

Rebuilding Leadership 'From The Inside Out': The Project Transition Case Study

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1PM

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Creating Your High-Performance Leadership Team



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 **PROJECT TRANSITION**
HOPE AND HEALING THROUGH COMMUNITY

 **PCS**
MENTAL HEALTH, LLC



Recognize the Need

Identify Current Status

There are many reasons why you would decide to make a change to executive leadership. Tom mentioned a few
In our case we were **not getting the outcomes that were intended** when resourcing the team in place at that time

- Silos – lack of team cohesion

In addition, our **Organization is growing**

- There are levels to an Organization's development
- We needed to “Level Up” to address the specific needs of our Members (our term for our Patients/Clients), our Payors and the States we serve
- The in-place team at that time could not “Level Up”

For purposes of our discussion together please consider a **two- pronged approach** to making this change

- Planning and Design
- Implementation and Ongoing Operations

I will present Planning and Design and Dr. Stacey Dixon will present how to Implement and Operate this type of change



Reacquaint Yourself With Key Players

Reacquaint Yourself With Your Customers

Consider beginning the process with a thorough re-acquaintance with your Customer

- Define customer broadly
- Consider all Stakeholders' perspectives
- Know your “Decision-Makers” and know your “Decision-Influencers”
- Know your customer as a Person, not just a business partner

“Geek Out” on your customer – there is no downside

- For us, our primary customers are all of the Persons who represent the Top 3% most complex, most challenging of any Health Plan
- All of the stakeholders in their lives, family or trusted Champion, the insurance companies, the States, the Advocacy community, many others

Identify **one unifying Core Value** that best aligns to the optimum outcome for your customers, and best aligns with your personal belief system and personal core values

- For us, this is being truly “**other-regarding**”, truly caring and working hard to achieve your customer’s “Blue Sky”- what they want
 - Person-Centered
 - Radical Acceptance
 - Meet the Person where she is at

Identifying and onboarding all resources, including people and leaders, that share this trait, is non-negotiable. It’s what you do for a living

- It is infused in everything we do
 - Accounting example
 - You will see this in Dr. Dixon’s work

Reacquaint Yourself with YOU

You have the Privilege of bringing about the most consequential change in your Organization – this is an awesome responsibility
Everyone forgets about the Leader. There is only one you, you are accountable, so you need to know yourself in order to identify the resources you need to put in place

- Lots of good resources to guide you in this process
- What do you really enjoy the most?
- What are you especially “good” at?
- What do you like less than your favorite?
- Where are you less than your strongest?

Identify your “gaps” or areas in your overall leadership where you have less than optimum enjoyment and/or less than optimum performance

- Reframe the “gap” as an “invitation to partnership”

In our case, I looked at data since 2010 and saw patterns. I unwittingly had been a “limiting factor” on the growth of our company by not being excellent at the day-to-day operations of our programs

