunities, and determine where to focus.

Signals

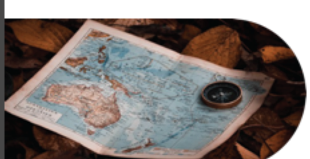
Reduced technology cost of ownership by 40%	**Improved service provider satisfaction and reduced barriers to growth**	**Removed 10+ duplicative workflows**	**Aligned oversight intensity to value and risk**

Dynamic ERM governance helps leaders understand where to focus, what to change, and how to create value.

Compass Points

- Start with the current business priorities, not the legacy workflows
- Segment stakeholder relationships by strategic importance
- Use structured risk analysis for prioritization
- Match oversight tactics to the specific risks being managed
- Shift reporting from completed activities to actionable insights
- Evaluate technology based on function and return on investment

Set Your Heading



ERM Governance models continually evolve. To begin the journey, ask:

- Do we apply the same oversight of functions regardless of different levels of risk?
- Do our workflows help identify, escalate, and act on the right issues?
- Do our reports just say what happened, rather than why and what to do next?
- Are stakeholder insights being converted into measurable improvements?

- Is our technology cost-effective, and does it support better decisions?
- Do our resources match the risks that matter most?

The goal is not more oversight, but one that helps the organization focus its resources, improve stakeholder collaboration, strengthen customer experience, and turn insight into action.

Book a Complimentary Voyage Briefing

If our perspectives on growth, transformation, and value creation resonate with you, let’s schedule a brief introductory call. We’ll listen, learn, and explore how our paths might align—no obligations, just dialogue.

Are You Ready to Be Extraordinary... To Go Beyond...?

www.sunstonemanagementadvisors.com