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

October 9, 2025 | 1:00 pm ET

Note: *The following text was transcribed using an automated service. Any misspellings and typos are a result of the service as the transcription has not been reviewed.*

00:00:01.940 --> 00:00:04.585
Welcome to today's Circle, executive Round Table

2
00:00:05.505 --> 00:00:07.305
Rebuilding Leadership from the Inside Out,

3
00:00:07.325 --> 00:00:09.185
the Project Transition case study.

4
00:00:09.535 --> 00:00:11.105
Today's featured speaker is Dr.

5
00:00:11.115 --> 00:00:14.545
Stacy Dixon, president for Project Transition. Luke Crab.

6
00:00:15.165 --> 00:00:16.785
Uh, Crabtree could not make it today.

7
00:00:17.045 --> 00:00:18.465
Before I hand it over, I have a couple

8
00:00:18.465 --> 00:00:19.585
of housekeeping reminders.

9
00:00:19.585 --> 00:00:21.185
You already is muted for today's session,

10
00:00:21.245 --> 00:00:23.705
but if you do have any questions, you can submit them

11
00:00:23.705 --> 00:00:25.185
to me in the question box on the

12
00:00:25.185 --> 00:00:26.225
right hand side of your screen.

13
00:00:26.885 --> 00:00:29.185
And today's slides and recording will be made available

14
00:00:29.245 --> 00:00:31.265
to subscription members on the Open Minds

15
00:00:31.265 --> 00:00:32.425
website starting tomorrow.

16
00:00:33.045 --> 00:00:34.745
And with that, here's Dr. Dixon.

17
00:00:35.595 --> 00:00:37.145
Thank you, Corey. I appreciate it.

18
00:00:39.345 --> 00:00:42.085
Um, this is a presentation that Luke

19
00:00:42.085 --> 00:00:45.365
and I, uh, co-presented last year at the Executive

20
00:00:45.365 --> 00:00:47.325
Leadership Conference in Gettysburg.

21
00:00:47.625 --> 00:00:51.725
Um, so, uh, I'm gonna do my best to represent Luke's portion

22
00:00:51.985 --> 00:00:54.125
of the, uh, presentation.

23
00:00:56.265 --> 00:01:00.365
Um, first off, Luke talked a good bit about

24
00:01:00.545 --> 00:01:01.885
as a CEO

25
00:01:02.265 --> 00:01:06.805
and as an owner recognizing, um, the need

26
00:01:06.985 --> 00:01:09.285
for some change in leadership.

27
00:01:10.375 --> 00:01:14.435
Um, so he talked about how, how he went about this, that he

28
00:01:15.195 --> 00:01:17.435
identified the company's current status

29
00:01:18.375 --> 00:01:21.835
and recognized that we just weren't getting the outcomes

30
00:01:22.105 --> 00:01:23.155
that were intended.

31
00:01:23.265 --> 00:01:27.075
This is prior to me coming on board, um, with the team,

32
00:01:27.215 --> 00:01:29.515
the leadership team that he had in place at the time.

33
00:01:30.255 --> 00:01:32.915
Um, there were a lot of, uh, silos.

34
00:01:33.295 --> 00:01:37.955
Um, so we are a behavioral health company that, um,

35
00:01:39.185 --> 00:01:43.955
that has kind of a, a niche market for the kind

36
00:01:43.955 --> 00:01:46.675
of members that don't typically do well in standard

37
00:01:46.675 --> 00:01:48.235
outpatient behavioral healthcare.

38
00:01:49.055 --> 00:01:50.995
And, um, they come to us

39
00:01:51.495 --> 00:01:55.115
and, um, they, they get their housing,

40
00:01:55.405 --> 00:01:57.315
their behavioral health care,

41
00:01:57.935 --> 00:02:01.915
and lots of other, um, supports like, um,

42
00:02:02.615 --> 00:02:05.195
you know, medication management group

43
00:02:05.195 --> 00:02:08.995
and individual therapy, um, case management,

44
00:02:09.495 --> 00:02:10.795
uh, social work.

45
00:02:11.455 --> 00:02:13.475
Uh, we have certified peer specialists

46
00:02:13.495 --> 00:02:15.715
and things like that in our different programs.

47
00:02:16.495 --> 00:02:21.315
Um, but at the time that he was recognizing the need, um,

48
00:02:21.485 --> 00:02:24.875
there were a lot of just silos, just straight up and down.

49
00:02:25.015 --> 00:02:29.395
We had a, um, VP of our clinical services,

50
00:02:30.215 --> 00:02:34.235
so one VP of clinical psychologist

51
00:02:34.935 --> 00:02:39.355
who every decision about admitting people,

52
00:02:40.315 --> 00:02:43.435
discharging people, um, sending them to the hospital

53
00:02:43.495 --> 00:02:46.235
or rehab, everything had to flow in

54
00:02:46.235 --> 00:02:50.155
and out of literally her, her, um, computer.

55
00:02:51.215 --> 00:02:55.635
And then we had all these op programmatic staff, um,

56
00:02:55.695 --> 00:02:58.475
our operation staff, the program directors,

57
00:02:58.655 --> 00:03:01.605
the the residential assistants that worked with people,

58
00:03:01.945 --> 00:03:03.445
you know, on the ground day to day.

59
00:03:04.275 --> 00:03:06.685
They all reported up to another vp

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00:03:07.465 --> 00:03:10.445
and those two VPs weren't great at, at communicating.

61
00:03:10.505 --> 00:03:15.025
So there was a lot of, um, a lot of disjointed communication

62
00:03:15.125 --> 00:03:17.225
to the teams at the program level,

63
00:03:18.025 --> 00:03:19.185
and not a lot of, um,

64
00:03:19.375 --> 00:03:22.425
coordinated effort in growing the company together.

65
00:03:23.645 --> 00:03:26.305
Um, so he had, um,

66
00:03:27.295 --> 00:03:32.265
started a growth pattern, um, by branching out from

67
00:03:32.655 --> 00:03:36.465
what his father had started in project transition.

68
00:03:37.085 --> 00:03:41.065
His father, Lauren Crabtree, was a psychiatrist, um,

69
00:03:41.485 --> 00:03:44.505
who it was literally a mom and pop type of organization.

70
00:03:45.045 --> 00:03:48.505
He recognized the need for, um, you know,

71
00:03:48.595 --> 00:03:53.305
truly residential in the community kind of care that

72
00:03:53.415 --> 00:03:57.465
that allowed the community of members to support each other

73
00:03:57.565 --> 00:03:58.865
and be supported by staff.

74
00:03:59.805 --> 00:04:03.905
Um, when Luke then took over the ownership

75
00:04:03.905 --> 00:04:08.225
of the company from his father, when his father retired, uh,

76
00:04:08.405 --> 00:04:10.625
he started branching out into different products.

77
00:04:10.765 --> 00:04:13.905
So now it was a Regis residential treatment facility,

78
00:04:14.225 --> 00:04:18.545
a forensic diversion program, all supporting the same kind

79
00:04:18.545 --> 00:04:22.145
of members, but he was growing in these ways, um,

80
00:04:22.605 --> 00:04:25.825
and growing outside of the original state of Pennsylvania

81
00:04:25.835 --> 00:04:26.985
where the company was started.

82
00:04:28.495 --> 00:04:32.315
So he recognized that we needed to level up our services,

83
00:04:32.815 --> 00:04:34.155
um, both for our members,

84
00:04:34.295 --> 00:04:38.595
but also the payers, the states that, that we were in and,

85
00:04:38.775 --> 00:04:40.115
and providing supports in.

86
00:04:41.015 --> 00:04:42.195
And he recognized

87
00:04:42.195 --> 00:04:45.315
that his team at the time couldn't level up,

88
00:04:45.815 --> 00:04:48.575
um, on their own or with him.

89
00:04:48.995 --> 00:04:50.495
Uh, it was really, uh,

90
00:04:50.495 --> 00:04:52.215
pretty dysfunctional team at the time.

91
00:04:53.235 --> 00:04:57.775
So he wanted to make sure during this talk that we, we knew

92
00:04:57.775 --> 00:05:01.655
that there were two, two prongs of his approach to,

93
00:05:02.075 --> 00:05:03.855
um, rebuilding the team.

94
00:05:04.475 --> 00:05:05.895
One was in the planning and design,

95
00:05:05.915 --> 00:05:07.615
and one was in the implementation

96
00:05:07.675 --> 00:05:09.655
and the ongoing operations.

97
00:05:10.235 --> 00:05:12.455
So when we first gave this, this, um,

98
00:05:12.455 --> 00:05:15.655
presentation last year, he presented about the planning

99
00:05:15.675 --> 00:05:18.375
and design, and then I presented about the, um,

100
00:05:18.395 --> 00:05:20.135
implementation and operations.

101
00:05:22.595 --> 00:05:25.145
First off, um, he believes that you need

102
00:05:25.145 --> 00:05:27.785
to reacquaint yourself with key players,

103
00:05:28.155 --> 00:05:30.025
first off your, your customers.

104
00:05:30.765 --> 00:05:32.625
Um, so making sure

105
00:05:32.855 --> 00:05:36.585
that you have considered all the stakeholders perspectives

106
00:05:36.645 --> 00:05:40.225
before you make any big changes, um, in leadership

107
00:05:40.325 --> 00:05:41.425
and in your growth pattern.

108
00:05:42.415 --> 00:05:45.225
Know who the true decision makers are, um,

109
00:05:45.675 --> 00:05:50.105
among your payers, among, um, state agencies, among,

110
00:05:50.365 --> 00:05:52.025
um, collaborative partners.

111
00:05:52.565 --> 00:05:54.745
And then know the difference between them

112
00:05:54.925 --> 00:05:58.325
and the decision influencers and make influencers

113
00:05:58.345 --> 00:06:00.765
and make sure that you have, um,

114
00:06:01.675 --> 00:06:03.405
relationships at each level.

115
00:06:03.905 --> 00:06:07.445
Uh, so if, if you're talking to a C-suite person,

116
00:06:08.145 --> 00:06:11.365
you approach them with your C-suite, um, team leader.

117
00:06:11.625 --> 00:06:14.845
And if you're talking to maybe a decision influencer

118
00:06:15.555 --> 00:06:18.765
somewhere in the middle, uh, of an organization

119
00:06:18.985 --> 00:06:20.445
or between a state

120
00:06:20.505 --> 00:06:22.885
and an MCO that, that you know,

121
00:06:23.035 --> 00:06:26.485
that you have the right person at a similar level in your

122
00:06:26.485 --> 00:06:28.605
organization to, to reach out to them.

123
00:06:29.225 --> 00:06:30.565
And I apologize about that.

124
00:06:31.265 --> 00:06:34.645
And he used the term geek out on your customer.

125
00:06:35.025 --> 00:06:37.645
Um, so really make sure that,

126
00:06:37.715 --> 00:06:40.885
that you are giving the customer exactly what they want.

127
00:06:40.915 --> 00:06:42.445
Make sure you know what that is.

128
00:06:43.265 --> 00:06:47.605
Um, and then, um, so for us, it was, we always say we serve

129
00:06:47.605 --> 00:06:52.125
that top 3%, the most complex, the most challenging, um,

130
00:06:52.155 --> 00:06:54.285
members that any health plan has.

131
00:06:55.065 --> 00:06:57.445
And then that we know

132
00:06:57.545 --> 00:07:00.845
who our trusted champions are within those, um,

133
00:07:01.305 --> 00:07:05.845
health plans within, you know, state agencies to make sure

134
00:07:05.845 --> 00:07:08.365
that we've got someone on the inside that is truly,

135
00:07:08.825 --> 00:07:12.845
you know, um, uh, netting a benefit.

136
00:07:13.305 --> 00:07:15.765
Um, when we're looking at net promoter scores,

137
00:07:17.665 --> 00:07:21.485
he also suggested to identify one unifying core value

138
00:07:21.515 --> 00:07:24.845
that best aligns to the optimum outcome for the customer,

139
00:07:25.105 --> 00:07:28.005
and best aligns with his own, at the time,

140
00:07:28.365 --> 00:07:30.805
personal belief system and personal core values.

141
00:07:32.025 --> 00:07:33.485
So, um, he

142
00:07:33.485 --> 00:07:37.125
and I kind of did this together as we were doing the dance

143
00:07:37.265 --> 00:07:41.725
of, um, him kind of, uh, attracting me to the company,

144
00:07:41.775 --> 00:07:45.245
which I was already very familiar with, um, into the role

145
00:07:45.245 --> 00:07:46.565
that I was gonna take on.