- Operations, on the whole, was a deficiency



Determine the Path

Determine the High-Level Path for Your Organization

Organizations evolve and new opportunities present themselves

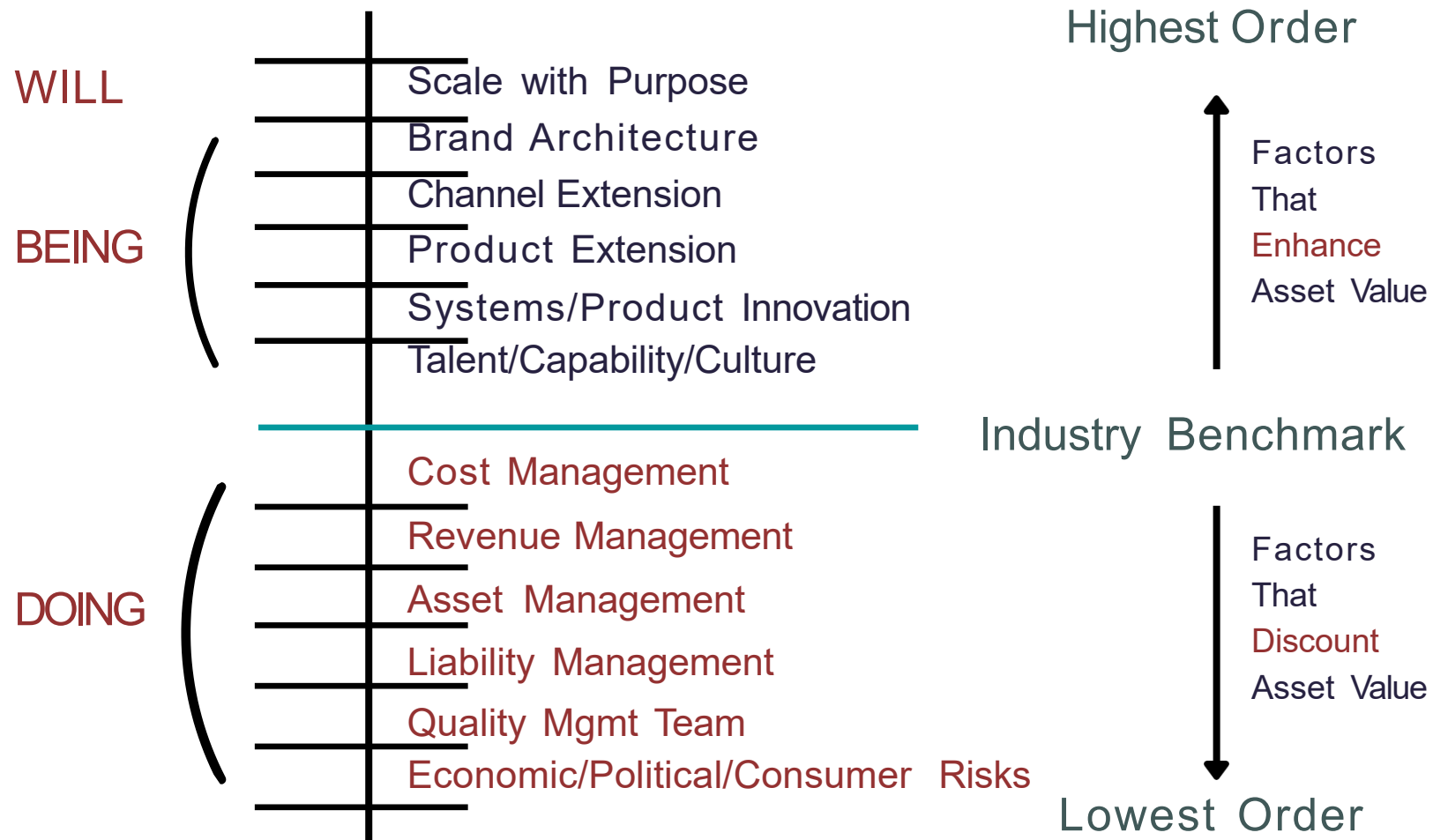
Agree on a 5-year Plan for the Organization with your Partner(s) who represent strength in your areas of deficiency

- You need he/she/they at the table
- Consider each Product as its own P&L and how to optimize each one
- Define where we wanted to land at the end of 5 years in terms of Enterprise Value
- Agree on very clear, simple measurement of the overall performance
- Back into annual Targets from your destination back to current

Consider an expert in mindset, communication and alignment to ensure that everyone stays on the same page of the 5 year Plan

- Allow him/her to have unfettered access to your Executive Team and all leaders in the company
- Align him/her/they with your Operations Leader to ensure everyone stays in sync
- Dr. Dixon will go through in detail how she attained a very high level of alignment

