

COMPANION DOCUMENT

The Case Framework

How Curated View approaches a project

Every engagement follows the same underlying logic: observe the system as it is, identify where coherence is missing, and build structure at the points of greatest leverage.

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CASE FRAMEWORK

The Lens

How we see a business before we touch anything.

Before any restructuring begins, Curated View approaches a business as a system—not as a collection of problems to solve. This distinction matters. Problems invite patches. Systems invite understanding.

The first question is never “what’s broken?” It is “how does this move?” How does information enter the system? Where does it go? Where does it stop? Where does it double back? Who touches it and when? What triggers the next step, and is that trigger reliable or manual?

The lens is systemic, not symptomatic. We are not looking for what went wrong. We are looking for what the system is doing—and whether it knows it’s doing it.

Three Layers of Observation

Every business is observed through three layers, regardless of size, industry, or complexity:

Flow. How does work, data, and communication move through the system? Where does movement stop, loop, or require manual intervention?

Connection. Which parts of the system are aware of each other? Which tools share data automatically, and which require a person to bridge them?

Coherence. Does the system feel like one thing? Does the client experience match the backend reality? Does the brand promise align with the operational capacity to deliver?

These are not checklists. They are perspectives. Each one reveals a different kind of friction—and together, they produce a complete picture of where the system needs attention.

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The Logic

How observation becomes intervention.

From Structural Reading to Action

Once the system has been observed and mapped, the restructuring follows a specific logic. Not every project requires every step. But the sequence is consistent:

- 1. Identify friction points.**
Where is time, effort, or information being lost? These are the points of highest leverage—small changes here produce outsized results across the system.
- 2. Trace root cause.**
A symptom in one part of the system often originates in another. A client communication issue may trace back to a workflow gap. A data problem may trace back to a missing integration. We follow the thread backward before designing forward.
- 3. Design the restructure.**
The new structure is designed to resolve the root cause, not the symptom. It respects what's working and only changes what needs to change. The goal is minimum viable restructure—the smallest set of changes that produce the most coherence.
- 4. Implement directly.**
The restructure is built into the client's actual systems—workflows, integrations, automations—not presented as a recommendation.
- 5. Document and hand off.**
Everything that was changed is documented: what it was, what it is now, and why. The client receives a system they can understand and maintain without dependency on us.

CASE FRAMEWORK

The Layers

How every engagement contributes to something larger.

No engagement exists in isolation. Every project produces knowledge that extends beyond the specific client context. To ensure this knowledge is captured and usable, every engagement's output is processed through three layers:

1. Client-Specific.

The direct deliverable. Private and scoped. Includes the structural reading, restructured workflows, integrations, automations, and handoff documentation. This belongs to the client.

2. Abstracted Pattern.

The underlying structure, separated from client-specific details. What type of friction was this? What kind of system produced it? What restructuring pattern resolved it? This is archived internally and becomes reference material for future work.

3. Conceptual Integration.

The deepest layer. How does this pattern connect to broader frameworks about how systems operate? What does this engagement reveal about the nature of structure, alignment, or coherence in general? This layer feeds the thinking that informs everything.

This means every project—regardless of scale—contributes to a growing body of structural understanding. The work gets sharper over time because the patterns compound.

Because these observations contribute to an ongoing research methodology, every engagement includes informed consent. Clients are made aware of how anonymized structural patterns are captured and used—and no identifiable details ever enter the research archive without explicit, separate permission.

The logic behind this layered processing reflects a broader conviction: that applied work and deeper understanding are not separate activities. Each one strengthens the other. The framework exists to ensure that connection is never lost.