146
00:07:47.465 --> 00:07:51.645
So as we kind of boiled down some of the, uh,

147
00:07:51.805 --> 00:07:54.405
I think we started out with 10 core values,

148
00:07:54.625 --> 00:07:55.845
and I'm like, we need three.

149
00:07:56.345 --> 00:07:59.565
So we came down to being person centered, um,

150
00:07:59.735 --> 00:08:02.645
using radical acceptance in our services and supports,

151
00:08:03.105 --> 00:08:07.925
and meet the person where they're at, became, um, our, uh,

152
00:08:08.555 --> 00:08:09.965
core value of community.

153
00:08:10.025 --> 00:08:12.205
And I'll talk more about that in a, in a little bit.

154
00:08:13.635 --> 00:08:14.935
And then identifying

155
00:08:14.955 --> 00:08:17.735
and onboarding all the resources, including the people

156
00:08:17.735 --> 00:08:20.775
and the leaders that share those traits

157
00:08:20.775 --> 00:08:22.815
that really believe in those core values.

158
00:08:22.915 --> 00:08:26.585
And I apologize, I thought I had shut that down.

159
00:08:27.565 --> 00:08:32.265
Um, so the, um, the, the folks

160
00:08:32.335 --> 00:08:36.385
that are already aligned with you, um, are the ones

161
00:08:36.385 --> 00:08:38.745
that you're gonna wanna keep on and bring up.

162
00:08:39.205 --> 00:08:42.265
So for us, the core values really are infused in

163
00:08:42.265 --> 00:08:43.305
everything we do.

164
00:08:44.405 --> 00:08:46.985
Um, and, uh, you'll see

165
00:08:46.985 --> 00:08:49.425
that in my presentation in a bit.

166
00:08:51.095 --> 00:08:53.065
Also, reacquaint yourself with you.

167
00:08:53.605 --> 00:08:58.085
Um, if you are the owner, the CEO of, um,

168
00:08:58.195 --> 00:09:03.085
this team, you, uh, have a big responsibility

169
00:09:03.545 --> 00:09:07.965
to make sure that you know your own, um, strengths

170
00:09:07.965 --> 00:09:09.885
and weaknesses and can hold yourself accountable.

171
00:09:10.705 --> 00:09:14.045
Um, he asked himself questions like,

172
00:09:14.045 --> 00:09:15.445
what do you really enjoy the most?

173
00:09:16.315 --> 00:09:17.565
Okay. Um,

174
00:09:17.745 --> 00:09:22.005
and for Luke, he enjoys watching over the finances,

175
00:09:22.105 --> 00:09:24.845
and he enjoys thinking about big ideas.

176
00:09:25.785 --> 00:09:28.245
Um, and that's what he's good at too.

177
00:09:29.185 --> 00:09:30.565
Um, what he didn't like

178
00:09:30.565 --> 00:09:33.245
as much was operations the day-to-day.

179
00:09:33.865 --> 00:09:37.125
And he also recognized he's not the strongest at that.

180
00:09:37.905 --> 00:09:42.525
So these became the gaps that he was looking to fill with,

181
00:09:42.785 --> 00:09:46.645
um, bringing on a partner, um, in leadership.

182
00:09:48.135 --> 00:09:51.635
So he reframed the gaps that he saw

183
00:09:51.975 --> 00:09:56.915
as an invitation to a partner, and he tried a few people out

184
00:09:56.915 --> 00:09:59.115
before, um, he landed with me.

185
00:10:00.905 --> 00:10:05.085
So he had looked back at data, um, from 2010 on

186
00:10:05.145 --> 00:10:06.485
and was seeing factors.

187
00:10:06.665 --> 00:10:11.445
And he, he understood that he was one

188
00:10:11.445 --> 00:10:12.805
of the largest limiting factors

189
00:10:12.835 --> 00:10:16.845
because he wasn't excellent at day-to-day operations.

190
00:10:17.265 --> 00:10:21.045
Um, which I, I cannot say enough about, um,

191
00:10:22.105 --> 00:10:27.085
the, the, the braveness of, of that kind

192
00:10:27.085 --> 00:10:28.525
of, um, personal.

193
00:10:29.825 --> 00:10:32.125
Um, this is a company he loves very much,

194
00:10:32.785 --> 00:10:34.125
and he gave it his best.

195
00:10:34.385 --> 00:10:36.645
And for him to decide, you know, I need

196
00:10:36.645 --> 00:10:38.765
to find somebody else that's better at this part.

197
00:10:39.385 --> 00:10:43.965
Um, I, I give him significant kudos all the time about that.

198
00:10:44.265 --> 00:10:47.685
Um, with it, we were also honest with ourselves.

199
00:10:49.475 --> 00:10:51.125
Next is determining the path.

200
00:10:51.345 --> 00:10:54.005
So what did he want for his organization?

201
00:10:54.825 --> 00:10:56.965
Um, he knew it was evolving.

202
00:10:57.265 --> 00:10:58.765
He knew that he was getting new

203
00:10:58.765 --> 00:11:00.165
opportunities for the company.

204
00:11:00.865 --> 00:11:04.365
Um, and as he, uh, began talking to me

205
00:11:05.415 --> 00:11:09.765
about why I came, wanted to come to this company, uh, he

206
00:11:09.765 --> 00:11:13.005
and I made a five-year plan, um,

207
00:11:13.185 --> 00:11:17.805
and decided, um, that we would partner together

208
00:11:18.395 --> 00:11:21.525
with, um, Luke doing the parts that he was best at

209
00:11:21.625 --> 00:11:24.005
and me doing the parts that I'm best at.

210
00:11:25.065 --> 00:11:27.605
So, um, you can see there the different things

211
00:11:27.605 --> 00:11:28.685
that he considered.

212
00:11:29.145 --> 00:11:33.045
Um, but what we did was come to an agreement

213
00:11:33.395 --> 00:11:37.725
that is basically a contract in addition to my salary that,

214
00:11:37.865 --> 00:11:40.005
um, gives me annual targets to hit.

215
00:11:40.665 --> 00:11:43.245
So now he's actually being a CEO

216
00:11:43.245 --> 00:11:45.125
where he gives me the targets

217
00:11:45.545 --> 00:11:48.445
and I am able to then operationalize that

218
00:11:48.465 --> 00:11:50.605
and deliver on those targets.

219
00:11:51.025 --> 00:11:54.685
Um, so that was very helpful as I was coming in.

220
00:11:55.785 --> 00:11:59.285
Uh, he also brought on, um,

221
00:12:00.245 --> 00:12:04.245
Les Nikko, who is a mentor in, um,

222
00:12:05.345 --> 00:12:07.125
in mind mapping and,

223
00:12:07.545 --> 00:12:11.605
and just a mentor for, for c-suite level executives, um,

224
00:12:11.825 --> 00:12:12.965
on improving their business.

225
00:12:13.545 --> 00:12:16.805
And he gave less unfettered access to the executive team,

226
00:12:16.875 --> 00:12:18.885
that team, that wasn't working well at the time.

227
00:12:19.425 --> 00:12:22.605
And then, um, the first year he worked with Luke.

228
00:12:22.625 --> 00:12:23.685
The second year he worked

229
00:12:23.685 --> 00:12:25.605
with the executive leaders and brought me in.

230
00:12:26.025 --> 00:12:27.565
And then the next year he,

231
00:12:27.905 --> 00:12:30.005
he dove down into the regional leadership,

232
00:12:30.625 --> 00:12:33.605
and then he, on his fourth year, started working

233
00:12:33.605 --> 00:12:35.125
with our program directors.

234
00:12:35.505 --> 00:12:39.965
Um, so he ended up being able to hear,

235
00:12:40.585 --> 00:12:45.205
um, in a non-judgmental way from every layer

236
00:12:45.205 --> 00:12:49.965
of leadership, and then feedback to Luke

237
00:12:49.985 --> 00:12:51.285
and to myself and then,

238
00:12:51.465 --> 00:12:53.805
and then also to the executive team that we've put together

239
00:12:54.575 --> 00:12:58.485
about, um, how, how information

240
00:12:58.585 --> 00:13:02.085
and how the culture was shifting throughout all LA layers

241
00:13:02.225 --> 00:13:03.285
of the organization.

242
00:13:05.995 --> 00:13:08.335
Um, less brought to Luke

243
00:13:08.515 --> 00:13:12.935
and to myself, um, this, uh, way to consider

244
00:13:13.035 --> 00:13:14.935
how we evaluate certain things.

245
00:13:15.675 --> 00:13:18.855
So you'll see in the middle of that industry benchmark.

246
00:13:19.275 --> 00:13:22.735
So everything below that line are the things you have

247
00:13:22.735 --> 00:13:25.015
to do well, they're the doing things,

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248
00:13:25.115 --> 00:13:28.455
but they are also the lowest order of

249
00:13:28.915 --> 00:13:30.735
of operations.

250
00:13:31.105 --> 00:13:33.175
These are the things that if you don't do well,

251
00:13:33.595 --> 00:13:35.735
you're gonna have reduced asset value.

252
00:13:36.075 --> 00:13:39.375
And then the things above that line, um, you'll see some

253
00:13:39.375 --> 00:13:40.575
of them are called the being,

254
00:13:40.955 --> 00:13:44.295
and that is building your brand architecture, um,

255
00:13:44.665 --> 00:13:48.095
channeling, uh, or I mean, extending channels

256
00:13:48.195 --> 00:13:51.935
and products, uh, to grow to, uh,

257
00:13:52.115 --> 00:13:54.895
become innovative in your systems and your products,

258
00:13:55.195 --> 00:13:58.415
and also to, um, really grow your talent,

259
00:13:58.485 --> 00:13:59.975
your capability, your culture.

260
00:14:00.865 --> 00:14:03.735
These are all things that that help you

261
00:14:03.875 --> 00:14:07.735
as a company be something to believe in and to get behind.

262
00:14:07.915 --> 00:14:11.455
And they are also things that enhance the asset value.

263
00:14:12.315 --> 00:14:16.055
And then the highest level of valuation would be Will.

264
00:14:16.435 --> 00:14:20.135
And he, um, shows that as scaling with purpose.

265
00:14:21.115 --> 00:14:23.815
And so obviously I'm coming in

266
00:14:23.995 --> 00:14:26.095
and I know we have a lot of work

267
00:14:26.115 --> 00:14:28.615
to do on the doing level right off the bat.

268
00:14:29.155 --> 00:14:32.535
Um, but likewise, I have to be working on being

269
00:14:32.635 --> 00:14:34.135
and shooting for the will

270
00:14:34.135 --> 00:14:35.855
because we needed to scale with purpose

271
00:14:38.675 --> 00:14:39.825
onboarding your partner.

272
00:14:40.085 --> 00:14:42.745
So for Luke, um, this was me.

273
00:14:43.685 --> 00:14:46.865
So, uh, he wanted to make sure

274
00:14:46.865 --> 00:14:48.825
that I aligned Phil philosophically

275
00:14:48.825 --> 00:14:52.765
and morally, um, with his, uh, five-year plan

276
00:14:52.765 --> 00:14:53.885
that we agreed on together,

277
00:14:54.425 --> 00:14:57.485
unless our mentor assists us in that, um,

278
00:14:57.785 --> 00:15:00.005
always asking the toughest questions

279
00:15:00.005 --> 00:15:01.285
of the exact right moment.

280
00:15:02.145 --> 00:15:05.165
So if that alignment is high between the CEO

281
00:15:05.305 --> 00:15:08.405
and I came in as the, the president, um,

282
00:15:08.915 --> 00:15:11.285
then consider an employment agreement

283
00:15:11.425 --> 00:15:12.685
that's very collaborative

284
00:15:13.065 --> 00:15:16.565
and, um, driven by those, um, targets.

285
00:15:17.505 --> 00:15:21.445
And that is the contract that Luke and I have between us.

286
00:15:22.185 --> 00:15:25.045
Um, and then he made sure that my total compensation,

287
00:15:25.225 --> 00:15:29.925
not just my salary base, um, directionally mirrors the,

288
00:15:30.225 --> 00:15:32.045
um, the minimum goals.

289
00:15:32.665 --> 00:15:37.125
And then if I shoot above those goals, um, that I, I get

290
00:15:37.805 --> 00:15:41.725
reimbursed in, um, in proportion with, uh,

291
00:15:42.345 --> 00:15:44.795
um, my performance.

292
00:15:45.495 --> 00:15:50.435
So, although I am truly not a very money motivated person

293
00:15:50.615 --> 00:15:52.835
at all, um, I know people will say that,

294
00:15:52.855 --> 00:15:56.005
but everybody that knows me is like, we know.