VALUATION CONSIDERATIONS



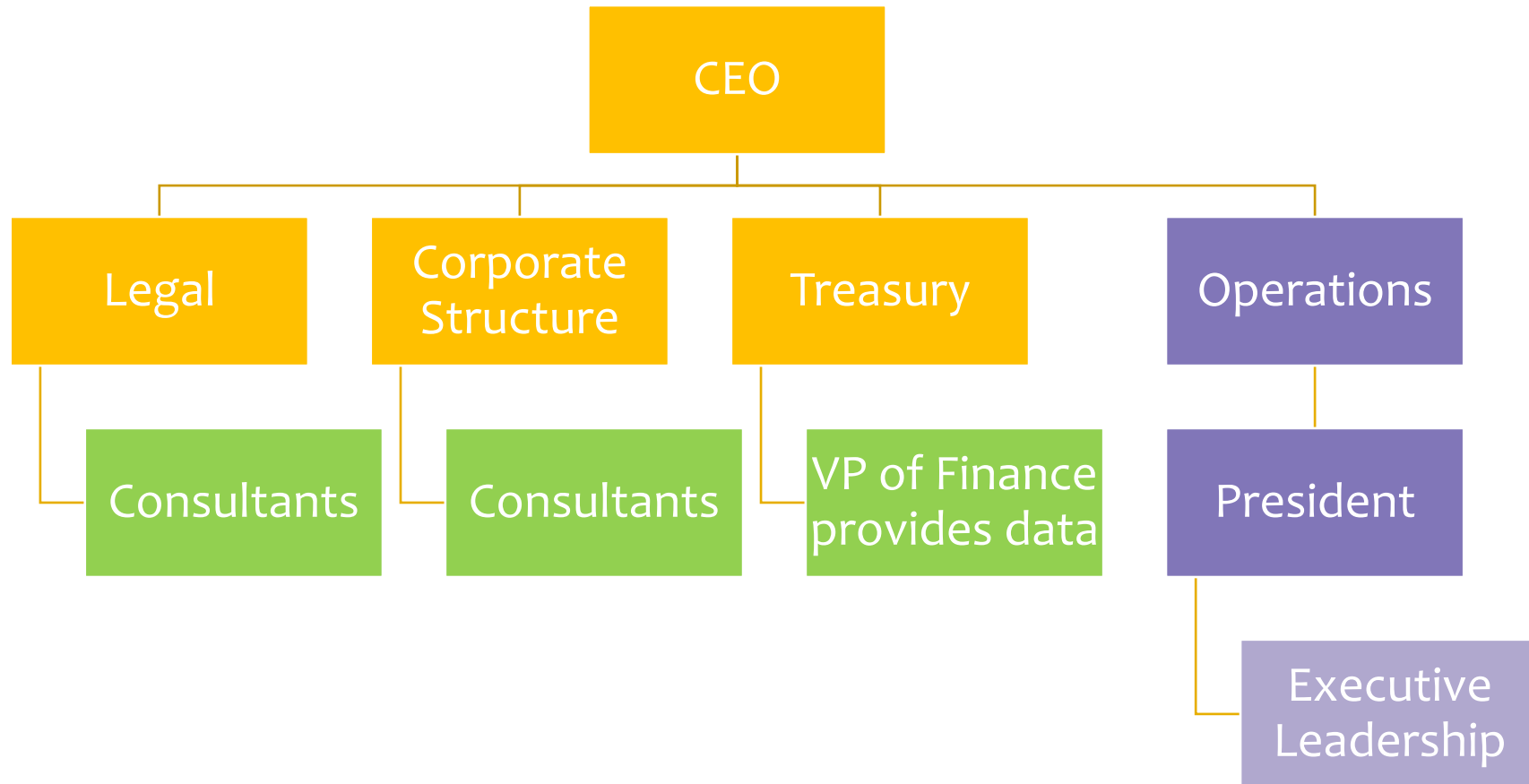


Onboard Your Partner

Onboard Your Partner

Assess her/his/their alignment philosophically and morally with the agreed upon 5 year Plan for the Organization

- If it is high, consider an Employment Agreement that is highly collaborative, Partner-Friendly, and completely driven by the agreed-upon 5 year Plan
- Consider the 5 year Plan to be the “Contract” that you and your Partner have agreed upon
- ENSURE that your Partner’s total compensation directionally mirrors your total compensation and the minimum goals of the 5 year Plan
 - No one is in this line of work for the money
 - When the Organization is successful the people that created that success should participate in that success
- ENSURE that your Partner is always appropriately resourced to be successful, even if she or he or they are unaware of a resource obstacle





Use Questions to Guide Decisions

Define the WHY

Before embarking on “the change,” do a **rapid assessment** of where the company is in terms of:

- Leadership (voids, errors, successes)
- Customer relationships (members/clients, payors)
- Staff relationships (trust, clear sense of direction/purpose, desire to do what is right)
- Financials (balance sheet, self-funded vs other-funded growth plans)
- Operations (what’s working/not working, quality & compliance, staff understanding of what to do)

Identify **the WHY** for yourself, for your team:

- Why am I HERE, at this company, at this point in my career? Why did I choose this?
- Why have good people and future leaders stayed here? What are their hopes/dreams for this place?