295
00:15:56.385 --> 00:15:57.605
Um, but,

296
00:15:57.745 --> 00:16:00.685
but Luke felt it very important to make sure

297
00:16:00.875 --> 00:16:04.285
that my compensation package, um,

298
00:16:05.145 --> 00:16:08.805
really rewarded me for growing his company.

299
00:16:09.875 --> 00:16:11.135
Um, and then

300
00:16:11.175 --> 00:16:14.215
likewise, as I've built a leadership team,

301
00:16:14.805 --> 00:16:16.135
I've wanted to do the same thing.

302
00:16:16.245 --> 00:16:18.255
They are also getting rewarded for,

303
00:16:18.675 --> 00:16:20.295
for me meeting my goals for Luke.

OPEN MINDS

304
00:16:20.755 --> 00:16:22.815
Um, they're getting rewarded as well.

305
00:16:23.795 --> 00:16:27.135
Um, and then making sure that your partner's, uh,

306
00:16:27.135 --> 00:16:29.655
appropriately resourced to be successful.

307
00:16:30.035 --> 00:16:32.535
Um, so, uh, again,

308
00:16:32.535 --> 00:16:36.135
because he likes to, to hang onto the treasury,

309
00:16:36.275 --> 00:16:37.855
and that's what he is really good at.

310
00:16:38.035 --> 00:16:39.455
And it is not my strength.

311
00:16:39.815 --> 00:16:41.055
I know quite a bit about it, but I would

312
00:16:41.055 --> 00:16:42.135
not say that's my strength.

313
00:16:42.955 --> 00:16:44.575
Um, he's able sometimes

314
00:16:44.715 --> 00:16:47.055
to see the resource needs before I even do.

315
00:16:48.735 --> 00:16:53.475
So, he, um, made a functional org chart where he's

316
00:16:53.475 --> 00:16:55.875
that CEO and he's over legal.

317
00:16:56.145 --> 00:16:58.235
He's, he's also a jd, um,

318
00:16:58.535 --> 00:16:59.915
and an MBA, so legal,

319
00:17:00.335 --> 00:17:02.235
the corporate structure and the treasury.

320
00:17:02.775 --> 00:17:06.755
So, um, the VP of Finance provides data to him,

321
00:17:06.775 --> 00:17:09.115
but actually reports to me, um,

322
00:17:09.115 --> 00:17:11.395
because I'm overall operations.

323
00:17:11.695 --> 00:17:13.835
Um, we actually have two sister companies,

324
00:17:13.835 --> 00:17:16.715
project transition and person centered supports.

325
00:17:16.935 --> 00:17:19.195
Um, and we are now spinning off, uh,

326
00:17:19.305 --> 00:17:22.075
5 0 1 C3 called Project Tomorrow.

327
00:17:22.495 --> 00:17:24.115
And all of those report up to me,

328
00:17:24.615 --> 00:17:26.555
and I'm over the executive leadership,

329
00:17:26.725 --> 00:17:29.555
which is shared across those three companies.

330
00:17:32.135 --> 00:17:33.475
So here starts my part.

331
00:17:33.775 --> 00:17:38.075
So I come in and I know why I'm being brought in, um,

332
00:17:39.105 --> 00:17:41.515
because we've had very real, you know,

333
00:17:41.515 --> 00:17:42.915
conversations about this.

334
00:17:43.495 --> 00:17:45.755
But I also have to decide for myself,

335
00:17:46.515 --> 00:17:48.915
stepping into the leadership of this company

336
00:17:48.995 --> 00:17:51.765
that I've watched from afar and collaborated with.

337
00:17:52.035 --> 00:17:54.485
When I was at an MCO, I had

338
00:17:54.485 --> 00:17:56.325
to ask myself, why am I doing this?

339
00:17:57.305 --> 00:17:58.645
Um, so

340
00:17:58.985 --> 00:18:01.765
before embarking on a change, um, I had

341
00:18:01.765 --> 00:18:03.645
to do a rapid assessment of where the company was.

342
00:18:04.305 --> 00:18:07.245
Um, how I did that was, I literally came

343
00:18:07.265 --> 00:18:08.965
before I was even hired on.

344
00:18:09.425 --> 00:18:12.405
And I, and I credit Luke tremendously for this too.

345
00:18:12.905 --> 00:18:15.125
He gave me unfettered access to everybody.

346
00:18:15.665 --> 00:18:17.805
So I went to all of the different programs.

347
00:18:18.285 --> 00:18:22.045
I, um, interviewed staff at all different levels, um,

348
00:18:22.505 --> 00:18:26.445
and spent time with some of the leaders, um, to quickly

349
00:18:27.145 --> 00:18:29.885
get a, a, a read on where we're at.

350
00:18:31.065 --> 00:18:35.845
So, um, it became very clear to me that those silos had

351
00:18:35.845 --> 00:18:40.205
to be abolished because, um, the, the leadership void

352
00:18:40.395 --> 00:18:42.445
that they created, um,

353
00:18:42.925 --> 00:18:45.325
actually was holding the company from being able to grow.

354
00:18:45.545 --> 00:18:48.085
You can't grow with everything clinical being

355
00:18:48.085 --> 00:18:49.205
decided by one person.

356
00:18:49.825 --> 00:18:51.445
It was never going to work that way.

357
00:18:52.345 --> 00:18:56.645
Um, I got to hear about from different layers, what they saw

358
00:18:56.825 --> 00:18:58.365
as the errors of leadership

359
00:18:58.425 --> 00:19:00.685
and what they actually hoped would not change.

360
00:19:01.945 --> 00:19:05.405
Um, I got to know the different customer relationships,

361
00:19:06.535 --> 00:19:08.475
and some of them I actually got to talk to

362
00:19:08.495 --> 00:19:10.275
before I started the position.

363
00:19:10.695 --> 00:19:13.635
But a lot of them I heard about from the,

364
00:19:13.895 --> 00:19:15.475
the current staff at the time,

365
00:19:16.735 --> 00:19:18.875
and I got to see the staff relationships.

366
00:19:18.955 --> 00:19:21.395
I particularly wanted to know what was happening

367
00:19:21.395 --> 00:19:23.875
with the trust level in the company, um,

368
00:19:24.735 --> 00:19:28.755
why people were still here, um, what,

369
00:19:29.265 --> 00:19:31.875
what they wanted from the company.

370
00:19:32.535 --> 00:19:36.435
Um, do we share a, a sense of direction and a purpose

371
00:19:37.215 --> 00:19:39.035
and desiring to do what's right.

372
00:19:40.275 --> 00:19:43.235
I also got, uh, a look at the financials,

373
00:19:43.695 --> 00:19:48.275
and immediately, I think my first, um, my first thing

374
00:19:48.275 --> 00:19:50.315
that came out of my mouth about financials was,

375
00:19:50.495 --> 00:19:51.635
oh, we are hemorrhaging.

376
00:19:52.945 --> 00:19:57.275
Because we, we absolutely had multiple, um,

377
00:19:57.595 --> 00:20:01.115
programs that we're not making money, we're losing a lot

378
00:20:01.115 --> 00:20:04.595
of money, and would never be able at the current rates

379
00:20:04.895 --> 00:20:09.675
and the current, um, structure, be able to, um, make money.

380
00:20:10.295 --> 00:20:13.715
Um, that leadership team that wasn't working very well

381
00:20:13.715 --> 00:20:16.355
before had actually contract,

382
00:20:17.305 --> 00:20:20.035
written some contracts for services

383
00:20:20.145 --> 00:20:21.795
that they did not know how to provide.

384
00:20:22.575 --> 00:20:24.115
Um, and they undervalued.

385
00:20:24.255 --> 00:20:26.995
So the rates were way off of where they needed to be.

386
00:20:27.575 --> 00:20:31.275
Um, they built, uh, services, and I'll give you an example.

387
00:20:31.335 --> 00:20:35.435
We have a residential treatment facility in the Poconos.

388
00:20:36.335 --> 00:20:38.035
Sounds lovely. It is lovely.

389
00:20:39.245 --> 00:20:42.665
Try hiring people in the Poconos when you need, um, nurses

390
00:20:43.365 --> 00:20:47.605
and social workers, and not very many people live there.

391
00:20:48.035 --> 00:20:50.165
It's a, it's kind of a tourist attraction,

392
00:20:50.165 --> 00:20:51.845
particularly in the winter months.

393
00:20:52.385 --> 00:20:54.085
Um, and then everybody goes back home.

394
00:20:54.505 --> 00:20:56.925
So there wasn't an employee pool there.

395
00:20:57.745 --> 00:21:01.925
Um, the, the rate was not, um, correct for the number

396
00:21:01.925 --> 00:21:04.805
of people, so we had no ability to, um,

397
00:21:05.255 --> 00:21:07.045
scale up that program.

398
00:21:07.905 --> 00:21:10.145
Um, so I gotta see that.

399
00:21:10.325 --> 00:21:11.505
And then the operations,

400
00:21:11.575 --> 00:21:13.385
just asking people, what is working?

401
00:21:13.735 --> 00:21:15.065
What is not working for you?

402
00:21:15.805 --> 00:21:20.345
Uh, what do you know about the quality of our services?

403
00:21:20.345 --> 00:21:22.945
Where are the outcomes? We didn't have any.

404
00:21:23.765 --> 00:21:26.185
Um, what's the compliance for people?

405
00:21:26.645 --> 00:21:28.785
You know, what's our data telling us about people

406
00:21:29.705 --> 00:21:31.385
actually doing the things

407
00:21:31.385 --> 00:21:33.305
that are in our policy and procedures?

408
00:21:33.815 --> 00:21:35.425
They had got a, a start on that.

409
00:21:35.885 --> 00:21:38.905
Um, but all of that information was at the very top,

410
00:21:39.325 --> 00:21:41.785
and none of it was pushed down, um,

411
00:21:41.965 --> 00:21:43.385
to the programs themselves.

412
00:21:43.965 --> 00:21:45.825
The programs were very much in service

413
00:21:46.085 --> 00:21:49.105
to the executive leadership instead of the other way around.

414
00:21:50.535 --> 00:21:52.195
So staff didn't always understand

415
00:21:52.195 --> 00:21:53.435
what to do or why to do it.

00:21:54.745 --> 00:21:57.205
So then I asked myself, why am I here?

417
00:21:57.205 --> 00:22:00.165
Why did I come to this company at this point in my career?

418
00:22:00.705 --> 00:22:04.405
Um, I'm 61. I came on three years ago, so I was 58.

419
00:22:05.225 --> 00:22:08.965
Um, this was going to be my last hurrah.

420
00:22:09.265 --> 00:22:11.405
Um, but why did I choose this?

421
00:22:11.985 --> 00:22:13.605
So for me, it was pretty simple.

422
00:22:14.185 --> 00:22:18.285
Um, this company was like no other I had ever seen in

423
00:22:18.925 --> 00:22:20.245
actually living its core values.

424
00:22:21.065 --> 00:22:24.085
Um, our members, as we call them, instead of patients

425
00:22:24.085 --> 00:22:27.775
or clients, um, come first

426
00:22:28.195 --> 00:22:31.215
and we hang in there with some of the worst behavior.

427
00:22:31.635 --> 00:22:34.375
Um, people don't typically get evicted from us.

428
00:22:34.395 --> 00:22:35.575
It, it occasionally happens,

429
00:22:35.755 --> 00:22:40.095
but they are, they are, um, loved

430
00:22:40.115 --> 00:22:42.375
and supported in a way I did not see in any other

431
00:22:42.375 --> 00:22:43.455
behavioral health provider.

432
00:22:43.915 --> 00:22:48.575
Um, when I was working with project transition as the MCO,

433
00:22:49.645 --> 00:22:52.625
uh, and then why have good people and future leaders?

434
00:22:52.945 --> 00:22:56.465
I was shocked. So the executive leadership at that time,

435
00:22:57.095 --> 00:22:58.625
there's only one left standing.

436
00:22:59.445 --> 00:23:03.565
Um, they were doing all the wrong things, um,

437
00:23:03.745 --> 00:23:05.645
and to me weren't good leaders at all.

438
00:23:06.305 --> 00:23:10.125
But these middle management leaders were amazing.

439
00:23:11.375 --> 00:23:15.475
And they all spoke to me very freely about the trauma

440
00:23:15.655 --> 00:23:19.795
of working for this executive leadership team that, um,

441
00:23:20.375 --> 00:23:22.675
really denigrated them and devalued them.

442
00:23:23.255 --> 00:23:24.835
And I kept asking everybody,

443
00:23:25.215 --> 00:23:27.195
why in the world would you have stayed here?

444
00:23:27.855 --> 00:23:29.835
And everybody talked about the core values

445
00:23:29.985 --> 00:23:31.595
that they still believed in

446
00:23:31.595 --> 00:23:33.355
what this company was supposed to be doing.

447
00:23:34.455 --> 00:23:36.995
And then I got to ask them about their hopes and dreams.

448
00:23:37.815 --> 00:23:41.755
And everybody said, I want this place to be here forever.

449
00:23:42.515 --> 00:23:44.475
I want, you know, these kind of programs

450
00:23:44.495 --> 00:23:47.285
and what we do to really go far in the future.

451
00:23:47.545 --> 00:23:51.225
And that so closely aligned with what I wanted.

452
00:23:51.885 --> 00:23:55.345
Um, I have said it many times to staff, um,

453
00:23:55.605 --> 00:23:57.945
in different meetings, and I couldn't be

454
00:23:57.945 --> 00:23:59.025
more honest about this.

455
00:23:59.185 --> 00:24:03.105
I want this company to be flourishing 50 years from now.

456
00:24:03.555 --> 00:24:08.225
It'll be different, but this same, um, culture

457
00:24:08.485 --> 00:24:12.865
and atmosphere and core value system about, um,

458
00:24:13.085 --> 00:24:15.905
we treat our members as human beings, um,

459
00:24:16.205 --> 00:24:19.425
and we give them a very person centered, um,

460
00:24:21.695 --> 00:24:24.235
uh, range of supports and services.

461
00:24:24.575 --> 00:24:27.435
Um, I want that to be happening 50 years from now,

462
00:24:28.855 --> 00:24:30.875
and then got to the point where it was time

463
00:24:30.875 --> 00:24:34.835
to clarify the core values, to speak to the why, and,

464
00:24:35.015 --> 00:24:37.115
and keep it simple so

465
00:24:37.115 --> 00:24:40.435
that I could start messaging as I walked in.

466
00:24:41.135 --> 00:24:44.235
Um, you know, that, how are we different?

467
00:24:45.785 --> 00:24:47.955
What sets us apart from our competitors?

468
00:24:47.985 --> 00:24:50.915
Because we won't be here very long if we can't define that.

469
00:24:51.625 --> 00:24:54.275
What do we do best? What do we wanna do best?

470
00:24:54.975 --> 00:24:57.675
Um, and, and started with that messaging.

471
00:24:59.465 --> 00:25:02.405
So I mentioned that our core values are radical acceptance,

472
00:25:02.405 --> 00:25:03.725
person-centered supports,

473
00:25:04.265 --> 00:25:08.725
and the, the use of community, um, to build a sense

474
00:25:08.725 --> 00:25:10.725
of belonging, to build in

475
00:25:11.515 --> 00:25:15.045
peer support while people are getting services and supports.

476
00:25:18.325 --> 00:25:21.665
It was very important to align staff expectations

477
00:25:21.665 --> 00:25:25.505
with those core values because, um, I looked around

478
00:25:25.505 --> 00:25:27.945
and saw a bunch of people who believed the same things I

479
00:25:27.945 --> 00:25:29.705
did, and the same things Luke did.

480
00:25:29.985 --> 00:25:31.305
I mean, Luke set the tone.

481
00:25:31.805 --> 00:25:33.945
Um, he just wasn't good at operationalizing it.

482
00:25:34.365 --> 00:25:38.265
So, um, I started looking for, where's my leadership team?

483
00:25:39.135 --> 00:25:43.465
Okay? And if you shared the core values you were going

484
00:25:43.465 --> 00:25:44.985
to rise, and that did happen.

485
00:25:45.805 --> 00:25:50.385
So those, uh, people who, who don't live the core values,

486
00:25:50.445 --> 00:25:53.465
and it was, it's very evident if you don't, um,

487
00:25:53.605 --> 00:25:56.465
we had a moral responsibility to the rest of the company,

488
00:25:56.645 --> 00:26:00.185
to the rest of those, um, people who were in it

489
00:26:00.185 --> 00:26:02.585
for the right reasons to help them exit.

490
00:26:03.125 --> 00:26:06.985
Um, so again, most of the senior leadership team exited.

491
00:26:07.205 --> 00:26:09.945
We ended up, um, with just our VP

492
00:26:10.125 --> 00:26:12.745
of human resources, um, staying on.

493
00:26:14.395 --> 00:26:17.335
So as I'm looking at the staff and,

494
00:26:17.395 --> 00:26:21.775
and I'm bringing up new leaders from within the company,

495
00:26:22.355 --> 00:26:26.255
I'm asking them who's working in the company's best interest

496
00:26:26.675 --> 00:26:28.055
versus their own interest?

497
00:26:28.555 --> 00:26:30.975
And again, at the very top, it was evident

498
00:26:31.005 --> 00:26:34.335
that the executive leaders work extremely,

499
00:26:34.635 --> 00:26:35.655
um, self-centered.

500
00:26:36.245 --> 00:26:37.495
They were there for themselves.

501
00:26:37.685 --> 00:26:40.495
They were there for sometimes narcissistic reasons.

502
00:26:40.775 --> 00:26:43.805
I have to be the one, you know, to make all things work.

503
00:26:44.145 --> 00:26:47.925
Um, they, they weren't there to collaborate on growth.

504
00:26:47.925 --> 00:26:50.285
They were there literally to argue their own point

505
00:26:50.625 --> 00:26:52.605
and to not change.

506
00:26:53.505 --> 00:26:58.245
So, um, I did a lot of talking to, um, the,

507
00:26:58.305 --> 00:27:02.285
the future leaders about, um, if you wanna grow

508
00:27:02.285 --> 00:27:03.725
with this company, you have every

509
00:27:03.725 --> 00:27:05.565
opportunity, every opportunity.

510
00:27:05.645 --> 00:27:08.285
I love to hire from within. I love to promote from within.

511
00:27:08.985 --> 00:27:12.405
Um, but what I need to see from you is

512
00:27:12.435 --> 00:27:13.925
that it's less about me

513
00:27:14.065 --> 00:27:17.205
and more about the, the, um, don't know if you can tell

514
00:27:17.205 --> 00:27:21.125
that I'm a Quaker, but, um, that, that it really is.

515
00:27:21.385 --> 00:27:25.165
Um, we all should be speaking about what we can do

516
00:27:25.785 --> 00:27:27.725
for our members, what we can do for each other,

517
00:27:27.835 --> 00:27:31.245
what we can do as a, a team instead of

518
00:27:31.395 --> 00:27:32.805
what I'm doing for myself.

519
00:27:33.185 --> 00:27:35.125
You know, I'm getting promoted, I'm getting a raise.

520
00:27:36.255 --> 00:27:39.835
Um, and pretty quickly within a year, um,

521
00:27:40.135 --> 00:27:41.755
we had multiple people drop out

522
00:27:41.755 --> 00:27:44.715
because they were more about me than the, um,

523
00:27:44.855 --> 00:27:49.245
but those were who were more about the started rising up.

524
00:27:49.705 --> 00:27:54.445
Um, so then, uh, Les Nikka, our, our mine,

525
00:27:55.025 --> 00:27:59.845
uh, set mentor, um, also worked with the leaders

526
00:27:59.915 --> 00:28:00.965
that were coming up.

527
00:28:01.865 --> 00:28:05.205
And we, uh, helped them assess

528
00:28:06.315 --> 00:28:07.575
who at their level

529
00:28:07.795 --> 00:28:12.055
and who, um, that they were supervising had these three

530
00:28:12.795 --> 00:28:14.655
traits for leadership.

531
00:28:15.315 --> 00:28:18.615
And each of these three have to be present, um,

532
00:28:18.755 --> 00:28:20.095
to be a high performing leader.

533
00:28:20.755 --> 00:28:22.135
So does the person get it?

534
00:28:22.555 --> 00:28:25.935
Do they live, breathe, and speak our core values?

535
00:28:26.155 --> 00:28:28.175
You can just, you can feel it when you're with them.

536
00:28:28.595 --> 00:28:30.375
Um, I know this is kind of touchy feely,

537
00:28:30.375 --> 00:28:31.495
and we did a lot of talk about, well,

538
00:28:31.495 --> 00:28:32.695
how do you define this?

539
00:28:33.555 --> 00:28:37.195
But it kept coming back to we can point to

540
00:28:37.195 --> 00:28:38.595
where these people are,

541
00:28:38.815 --> 00:28:41.235
are evidencing the core values in their daily work.

542
00:28:42.855 --> 00:28:44.715
Who wants it? These are the people

543
00:28:44.815 --> 00:28:46.475
who wanna achieve our purpose.

544
00:28:47.225 --> 00:28:49.795
They align their immediate career goals to do so.

545
00:28:50.625 --> 00:28:54.285
And so they can tell you, I wanna be a therapist.

546
00:28:54.685 --> 00:28:56.045
I wanna be a social worker someday.

547
00:28:56.285 --> 00:28:57.525
I, right now I'm a case manager,

548
00:28:57.625 --> 00:29:00.445
but I, I really want to work in this company.

549
00:29:00.705 --> 00:29:03.805
And I've had multiple people over the last three years tell

550
00:29:03.805 --> 00:29:06.245
me, I wanna retire from this company someday.

551
00:29:06.395 --> 00:29:09.485
This is, this is where, you know, I get to do the kind

552
00:29:09.485 --> 00:29:13.165
of work that's meaningful to me, and then who can do it?

553
00:29:13.665 --> 00:29:16.165
So we have people with all best intentions.

554
00:29:16.235 --> 00:29:18.245
They, they get it, they want it,

555
00:29:19.065 --> 00:29:20.925
but they can't do the job they're in.

556
00:29:21.425 --> 00:29:23.485
And it may just be they're in the wrong seat.

557
00:29:24.385 --> 00:29:27.565
Um, or it may be that they just lack skills even

558
00:29:27.565 --> 00:29:29.325
after being trained and retrained.

559
00:29:29.985 --> 00:29:33.285
So, um, those people may be people that just have

560
00:29:33.285 --> 00:29:35.805
to be supervised really well to be a,

561
00:29:36.145 --> 00:29:37.885
we talk about A, B, and C players.

562
00:29:38.465 --> 00:29:40.805
Um, a players will have all of these things.

563
00:29:41.725 --> 00:29:45.005
A b player probably isn't gonna rise in leadership.

564
00:29:45.505 --> 00:29:48.165
Um, and without a lot of supervision.

565
00:29:48.425 --> 00:29:50.205
And, um, a lot

566
00:29:50.205 --> 00:29:53.285
of difficult conversations about what has to change.

567
00:29:54.835 --> 00:29:58.175
And then we aligned our KPIs, our salaries,

568
00:29:58.175 --> 00:30:00.495
and our incentives to reward those people

569
00:30:00.555 --> 00:30:02.455
who are collaborating toward our purpose

570
00:30:02.555 --> 00:30:06.335
and core values, very intentionally started planning this.

571
00:30:08.765 --> 00:30:12.265
So I keep talking about I got rid of these other, you know,

572
00:30:12.285 --> 00:30:15.385
old leadership and got people brought them up from within.

573
00:30:16.245 --> 00:30:17.465
And that meant that I had

574
00:30:17.465 --> 00:30:19.785
to make room at the table for these people.

575
00:30:20.965 --> 00:30:22.425
So you have to understand

576
00:30:22.425 --> 00:30:25.265
that Luke had seen them in their old positions,

577
00:30:25.765 --> 00:30:27.505
had not been very impressed by them.

578
00:30:28.195 --> 00:30:31.805
Okay? Part of this was, um, Luke is looking

579
00:30:31.865 --> 00:30:34.005
for something very different in leaders than I was.

580
00:30:34.745 --> 00:30:37.965
Uh, and so I let 'em know that,

581
00:30:38.065 --> 00:30:41.045
and I basically had to say, I need you to sit back a bit

582
00:30:41.825 --> 00:30:43.605
and let me show you what they can do.

583
00:30:43.835 --> 00:30:47.725
Because again, I was amazed at the strengths

584
00:30:47.795 --> 00:30:49.005
that I saw around me.

585
00:30:49.545 --> 00:30:54.085
And so I started giving, um, these leaders projects.

586
00:30:55.645 --> 00:31:00.085
So, um, I'm gonna hop down to the, the second part

587
00:31:00.085 --> 00:31:01.605
of this slide, uh, at the bottom.