Clarify the **Core Values** to speak to the WHY, and keep it simple:

- What sets us apart from competitors?
- What do we do best? Or want to do best?



CORE VALUES

Our Core Values

“Accepting who you are, supporting you to get where you want to be”

- **Radical Acceptance**
- **Person-Centered Support**
- **Community**

With Supporting Values:

- Belonging
- Valuing One Another
- Relationship

Align Staff Expectations With Core Values

Staff who align with the Core Values will rise. Those who don't must leave – this is a **moral responsibility** you have to the company, its values, the high performers, and to your members/clients.

Guiding questions:

- Who is working in the company's best interests vs their own? (Obviously, there should be a balance, but some people make it clear that it is all about “me” vs “thee”)
- Who has the 3 necessary traits for leadership? (NOTE: All 3 must be present in a high performer)
 - Who “gets it?” These are the people who live, breathe, and speak the Core Values. They understand their role in delivering on the Core Values.
 - Who “wants it?” These are the people who want to achieve our purpose, and they align their immediate career goals to do so.
 - Who “can do it?” These are the people who have the skills to put the Core Values into decisions and actions.

Align KPIs, salaries, and incentives to reward those who are collaborating toward our purpose and Core Values



Make Room at the Table

Define the Team and Chart the Course Ahead

Define what a high-performing team looks/sounds/feels like

- Set ground rules and expectations for behavior – let your Core Values lead you
- Allow discussion of what we don't want, mistakes of the past – these are learning opportunities, so don't shut this conversation down too quickly
- Value and model transparency as much as possible
- Charge your team with holding YOU accountable – and thank them when they do
- Recognize and value divergent thinking
- If needed, President collaborates with CEO on what the team will deliver

Ask: What voices do I need at the table? Where are my blind spots?

- Make room for leaders to “own” and to present their expertise, their projects – both internally and externally
- Elevate and challenge your quieter leaders – “I need you”
- Build in “three deep” overlapping layers of expertise – leave no area without coverage if a leader steps away
- Ensure the voice of the customer is represented

Clarify Roles

LARCI – Liable, Accountable, Responsible, Contributing, Informed

- Defines structure
- Implementation is highly collaborative

A=Accountable R=Responsible C=Contributor I=Informed L = Liability	Culture Brand Architecture	Leadership Hiring	Introduce Young Adult Programming	Program Expansion (new programs)	Payor Relations	Training	Development of PT in a Box	Real Estate	Strategic Planning	Tactical Planning (budget)
CEO	L	L	L	L	L	L	L	L	L	L
President	A	AR	A	A	A	A	A	A	AR	A
VP of Clinical and Operations	C	C	R	C	C	C	R	C	C	C
VP of HR	R	C	I	C	C	R	C	I	C	C
VP of Finance	C			C	C	C	C	C	C	R
VP of Outcomes and Systems Development	C		I	I	C	C	C	R	C	C
VP of Development	C	C	I	R	R	C	C	C	C	C
Senior Director of Outreach and Admissions	C		I	C	C	C	C	I	C	C



Measure & Incentivize the Right Things

Measure and Incentivize

Annual Strategic Planning

- 3-5 company goals for next FY
- Shared goals with 3-deep overlap
- Quarterly “Rocks” for each person on the team
 - Customer
 - Staff
 - Finance
 - Operations

Stacey Dixon Q3 '24 Rocks

- Staff
 - Deferred Comp
 - Bonus Structure for 2025
- Customers
 - Roll out annual core values training
- Operations
 - Individualizing Treatment/Transition Plans
- Finance
 - Clarify accounts

Bonus/Incentives

- What are do we want to incentivize?
 - Individual performance – through Merit Increases
 - Team performance – through quarterly/annual Bonus
 - Reaching company goal(s)
 - Reaching team/program/department goals

The Leap Model

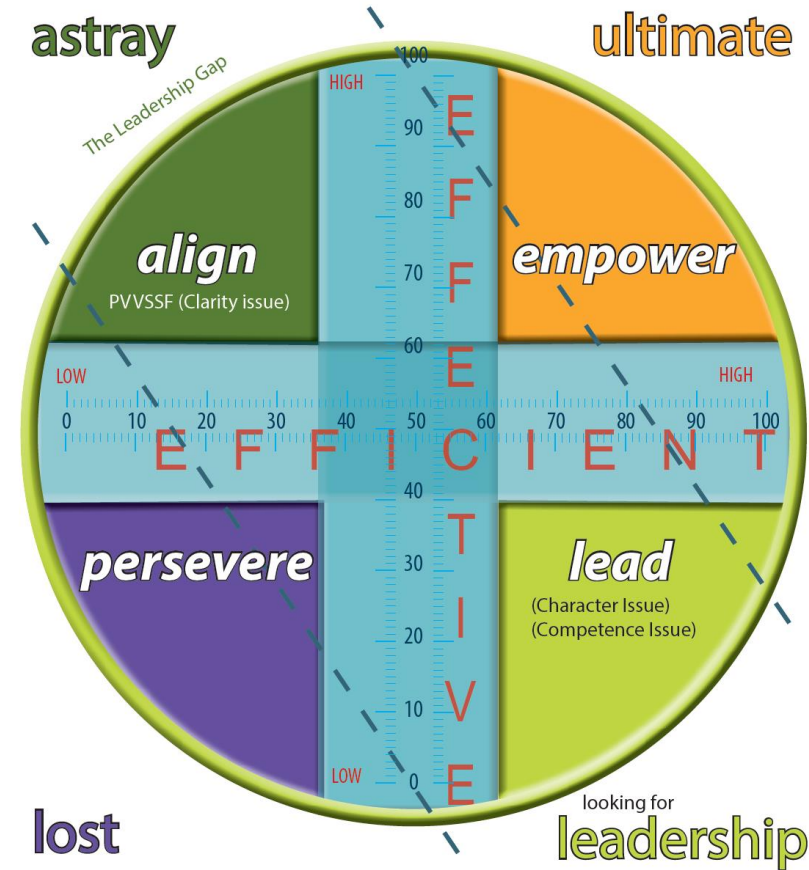
Quarterly Checks

SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

PESTLE Analysis – Political, Economic, Scientific, Technological, Legal, Environmental

LEAP – Effective & Efficient Teams

Team Performance Stage (next slide)



Source: Dick Ruhe
Adapted: Seven Edge Success/Wouters

Real Team

The real team is a diverse number of people with complementary skills who are equally committed to a common purpose, goals, and working approach, for which they hold themselves mutually accountable.

High Performance Team

This is a group that meets all the conditions of real teams, but its members are also deeply committed to each other's personal growth and success. That commitment usually transcends the team. The high performance team significantly outperforms all other like teams, and outperforms all reasonable expectations given its membership.