588
00:31:02.105 --> 00:31:03.405
So I really started thinking,

589
00:31:03.555 --> 00:31:05.645
what voices do I need at the table?

590
00:31:06.815 --> 00:31:08.325
Where are my blind spots?

591
00:31:08.905 --> 00:31:11.005
Um, and I could rattle 'em off for you.

592
00:31:11.005 --> 00:31:13.205
It's always good to know, this is what I'm good at.

593
00:31:13.205 --> 00:31:15.485
This is what I'm not. I need this kind

594
00:31:15.485 --> 00:31:17.285
of person at my right hand all the time.

595
00:31:18.185 --> 00:31:23.045
Um, and then make room for them to own those, um,

596
00:31:24.255 --> 00:31:25.485
areas of expertise.

597
00:31:26.385 --> 00:31:29.085
Uh, and I give you a a good example.

598
00:31:29.465 --> 00:31:33.485
We had, um, a person who's now my VP

599
00:31:33.485 --> 00:31:37.285
of business development, um, incredibly bright,

600
00:31:37.835 --> 00:31:39.725
very socially skilled, has

601
00:31:40.025 --> 00:31:43.685
so many skills in her backpack all the time

602
00:31:44.075 --> 00:31:46.005
that I'm just in awe of her.

603
00:31:47.195 --> 00:31:48.805
Luke had been calling her pizza girl

604
00:31:49.035 --> 00:31:52.525
because she would organize, you know,

605
00:31:52.635 --> 00:31:54.485
when we needed a lunch or something.

606
00:31:54.585 --> 00:31:58.245
And that's one of her many, many, many skills, okay?

607
00:31:58.305 --> 00:31:59.685
And I kept looking at him like,

608
00:32:00.015 --> 00:32:01.725
pizza girl, what are you talking about?

609
00:32:01.815 --> 00:32:03.805
She's amazing. And he is like, well,

610
00:32:03.885 --> 00:32:05.725
I don't know if she's very strong, you know,

611
00:32:05.725 --> 00:32:08.885
and so I would just start giving her the floor

612
00:32:09.425 --> 00:32:11.445
and I'd say, Ellen, time to come in

613
00:32:11.505 --> 00:32:13.605
and I need you to present about this, this, and this.

614
00:32:14.105 --> 00:32:16.445
She would come in and he would be blown away.

615
00:32:17.495 --> 00:32:20.195
Um, wow, I didn't know that she could do those things.

616
00:32:20.375 --> 00:32:22.675
And I'm like, yeah, she can do a lot more.

617
00:32:23.415 --> 00:32:28.155
Um, so what went from Luke needing

618
00:32:28.155 --> 00:32:30.435
to present to all payer sources

619
00:32:30.615 --> 00:32:34.995
and all, um, state agencies quickly changed to Ellen

620
00:32:35.495 --> 00:32:39.445
and I presenting, and Luke kind of hopping in,

621
00:32:39.985 --> 00:32:41.885
and then he started sitting back and listening.

622
00:32:41.905 --> 00:32:44.645
And then he basically said to us, you guys are

623
00:32:44.645 --> 00:32:46.285
so much better at this than I am.

624
00:32:46.525 --> 00:32:47.805
I don't even need to be on these calls.

625
00:32:48.705 --> 00:32:52.005
So it, it showed him what Ellen could do.

626
00:32:52.105 --> 00:32:55.885
And we have a story for each of our executive, uh, leader

627
00:32:56.515 --> 00:32:58.725
leaders, very similar to that,

628
00:32:58.955 --> 00:33:01.325
that he had not seen their strengths

629
00:33:01.555 --> 00:33:04.725
because their executive leaders prior to that

630
00:33:05.425 --> 00:33:07.445
had tamped them down, um,

631
00:33:07.585 --> 00:33:10.005
and made sure that, that they didn't get a chance to shine.

632
00:33:11.595 --> 00:33:15.775
So, um, we had some quiet leaders, I I mentioned our VP of,

633
00:33:15.915 --> 00:33:20.375
of human resources, um, again, incredibly sharp,

634
00:33:20.685 --> 00:33:21.895
very good at what she does,

635
00:33:22.755 --> 00:33:25.615
but had felt she's an African American woman.

636
00:33:26.905 --> 00:33:30.125
And one of the things I did on my rapid assessment was talk

637
00:33:30.125 --> 00:33:31.885
to her about why are you on the leadership team?

638
00:33:31.945 --> 00:33:33.085
How, where do you sit? And I don't

639
00:33:33.085 --> 00:33:34.125
even know if I should be here.

640
00:33:34.445 --> 00:33:35.885
I just feel like a token.

641
00:33:37.615 --> 00:33:39.795
You know, you could have thrown a spear into my heart

642
00:33:39.795 --> 00:33:41.035
to hear anybody say that.

643
00:33:41.375 --> 00:33:44.475
And, and so I had the, um,

644
00:33:45.775 --> 00:33:49.435
the tough conversation with her is like, I need you, Gloria.

645
00:33:49.835 --> 00:33:53.475
I need all this expertise that you bring, all these ideas

646
00:33:53.475 --> 00:33:57.195
that you just told me is exactly in line with what I need,

647
00:33:57.455 --> 00:33:59.235
but you're gonna have to speak up

648
00:33:59.975 --> 00:34:01.475
and you're not comfortable doing that.

649
00:34:01.855 --> 00:34:04.515
And so she and I worked a lot on me just kind

650
00:34:04.515 --> 00:34:07.795
of making a space and a meeting for her to own it.

651
00:34:08.415 --> 00:34:13.035
Um, and now she's so much better at speaking up

652
00:34:13.195 --> 00:34:15.915
that we can even have in our executive team,

653
00:34:16.025 --> 00:34:18.835
have difficult conversations that are very respectful,

654
00:34:19.165 --> 00:34:22.115
where even she, our quietest leader, um,

655
00:34:22.265 --> 00:34:24.835
will speak her own truth to power.

656
00:34:25.215 --> 00:34:28.875
And I, I could not be happier for that

657
00:34:28.875 --> 00:34:30.275
because that's what I need.

658
00:34:31.865 --> 00:34:34.475
Then also building in three deep overlapping

659
00:34:34.475 --> 00:34:35.715
layers of expertise.

660
00:34:36.215 --> 00:34:40.755
So we work really hard to make sure that no area, um,

661
00:34:41.095 --> 00:34:44.195
in operations across the board, um,

662
00:34:44.495 --> 00:34:48.235
is left without coverage if a leader has to step away, um,

663
00:34:48.265 --> 00:34:49.405
if a leader gets sick.

664
00:34:50.265 --> 00:34:53.645
Um, so, uh, that's taken a lot of work.

665
00:34:53.755 --> 00:34:55.045
It's taken us three years

666
00:34:55.185 --> 00:34:59.805
and we still have, um, some areas that are kind of,

667
00:34:59.805 --> 00:35:00.925
they might be too deep,

00:35:01.225 --> 00:35:05.365
but we want three different people to be able to cover

669
00:35:05.365 --> 00:35:07.645
that area at any given time.

670
00:35:08.465 --> 00:35:11.765
And that builds in a lot of, um, cross training

671
00:35:11.865 --> 00:35:15.245
and collaboration among a team that I think is necessary

672
00:35:15.745 --> 00:35:17.525
to survive in the kind

673
00:35:17.525 --> 00:35:19.365
of challenging times that we're in right now.

674
00:35:20.495 --> 00:35:21.955
And then make sure that the voice

675
00:35:21.975 --> 00:35:25.275
of the customer is represented on executive leadership.

676
00:35:25.975 --> 00:35:29.235
Um, I've seen a lot of executive teams that neglect

677
00:35:29.235 --> 00:35:33.675
to do this, and what happens is they become an echo chamber.

678
00:35:34.175 --> 00:35:38.045
So they don't get that one of their payers is very unhappy

679
00:35:38.115 --> 00:35:40.485
with, you know, this list of problems.

680
00:35:40.945 --> 00:35:42.005
So you've gotta make sure

681
00:35:42.005 --> 00:35:44.725
that you have a feedback loop into that team.

682
00:35:46.705 --> 00:35:48.955
Then. So once I started bringing these,

683
00:35:49.205 --> 00:35:53.315
these just leaders in the, in the rough, um, to the table

684
00:35:53.495 --> 00:35:58.195
and flushing out my executive team, um, I had

685
00:35:58.195 --> 00:35:59.315
to help them understand,

686
00:35:59.315 --> 00:36:03.275
because they hadn't seen a high performing executive team.

687
00:36:03.545 --> 00:36:05.595
They didn't know what it should look like or sound like.

688
00:36:06.295 --> 00:36:08.555
So I set ground rules and expectations.

689
00:36:08.625 --> 00:36:10.195
This is how we're gonna behave in meetings.

690
00:36:10.195 --> 00:36:11.675
This is how we're gonna talk to each other.

691
00:36:12.305 --> 00:36:15.715
They literally had seen their, their prior leaders

692
00:36:16.265 --> 00:36:20.475
screaming, cursing, thumping desks, just a, you know,

693
00:36:20.575 --> 00:36:23.075
an ick factor to, um, the culture.

694
00:36:23.775 --> 00:36:26.795
And many of them had been literally traumatized.

695
00:36:27.175 --> 00:36:29.915
And they still to this day, will talk about the prior trauma

696
00:36:30.615 --> 00:36:32.195
of being under those leaders.

697
00:36:33.175 --> 00:36:35.155
So we had to just agree, this is

698
00:36:35.155 --> 00:36:36.475
what it's gonna sound and look like.

699
00:36:36.655 --> 00:36:38.875
And anytime it got, um,

700
00:36:39.655 --> 00:36:42.115
off about those agreed expectations,

701
00:36:42.295 --> 00:36:43.475
we held each other accountable.

702
00:36:43.695 --> 00:36:47.385
And I tell everybody, Hey, if it's me, please speak up.

703
00:36:47.605 --> 00:36:50.105
Um, if I'm speaking in a tone that you don't know

704
00:36:50.105 --> 00:36:51.185
what I'm really intending,

705
00:36:51.525 --> 00:36:54.345
or that you feel like I'm, uh, dismissing you,

706
00:36:54.445 --> 00:36:56.305
or you've got to tell me.

707
00:36:57.045 --> 00:37:01.345
Um, and then we also allow discussion of what we don't want.

708
00:37:01.765 --> 00:37:05.465
Um, if I were to come in with this highly traumatized staff

709
00:37:05.725 --> 00:37:09.505
and just shut talk down, uh, about the mistakes of the past,

710
00:37:10.325 --> 00:37:12.745
uh, I would've basically been doing something

711
00:37:12.745 --> 00:37:13.945
similar to what they were used to.

712
00:37:14.725 --> 00:37:16.105
So I opened it up,

713
00:37:16.195 --> 00:37:18.265
let's talk about those mistakes of the past.

714
00:37:18.965 --> 00:37:21.385
Um, let's get those, you know, feelings

715
00:37:21.385 --> 00:37:22.425
and thoughts out on the table

716
00:37:22.845 --> 00:37:24.465
and use them as learning opportunities.

717
00:37:25.005 --> 00:37:28.105
Uh, so we didn't shut that conversation down too quickly.

718
00:37:28.745 --> 00:37:30.745
I would say it took about a year for everybody

719
00:37:30.805 --> 00:37:34.225
to really start believing, like, okay, this is different.

720
00:37:34.415 --> 00:37:36.385
This is safe to say what I need to say.

721
00:37:37.675 --> 00:37:39.935
And I would value and model transparency

722
00:37:40.235 --> 00:37:41.895
and ask the leaders to do the same.

723
00:37:42.395 --> 00:37:45.155
Um, I also, you know,

724
00:37:46.405 --> 00:37:47.645
I thank them for what they do.

725
00:37:48.745 --> 00:37:51.645
Um, and when they hold me accountable, I think then,

726
00:37:52.065 --> 00:37:55.565
and I apologize very openly, um, no matter

727
00:37:55.565 --> 00:37:57.485
where I'm at in the executive team

728
00:37:57.545 --> 00:37:59.965
or down to a program with line staff,

729
00:38:00.065 --> 00:38:03.485
if somebody tells me something that they think I'm not doing

730
00:38:04.115 --> 00:38:07.565
correctly, um, I will apologize for that.

731
00:38:07.665 --> 00:38:09.725
I'm, I'm so sorry. That's been your experience.

732
00:38:09.725 --> 00:38:11.285
What do you think I could do to do differently?

733
00:38:11.355 --> 00:38:14.125
What do you need the leadership team to do differently

734
00:38:14.345 --> 00:38:18.045
to support you and then truly recognize

735
00:38:18.145 --> 00:38:19.805
and value divergent thinking?

736
00:38:20.345 --> 00:38:22.485
Um, there are people in this world who don't like change.

737
00:38:22.705 --> 00:38:26.725
I'm not one of them. And I think really good leaders, um,

738
00:38:27.155 --> 00:38:30.365
have to be very open to feedback,

739
00:38:30.365 --> 00:38:32.405
including really harsh and negative feedback.

740
00:38:33.025 --> 00:38:37.365
Um, and you have to be open to ideas that don't fit with

741
00:38:37.365 --> 00:38:40.245
what you thought the direction you were gonna go in, um,

742
00:38:40.455 --> 00:38:42.845
might be 'cause somebody else had a better idea than you.

743
00:38:44.185 --> 00:38:47.975
And then, um, I also would collaborate with, with Luke,

744
00:38:48.075 --> 00:38:50.815
we have at least annual meetings, Luke and I, and,

745
00:38:50.815 --> 00:38:55.455
and our, um, mentor about, um, collaborating

746
00:38:56.115 --> 00:38:59.175
on what they want, what Luke wants the team

747
00:38:59.195 --> 00:39:02.055
to deliver in the upcoming year and years to come.

748
00:39:02.915 --> 00:39:05.855
And so then I take that information back to the team,

749
00:39:05.915 --> 00:39:07.255
and like, here it is.

750
00:39:07.255 --> 00:39:09.455
Here's our goals. You know, let now let's get down

751
00:39:09.455 --> 00:39:12.535
to business and figure out how we reach those goals.

752
00:39:14.855 --> 00:39:16.195
We had to clarify roles

753
00:39:16.195 --> 00:39:18.715
because again, this was an incredibly silo,

754
00:39:19.015 --> 00:39:20.555
um, organization.

755
00:39:21.055 --> 00:39:23.835
So we have used something called the larkey.

756
00:39:24.415 --> 00:39:28.975
We, um, talk about for each, um,

757
00:39:29.705 --> 00:39:33.535
innovation for each task throughout our organization.

758
00:39:34.235 --> 00:39:38.535
We label who's liable, who's accountable, who's responsible,

759
00:39:38.555 --> 00:39:42.855
who contributes to the task, and who needs to stay informed.

760
00:39:43.435 --> 00:39:45.255
And this helps us define our structure.

761
00:39:45.955 --> 00:39:47.975
Um, and it also makes our implementation

762
00:39:48.035 --> 00:39:49.255
highly collaborative.

763
00:39:50.035 --> 00:39:53.295
Um, so we all know what our part is, what our role is

764
00:39:53.295 --> 00:39:56.875
to play next.

765
00:39:57.135 --> 00:40:00.515
Um, I had a company who had been

766
00:40:01.225 --> 00:40:02.515
strangely incentivized.

767
00:40:02.915 --> 00:40:04.475
A lot of people just got a bonus

768
00:40:04.955 --> 00:40:06.115
'cause Luke saw them one day

769
00:40:06.135 --> 00:40:07.595
and he thought, oh, they're doing great.

770
00:40:07.865 --> 00:40:09.355
He'd give him a few thousand dollars.

771
00:40:09.975 --> 00:40:11.635
Or he'd say, if you open this program

772
00:40:12.215 --> 00:40:14.795
and you do this, you get a big, you know, incentive.

773
00:40:15.255 --> 00:40:18.995
And what had happened, uh, and, and totally unintended.

774
00:40:19.185 --> 00:40:22.075
What had happened though was that he meant that

775
00:40:22.075 --> 00:40:24.235
to be a feel good and an incentive for people.

776
00:40:24.665 --> 00:40:26.795
What it did was pit everybody against each other.

777
00:40:27.755 --> 00:40:31.155
'cause it, it mattered if he saw you, um,

778
00:40:31.155 --> 00:40:33.155
literally like laid eyes on you.

779
00:40:33.775 --> 00:40:37.835
Um, so people felt like the incentive programs were, um,

fair, um, didn't make sense to them.

781
00:40:42.255 --> 00:40:44.395
So one of the things that I wanted to make sure

782
00:40:44.785 --> 00:40:48.235
that we did is that we set goals that were consistent

783
00:40:48.295 --> 00:40:51.315
for the company that could be related to any program.

784
00:40:52.215 --> 00:40:55.115
Um, and then we incentivized based on

785
00:40:55.655 --> 00:40:58.715
not only individual performance, but also team performance.

786
00:40:59.415 --> 00:41:02.595
So each year we go through an annual strategic planning.

787
00:41:02.595 --> 00:41:05.635
Like, like most companies do try to stick to three

788
00:41:05.635 --> 00:41:08.195
to five company goals for the next year.

789
00:41:08.855 --> 00:41:13.515
Um, and we have three deep overlap from leadership

790
00:41:13.775 --> 00:41:16.355
on who's sharing, you know, on the larkey,

791
00:41:16.685 --> 00:41:19.515
who's sharing the, the responsibility, the liability,

792
00:41:19.535 --> 00:41:20.635
the accountability, those kind

793
00:41:20.635 --> 00:41:21.835
of things for each of the goals.

00:41:22.655 --> 00:41:25.275
We build those goals into the KPIs.

795
00:41:25.855 --> 00:41:29.835
Um, so each staff member can see which goals

796
00:41:30.485 --> 00:41:32.355
their work rolls up to.

797
00:41:33.465 --> 00:41:35.925
Um, and then amongst leadership,

798
00:41:35.925 --> 00:41:38.685
we have quarterly rocks on mind mapping.

799
00:41:39.305 --> 00:41:43.005
Um, so for each member of the senior leadership team,

800
00:41:43.705 --> 00:41:47.205
we look at the impact on customer, the impact on staff,

801
00:41:47.305 --> 00:41:49.605
the impact on our finances and on operations.

802
00:41:50.185 --> 00:41:55.085
And so for that quarter, we each take, um, responsibility

803
00:41:55.785 --> 00:41:59.845
for, um, again, like objectives, things that have

804
00:41:59.845 --> 00:42:04.685
to occur this quarter to continue our, our work toward the,

805
00:42:04.985 --> 00:42:06.245
um, annual goals.

806
00:42:08.905 --> 00:42:12.685
Uh, so, uh, just gave you a little in the,

807
00:42:12.685 --> 00:42:16.965
in the yellow box there, a little taste of, um,

808
00:42:17.195 --> 00:42:21.725
last year's Q3 rocks for me, um, on staffing

809
00:42:22.305 --> 00:42:23.685
to, um, decide whether

810
00:42:23.685 --> 00:42:25.725
or not we were going to have to per comp.

811
00:42:26.505 --> 00:42:27.885
By the way, we decided not to

812
00:42:27.885 --> 00:42:32.415
because nobody really saw, um, that

813
00:42:32.415 --> 00:42:34.655
that was the way that they wanted to get compensated.

814
00:42:35.315 --> 00:42:39.215
And then we developed a bonus structure for 2025, um,

815
00:42:40.115 --> 00:42:43.575
on the customers rolling out annual core values training.

816
00:42:44.155 --> 00:42:48.335
Um, in this way, uh, we were, um,

817
00:42:49.085 --> 00:42:51.855
preparing our staff to deliver to our members

818
00:42:52.435 --> 00:42:55.535
on the core values in operations.

819
00:42:56.235 --> 00:42:58.415
Uh, we individualized our treatment

820
00:42:58.415 --> 00:43:00.095
and transition plans that actually rolled

821
00:43:00.125 --> 00:43:01.215
into this year as well.

822
00:43:01.495 --> 00:43:02.655
'cause we had a lot of work to do there.

823
00:43:03.115 --> 00:43:06.375
And then finance clarifying, uh, accounts.

824
00:43:07.235 --> 00:43:12.095
Um, we were left, uh, when we, uh, helped the

825
00:43:12.705 --> 00:43:15.815
prior, um, VP of finance to exit.

826
00:43:16.395 --> 00:43:19.215
Um, we were left with a huge mess and clean up.

827
00:43:19.635 --> 00:43:22.055
And as we brought someone in to help us with that,

828
00:43:22.235 --> 00:43:26.655
it took her quite a while, um, to, to even get our accounts,

829
00:43:27.035 --> 00:43:29.095
um, in an understandable format

830
00:43:29.485 --> 00:43:31.615
that we could share in with audits.

831
00:43:31.675 --> 00:43:33.815
So that's just a little picture of

832
00:43:33.815 --> 00:43:38.515
what I was doing last year in Q3 related to the bonus.

833
00:43:38.935 --> 00:43:41.675
And we had lots of discussion about

834
00:43:42.385 --> 00:43:44.475
what were we incentivizing.

835
00:43:45.335 --> 00:43:47.195
So here I have this fractured company

836
00:43:47.325 --> 00:43:49.915
where it felt like people got all these little individual,

837
00:43:50.655 --> 00:43:53.155
um, kudos or not, um,

838
00:43:53.695 --> 00:43:55.755
and that they weren't given consistently.

839
00:43:56.215 --> 00:43:59.675
So I had a company that didn't work well together

840
00:43:59.975 --> 00:44:02.315
as a team either at the program level,

841
00:44:02.455 --> 00:44:04.435
and they didn't know how to work as leaders either.

842
00:44:05.455 --> 00:44:09.795
So I really encouraged our senior leadership team,

843
00:44:10.415 --> 00:44:14.955
um, to consider that it's team performance,

844
00:44:15.015 --> 00:44:17.955
at least half of a person's bonus is based on their

845
00:44:18.255 --> 00:44:19.435
team's performance.

846
00:44:20.215 --> 00:44:23.955
Um, and then half of that is if we reached company goals

847
00:44:24.495 --> 00:44:27.635
and the other half was reaching their teams or their program

848
00:44:27.815 --> 00:44:32.445
or department goals, then each year on their annual job

849
00:44:32.445 --> 00:44:33.565
performance evaluation,

850
00:44:33.835 --> 00:44:36.445
they could also get an individual merit increase.

851
00:44:37.225 --> 00:44:38.805
And we budgeted those things in.

852
00:44:41.535 --> 00:44:44.505
Another thing that we do, uh, along the way to measure

853
00:44:44.805 --> 00:44:47.825
how we're doing, um, as we continue to change our culture,

854
00:44:48.205 --> 00:44:49.345
is quarterly checks.

855
00:44:50.045 --> 00:44:52.305
So we do this at the senior leadership level,

856
00:44:52.605 --> 00:44:55.985
and we do it at the, um, program leadership level as well.

857
00:44:56.565 --> 00:44:57.585
And we do it with them.

858
00:44:58.045 --> 00:45:02.825
So we, we use SWOT analysis and pestle analysis, um,

859
00:45:03.005 --> 00:45:05.745
and then leap model, which is what you see here, which is

860
00:45:06.375 --> 00:45:10.545
kind of looking at the, um, the intersection

861
00:45:10.655 --> 00:45:15.265
between being an efficient team and an effective team.

862
00:45:16.175 --> 00:45:19.395
And, uh, looking at what quadrant we land in

863
00:45:19.735 --> 00:45:21.835
and what quadrants we want to be in.

864
00:45:22.495 --> 00:45:26.395
Um, so the ultimate is obviously being highly effective

865
00:45:26.395 --> 00:45:27.435
and highly efficient.

866
00:45:28.015 --> 00:45:30.075
And I will tell you, we had a lot

867
00:45:30.075 --> 00:45:32.635
of teams the first few times we went through this

868
00:45:33.225 --> 00:45:35.835
that were in the loft or astray quadrants.

869
00:45:35.975 --> 00:45:37.515
So we had a lot of work to do.

870
00:45:37.975 --> 00:45:41.075
And a lot of it was, um, we needed leaders

871
00:45:41.695 --> 00:45:43.995
and we needed to, to grow our leaders.

872
00:45:45.055 --> 00:45:49.235
So, um, we also looked at how our teams were,

873
00:45:49.645 --> 00:45:53.515
where they were in being high performing teams.

874
00:45:53.735 --> 00:45:55.995
And this chart kind of walks you through that.

875
00:45:56.855 --> 00:46:01.235
Um, it's, it's pretty common to when you come into

876
00:46:03.595 --> 00:46:05.995
absolutely overhauling a, a structure,

877
00:46:06.415 --> 00:46:09.635
an organizational structure that you may have

00:46:10.905 --> 00:46:12.305
multiple teams that are forming.