SUMMARY





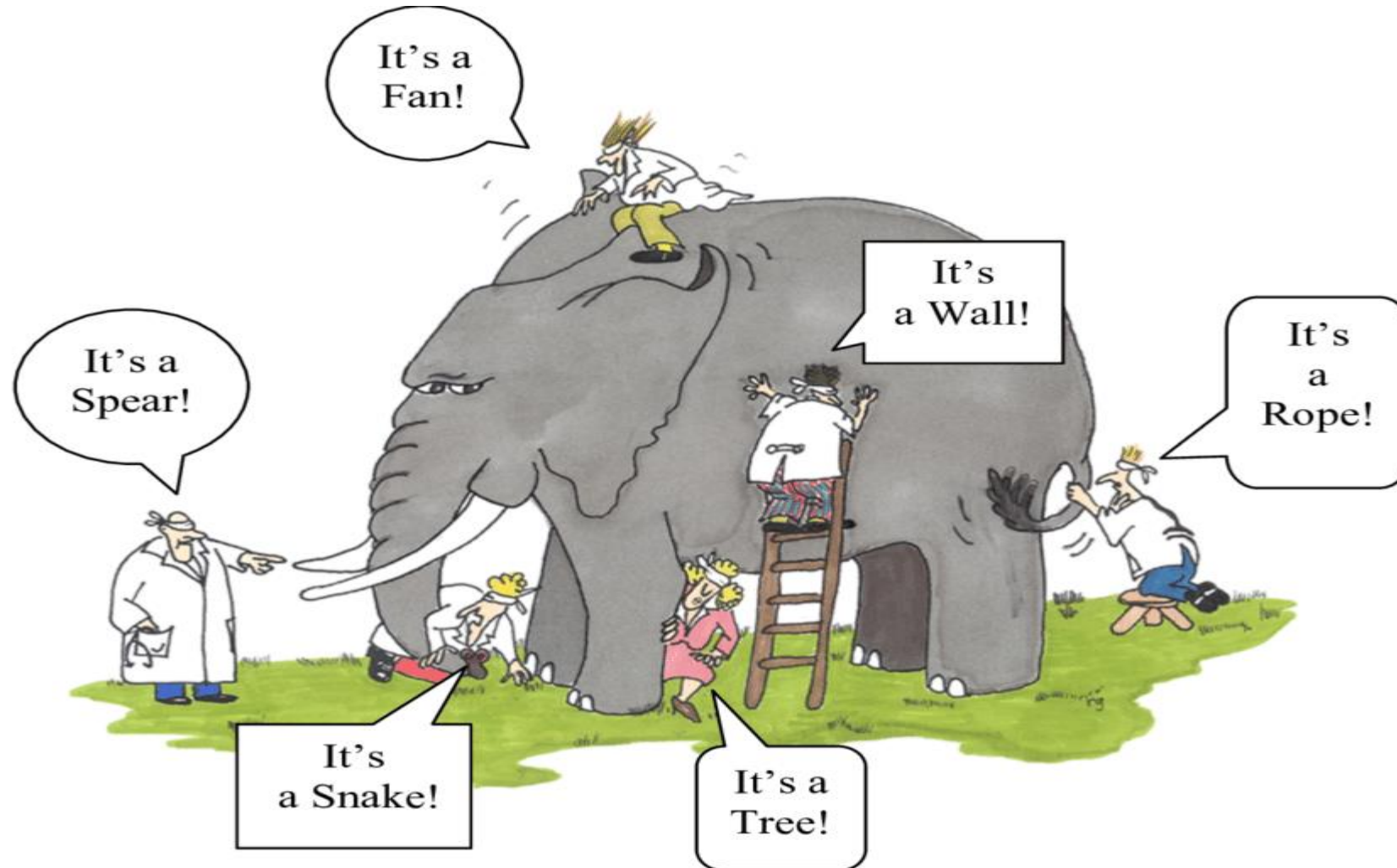
Nurture Growth

Plan for Replication and Sustainability

To sustain a high performing team (and replicate successes), you must plan for and nurture them. Some methods we use:

- Daily Huddles – stay connected, identify and respond to issues quickly, celebrate mini-successes on the spot
- Weekly Executive Leadership Meeting– review rocks, focus on strategic goals, problem-solve, inform
- Quarterly Rocks Reviews – time for assessing progress, setting next quarter’s rocks, course-correcting
- Annual Budget Process – transparent, all departments take part, document the process and the “why” decisions were made
- Retreats – Senior Leadership takes part with regional programs, time to inform, problem-solve, focus on goals
- Leadership Coaching – continuous (individual and in teams)
- Career Path Development and Succession Planning – be as transparent as possible
- Keep “Lessons Learned” Document(s)

The Elephant in the Room



Replicate High Performing Teams at Program Level

Senior Leaders defined High Performance from their piece of the elephant

Developed Report Cards

Quarterly High Performing Teams Review

- Each Program Director meets with Senior Leadership to review data and qualitative feedback
- Program Directors identify needs for support
- Program Directors give Senior Leadership feedback about our leadership

QUESTIONS?





Thank You

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