879
00:46:12.775 --> 00:46:15.465
They aren't even too norming yet.

880
00:46:15.465 --> 00:46:17.905
They're just, they're trying to figure out,

881
00:46:17.905 --> 00:46:18.905
what the heck am I doing here?

882
00:46:19.695 --> 00:46:21.065
Then they begin storming.

883
00:46:21.205 --> 00:46:22.785
So people start trying

884
00:46:22.845 --> 00:46:25.705
to figure out their place on the team.

885
00:46:25.705 --> 00:46:27.185
They're really not working together.

886
00:46:27.695 --> 00:46:29.025
They might butt hugs a lot.

887
00:46:29.825 --> 00:46:32.905
I had a whole company that was in storming mode

888
00:46:34.165 --> 00:46:35.385
to get them to norming.

889
00:46:35.385 --> 00:46:39.265
Took about a year, um, where you could see the potential.

890
00:46:39.525 --> 00:46:42.185
We were trying to improve performance,

891
00:46:42.355 --> 00:46:44.065
we're getting more clear on our values.

892
00:46:44.925 --> 00:46:46.545
And then last year,

893
00:46:46.925 --> 00:46:50.105
I'd say we really had not only a senior leadership team

894
00:46:50.105 --> 00:46:52.625
that was a real team, but also multiple

895
00:46:52.645 --> 00:46:56.265
of our programs were coming together, um, to be real teams.

896
00:46:56.965 --> 00:47:00.345
And each quarter we would have the program director

897
00:47:00.345 --> 00:47:04.225
and the regional director point to where on this, um,

898
00:47:04.355 --> 00:47:06.705
chart do you think your team's at right now?

899
00:47:07.465 --> 00:47:11.005
And I would say the, the best leaders were the most honest.

900
00:47:11.705 --> 00:47:14.325
The leaders who didn't really understand it, oh,

901
00:47:14.415 --> 00:47:15.445
we're high performing.

902
00:47:15.705 --> 00:47:18.485
And I'm like, well, I wish we were.

903
00:47:20.225 --> 00:47:23.325
Uh, I can say that, that on any given day,

904
00:47:23.325 --> 00:47:25.125
sometimes we're performing and,

905
00:47:25.185 --> 00:47:27.245
and on the senior leadership, we have moments

906
00:47:27.345 --> 00:47:29.400
of high performance, but we're not all the, the way there

907
00:47:29.425 --> 00:47:30.685
and it's not a constant.

908
00:47:31.385 --> 00:47:34.685
Um, but we really didn't have any of our programs that were

909
00:47:34.705 --> 00:47:36.445
yet at high performing teams

910
00:47:36.445 --> 00:47:40.045
because as it shows here, it's extremely rare to get there.

911
00:47:40.105 --> 00:47:41.285
And even once you get there,

912
00:47:41.715 --> 00:47:44.085
it's not like you rest on your laurels and stay there.

913
00:47:46.855 --> 00:47:50.995
So now I have a senior leadership team that is, uh,

914
00:47:51.025 --> 00:47:52.355
rocking and rolling together.

915
00:47:53.135 --> 00:47:57.195
Um, and we have flashes of brilliance,

916
00:47:57.655 --> 00:47:59.355
and at least most of the time we're,

917
00:47:59.365 --> 00:48:02.195
we're definitely a norming team.

918
00:48:02.975 --> 00:48:04.315
Um, so

919
00:48:04.415 --> 00:48:07.955
to sustain when you get the high performing team status,

920
00:48:08.135 --> 00:48:11.675
and then to replicate that success, you gotta plan ahead

921
00:48:11.695 --> 00:48:13.195
and you gotta nurture that.

922
00:48:13.535 --> 00:48:16.635
So some ways we do that is we have daily huddles.

923
00:48:16.865 --> 00:48:19.315
Each morning get on the call with all the senior readers.

924
00:48:19.695 --> 00:48:21.515
We walk through what's important in our day,

925
00:48:21.515 --> 00:48:23.395
what's important for everybody to know about

926
00:48:23.425 --> 00:48:24.835
what each other's working on.

927
00:48:24.985 --> 00:48:28.915
Because again, we are so three deep in most areas

928
00:48:29.585 --> 00:48:31.515
that if I'm working on something,

929
00:48:31.975 --> 00:48:34.155
it affects at least two other people.

930
00:48:35.525 --> 00:48:37.625
We have weekly executive leadership meetings

931
00:48:37.625 --> 00:48:41.385
where we review our, um, rocks frequently.

932
00:48:41.605 --> 00:48:43.865
We, we have items for problem solving

933
00:48:43.965 --> 00:48:45.945
and items for information to share.

934
00:48:46.825 --> 00:48:50.245
And we always, in that leadership meeting, um,

935
00:48:50.265 --> 00:48:54.285
if we've made a decision, we immediately make a decision on

936
00:48:54.425 --> 00:48:56.245
how are we going to communicate this

937
00:48:56.425 --> 00:48:57.445
to the rest of the company.

938
00:48:58.995 --> 00:49:01.775
We then do our quarterly rocks review, which we just did

939
00:49:01.775 --> 00:49:04.455
as a senior leadership last week.

940
00:49:05.075 --> 00:49:07.535
Um, and then we also take that,

941
00:49:07.675 --> 00:49:11.215
and I'm at a, a retreat right now with our program directors

942
00:49:11.215 --> 00:49:13.375
and regional directors where we take

943
00:49:13.645 --> 00:49:15.735
what we did in executive leadership,

944
00:49:16.025 --> 00:49:19.215
which was strategic planning, and we bring it to this level

945
00:49:19.275 --> 00:49:22.615
and ask for their input, explain why we chose these goals.

946
00:49:23.235 --> 00:49:25.455
Um, and then just also updating where we're at

947
00:49:25.485 --> 00:49:27.535
with some major initiatives and,

948
00:49:27.755 --> 00:49:29.615
and processes that are changing.

949
00:49:31.075 --> 00:49:33.855
We have an annual budget process that is transparent.

950
00:49:34.705 --> 00:49:36.535
Every department takes part.

951
00:49:37.315 --> 00:49:40.215
Um, each of them have a piece of the budget that is theirs

952
00:49:40.365 --> 00:49:42.615
that they review with the VP of finance.

953
00:49:42.845 --> 00:49:44.815
They get input on the things they need.

954
00:49:45.515 --> 00:49:49.295
And, um, you know, we ask them to align with our

955
00:49:49.975 --> 00:49:51.335
strategic goals for the next year.

956
00:49:52.035 --> 00:49:54.735
Um, so, so they kind of know what it is

957
00:49:54.735 --> 00:49:55.775
that, that we're doing.

958
00:49:56.275 --> 00:49:59.255
Um, with our budgeting process prior to this,

959
00:49:59.445 --> 00:50:03.095
they had never, ever known the budget for the company

960
00:50:03.595 --> 00:50:06.775
or how their department, um, contributed.

961
00:50:07.595 --> 00:50:11.055
Nobody knew, even those that ended up on my, uh,

962
00:50:11.085 --> 00:50:13.855
executive leadership team had never seen it.

963
00:50:15.115 --> 00:50:17.255
Um, we have retreats like we're at today.

964
00:50:18.035 --> 00:50:21.935
Um, very important in getting the middle managers

965
00:50:21.935 --> 00:50:25.615
and the program directors feeling very much a part

966
00:50:25.675 --> 00:50:28.685
of the process of budgeting

967
00:50:28.945 --> 00:50:32.965
and strategic, um, planning for the upcoming year.

968
00:50:33.105 --> 00:50:36.885
And then usually in April, we then start in like,

969
00:50:36.885 --> 00:50:38.605
here, remember, here's our goals.

970
00:50:38.785 --> 00:50:40.005
How are we doing towards them?

971
00:50:41.105 --> 00:50:44.725
We also have leadership coaching from our mind map mentor.

972
00:50:45.425 --> 00:50:48.325
Um, he, it, it's continuous with the team.

973
00:50:48.945 --> 00:50:51.845
Um, but he also, uh, has individual meetings with,

974
00:50:51.875 --> 00:50:56.015
with all the leaders in the company, career path development

975
00:50:56.155 --> 00:50:57.415
and succession planning.

976
00:50:57.915 --> 00:51:01.335
Um, I'm so happy this, this retreat that I'm in.

977
00:51:02.195 --> 00:51:05.135
Um, here we are year three of me being here.

978
00:51:06.035 --> 00:51:09.895
And I would say 75% of the people in the room

979
00:51:10.715 --> 00:51:14.575
are going back to school for a degree that relates

980
00:51:14.595 --> 00:51:16.615
to something they want to do with this company.

981
00:51:17.595 --> 00:51:20.895
And several of them, when I ask them what they're most proud

982
00:51:20.895 --> 00:51:25.015
of with their teams for this quarter, mentioned multiple

983
00:51:25.115 --> 00:51:29.095
of their staff also going to school to get them

984
00:51:29.095 --> 00:51:32.735
to the next step of their career paths with this company.

985
00:51:33.515 --> 00:51:36.295
So, um, it's really cool, uh, to watch

986
00:51:36.295 --> 00:51:37.495
that starting to blossom.

987
00:51:38.835 --> 00:51:40.255
The other thing that we do is keep

988
00:51:40.295 --> 00:51:41.415
a lessons learned document.

989
00:51:41.675 --> 00:51:43.455
It is just an ongoing document.

990
00:51:44.155 --> 00:51:46.335
Um, so if I had to close a program,

991
00:51:47.255 --> 00:51:49.175
I write down everything we learned from it.

992
00:51:49.555 --> 00:51:50.815
If we're opening a program

993
00:51:51.155 --> 00:51:53.455
and we did it poorly, we, we,

994
00:51:53.675 --> 00:51:55.735
we did not hit the mark like

995
00:51:55.735 --> 00:51:56.775
we thought we would with our ramp.

996
00:51:57.515 --> 00:51:59.655
I'm writing everything we learned, um,

997
00:52:00.235 --> 00:52:02.695
and just, just I go through the year that way

998
00:52:02.875 --> 00:52:04.455
and I share that with, um,

999
00:52:04.595 --> 00:52:06.255
the senior leadership team at all times.

1000
00:52:08.965 --> 00:52:10.665
And then as we look

1001
00:52:10.665 --> 00:52:14.265
to replicate those high performing leaders, um, one

1002
00:52:14.265 --> 00:52:18.225
of the things that we did last year is decide, um,

1003
00:52:19.045 --> 00:52:21.625
our program directors don't even know when we say,

1004
00:52:21.765 --> 00:52:22.985
are you a high performing team?

1005
00:52:22.985 --> 00:52:24.425
They don't know what we mean by that.

1006
00:52:25.445 --> 00:52:28.625
So what we did is the, the, um,

1007
00:52:28.935 --> 00:52:30.745
blindfolded people trying

1008
00:52:30.745 --> 00:52:33.345
to describe an elephant from touching different parts of it.

1009
00:52:33.725 --> 00:52:37.145
We had the executive team, each of them like hr.

1010
00:52:37.325 --> 00:52:41.025
Here's what I think when I see a high performing leader, um,

1011
00:52:41.195 --> 00:52:43.065
admissions, this is what I look for.

1012
00:52:43.065 --> 00:52:45.305
Those program directors are very collaborative.

1013
00:52:45.615 --> 00:52:46.945
They help us with outreach.

1014
00:52:47.045 --> 00:52:49.825
And we went through each department, um,

1015
00:52:50.005 --> 00:52:51.905
that's represented on senior leadership

1016
00:52:52.525 --> 00:52:56.625
and then made a, um, kind of like a report card.

1017
00:52:56.805 --> 00:52:59.425
So we defined what high performance was,

1018
00:53:00.325 --> 00:53:02.065
and then we developed a report card

1019
00:53:02.065 --> 00:53:06.065
that now we review quarterly, um, with, uh,

1020
00:53:06.205 --> 00:53:07.225
the program director.

1021
00:53:07.225 --> 00:53:09.825
Each program director gets 30 to 45 minutes

1022
00:53:09.825 --> 00:53:12.745
with us each quarter to review their data

1023
00:53:13.085 --> 00:53:14.465
and qualitative feedback.

1024
00:53:15.775 --> 00:53:17.705
They also get to tell us,

1025
00:53:17.735 --> 00:53:19.265
this is the support I need from you.

1026
00:53:20.535 --> 00:53:22.875
And then they also tell us, Hey, here's

1027
00:53:22.875 --> 00:53:24.555
where your senior leadership is doing

1028
00:53:24.555 --> 00:53:25.605
great, and here's where you're not.

1029
00:53:26.505 --> 00:53:28.445
Um, and it's so important

1030
00:53:28.465 --> 00:53:30.485
to have them in the feedback loop to us.

1031
00:53:31.445 --> 00:53:35.045
'cause again, um, we wouldn't know if they didn't tell us,

1032
00:53:35.185 --> 00:53:36.645
we think we're given all the support,

1033
00:53:36.785 --> 00:53:38.685
but it might be misdirected not

1034
00:53:38.685 --> 00:53:39.725
what they want in the moment.

1035
00:53:40.545 --> 00:53:43.965
Um, we might be talking out of two sides of the team,

1036
00:53:44.305 --> 00:53:45.925
giving them different feedback.

1037
00:53:46.225 --> 00:53:50.005
And so, and I did hear that this past year that like, hey,

1038
00:53:50.025 --> 00:53:53.485
you guys aren't in ation kind of moving together as a team.

1039
00:53:54.305 --> 00:53:56.725
We need to know that if I ask you the answer

1040
00:53:56.725 --> 00:53:58.525
to this question and you the answer to this question,

1041
00:53:58.835 --> 00:54:03.145
that we'll get a consistent answer all.

1042
00:54:04.145 --> 00:54:08.345
I think I almost hit my 55 minute mark, um, Corey,

1043
00:54:08.405 --> 00:54:09.905
but now we're at question and answer.

1044
00:54:12.645 --> 00:54:13.945
Dr. Dixon, thank you very much.

1045
00:54:14.225 --> 00:54:15.665
I actually have a a couple questions,

1046
00:54:15.685 --> 00:54:16.945
but, uh, for those of you are on the line,

1047
00:54:16.945 --> 00:54:17.785
if you have a question, please

1048
00:54:17.785 --> 00:54:18.945
submit them in the question box.

1049
00:54:19.205 --> 00:54:22.705
Um, a lot of this seems to be about ballots, so some

1050
00:54:22.705 --> 00:54:24.665
of my questions are gonna go down that road.

1051
00:54:25.165 --> 00:54:28.625
How do you balance, uh, things like radical transparency

1052
00:54:28.845 --> 00:54:31.145
and with, uh, any possibility

1053
00:54:31.205 --> 00:54:33.385
or any, uh, possible vulnerabilities that

1054
00:54:33.385 --> 00:54:35.345
that may bring up individually with the authority

1055
00:54:35.365 --> 00:54:37.585
and strong direction that the team needs?

1056
00:54:38.575 --> 00:54:41.995
Yes, that's a, a great question. And it's, it's not easy.

1057
00:54:42.335 --> 00:54:44.475
Um, it, you're living in the gray.

1058
00:54:45.175 --> 00:54:48.395
Um, so a lot of people prefer black or white.

1059
00:54:48.895 --> 00:54:52.635
Um, and actually a lot of the leadership

1060
00:54:52.735 --> 00:54:55.475
and a lot of the stuff that we do is in the gray.

1061
00:54:56.335 --> 00:54:58.595
Um, part of it is modeling

1062
00:54:59.495 --> 00:55:02.195
and truly having that servant leadership mindset.

1063
00:55:02.715 --> 00:55:07.595
I, I make sure that I encourage people to speak up.

1064
00:55:07.615 --> 00:55:10.595
And when they do, I thank them for speaking up,

1065
00:55:10.595 --> 00:55:12.915
even if I think they had a horrible idea.

1066
00:55:13.845 --> 00:55:15.275
Thank you for speaking up.

1067
00:55:15.685 --> 00:55:17.955
Thank you for giving us that to consider.

1068
00:55:18.535 --> 00:55:22.395
We will then feedback to you what the decision was.

1069
00:55:22.815 --> 00:55:26.195
Um, do you have ideas on how to make those things happen

1070
00:55:27.025 --> 00:55:31.165
and, and really drilling down so it isn't just a cursory,

1071
00:55:31.625 --> 00:55:35.925
you know, thankfully the idea, it, it's truly like, um,

1072
00:55:36.125 --> 00:55:37.605
I I've assigned people,

1073
00:55:38.165 --> 00:55:39.925
I don't know enough about what you just said.

1074
00:55:40.145 --> 00:55:42.525
Can you, you know, write something up

1075
00:55:42.525 --> 00:55:45.645
or can we schedule time for you to go in more depth with me

1076
00:55:45.785 --> 00:55:48.685
or with your supervisor and, and bubble it up?

1077
00:55:49.505 --> 00:55:54.165
Um, so again, I think a lot of it is modeling and,

1078
00:55:54.165 --> 00:55:55.725
and setting expectations.

1079
00:55:56.745 --> 00:55:59.285
Um, again, we had a very traumatized,

1080
00:55:59.745 --> 00:56:01.965
not just in the workforce, in the workplace,

1081
00:56:02.585 --> 00:56:06.445
but the kind of people that do our work, um, tend to have

1082
00:56:07.115 --> 00:56:08.325
high trauma backgrounds.

1083
00:56:08.905 --> 00:56:10.645
So we also brought in a, a,

1084
00:56:11.685 --> 00:56:15.325
a consultant on trauma empowerment to, to

1085
00:56:16.005 --> 00:56:18.365
actually do some trauma empowering work with them

1086
00:56:18.905 --> 00:56:22.925
and also to, to teach us as an organization how to be very,

1087
00:56:23.265 --> 00:56:27.805
um, not only trauma informed, but setting the tone

1088
00:56:27.865 --> 00:56:30.085
and a culture that allows people

1089
00:56:30.225 --> 00:56:33.805
to release those old responses to trauma and, and,

1090
00:56:34.385 --> 00:56:36.205
and grow with the company in a better way.

1091
00:56:36.265 --> 00:56:39.325
And not everybody does. Some people just can't get there

1092
00:56:39.945 --> 00:56:42.005
and no matter how much we work at it,

1093
00:56:42.385 --> 00:56:44.045
and they, they have opted out,

1094
00:56:44.425 --> 00:56:47.605
but our retention rates are incredibly high at this point.

1095
00:56:48.205 --> 00:56:50.365
I think last time I looked it was, um,

1096
00:56:50.635 --> 00:56:54.485
78% at one point last quarter.

1097
00:56:54.745 --> 00:56:59.565
So we went from about a 35% retention rate when I came in

1098
00:56:59.705 --> 00:57:00.965
to 78%.

1099
00:57:01.385 --> 00:57:05.245
So I, I think a lot of that comes from feeling safe

1100
00:57:05.785 --> 00:57:06.965
to truly speak.

1101
00:57:08.775 --> 00:57:10.825
Well, that, that you may have answered.

1102
00:57:11.005 --> 00:57:12.425
I'm gonna ask this question anyways, though.

1103
00:57:12.425 --> 00:57:13.465
You may have just answered it.

1104
00:57:14.065 --> 00:57:15.525
Uh, it sounds like there's a lot of changes.

1105
00:57:15.625 --> 00:57:16.885
You guys are doing a lot of stuff,

1106
00:57:16.905 --> 00:57:19.725
and it is pretty radical shift of what you did before.

1107
00:57:20.145 --> 00:57:23.325
Mm-hmm. How any advice on how somebody would unroll, uh,

1108
00:57:23.425 --> 00:57:26.085
unroll that into their company without overwhelming the

1109
00:57:26.185 --> 00:57:30.485
staffs with how big a cultural change this is?

1110
00:57:31.575 --> 00:57:33.135
Pacing, pacing, pacing.

1111
00:57:33.755 --> 00:57:34.975
Um, and,

1112
00:57:35.035 --> 00:57:37.495
and sometimes I've had to slow the role

1113
00:57:37.955 --> 00:57:39.375
of even our, our mentor.

1114
00:57:39.915 --> 00:57:42.895
Um, he got out ahead of me one time with a change

1115
00:57:42.895 --> 00:57:45.695
that we were not ready to actually implement.

1116
00:57:46.075 --> 00:57:48.375
And it created a lot of confusion.

1117
00:57:49.235 --> 00:57:51.335
So we came back with senior leadership

1118
00:57:51.335 --> 00:57:53.335
and just had one of those hard discussions like, Hey,

1119
00:57:53.525 --> 00:57:54.775
dude, we weren't ready for that.

1120
00:57:55.795 --> 00:57:59.615
And now here's what the unintended outcomes, you know, were,

1121
00:58:00.395 --> 00:58:01.415
um, and,

1122
00:58:01.515 --> 00:58:04.895
and a lot

1123
00:58:04.955 --> 00:58:06.935
of the pacing I have in my head,

1124
00:58:07.155 --> 00:58:10.535
and I'll tell you, I am not excellent at bringing the team

1125
00:58:10.605 --> 00:58:13.655
into my, my meta thoughts.

1126
00:58:14.115 --> 00:58:15.735
Um, and they give me that feedback.

1127
00:58:15.755 --> 00:58:19.215
So I try really hard to communicate more.

1128
00:58:19.795 --> 00:58:24.455
Um, but also listen, when everybody's saying, Hey,

1129
00:58:24.515 --> 00:58:28.535
we just had a huge rollout on treatment planning, um,

1130
00:58:28.675 --> 00:58:31.815
and change documents and all our processes

1131
00:58:31.835 --> 00:58:33.575
and stuff, we are not ready

1132
00:58:34.195 --> 00:58:36.615
to now have another big initiative

1133
00:58:36.715 --> 00:58:38.535
for the recovery model until January.

1134
00:58:39.355 --> 00:58:41.855
And just listening to the team, like, okay,

1135
00:58:42.225 --> 00:58:43.575
we're still gonna make this change,

1136
00:58:43.795 --> 00:58:47.135
but we're gonna make it at a pace that feels sustainable.

1137
00:58:49.705 --> 00:58:51.635
Well, excellent. Well, we got about a minute left,

1138
00:58:51.895 --> 00:58:55.595
Dr. Dixon, any final words of, uh, wisdom

1139
00:58:55.735 --> 00:58:59.515
for our audience on how they take their organization,

1140
00:58:59.515 --> 00:59:00.875
their leadership structures, their,

1141
00:59:00.895 --> 00:59:03.355
and quite frankly, this is not just your leadership team.

1142
00:59:03.375 --> 00:59:07.435
You have explained, uh, organizational wide cultural shift.

1143
00:59:08.055 --> 00:59:09.515
Uh, any, any final advice?

1144
00:59:10.975 --> 00:59:15.235
Um, um, listen, ask questions,

1145
00:59:15.915 --> 00:59:18.625
listen some more, and don't be afraid

1146
00:59:18.645 --> 00:59:22.605
to make hard decisions, um, particularly, uh, about people.

1147
00:59:23.385 --> 00:59:27.765
Um, we could not, not have got where we are

1148
00:59:28.035 --> 00:59:29.365
with the previous leaders.

1149
00:59:30.025 --> 00:59:31.565
Um, it would've been an uphill battle

1150
00:59:31.585 --> 00:59:33.765
and we would've never got to the, the goals

1151
00:59:33.795 --> 00:59:35.685
that we've attained so far.

1152
00:59:38.975 --> 00:59:41.505
Well, Dr. Dixon, thank you again

1153
00:59:41.925 --> 00:59:44.585
and, uh, I'm gonna do my little going away blurb myself.

1154
00:59:44.665 --> 00:59:46.345
I want to thank everybody for joining us

1155
00:59:46.405 --> 00:59:47.905
and just to remind everybody, the slides

1156
00:59:47.905 --> 00:59:50.105
and the recording for this will be posted on the Open Minds

1157
00:59:50.105 --> 00:59:51.145
website starting tomorrow.

1158
00:59:51.285 --> 00:59:53.785
And I invite you to enjoy, uh, to join me next week

1159
00:59:54.205 --> 00:59:56.785
for our next round table, a great consumer experience

1160
00:59:57.005 --> 00:59:58.065
and increased revenue,

1161
00:59:58.245 --> 01:00:01.225
the Avita Behavioral Health Crisis Center case study.

1162
01:00:01.725 --> 01:00:03.825
You can register for that or look at our full calendar

1163
01:00:03.825 --> 01:00:06.425
of events on the executive round tables page,

1164
01:00:06.425 --> 01:00:09.465
located@www.open minds.com.

1165
01:00:09.845 --> 01:00:11.065
Dr. Dixon, thank you very much.

1166
01:00:11.185 --> 01:00:12.465
I hope you have a wonderful weekend.

1167
01:00:13.035 --> 01:00:14.185
Thank you, Corey. Thank you.