

STRATEGY PROFILE

Leadership ▶ Strategy ▶ Innovation
▶ Culture ▶ Performance



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ABOUT CTI

OUR STORY

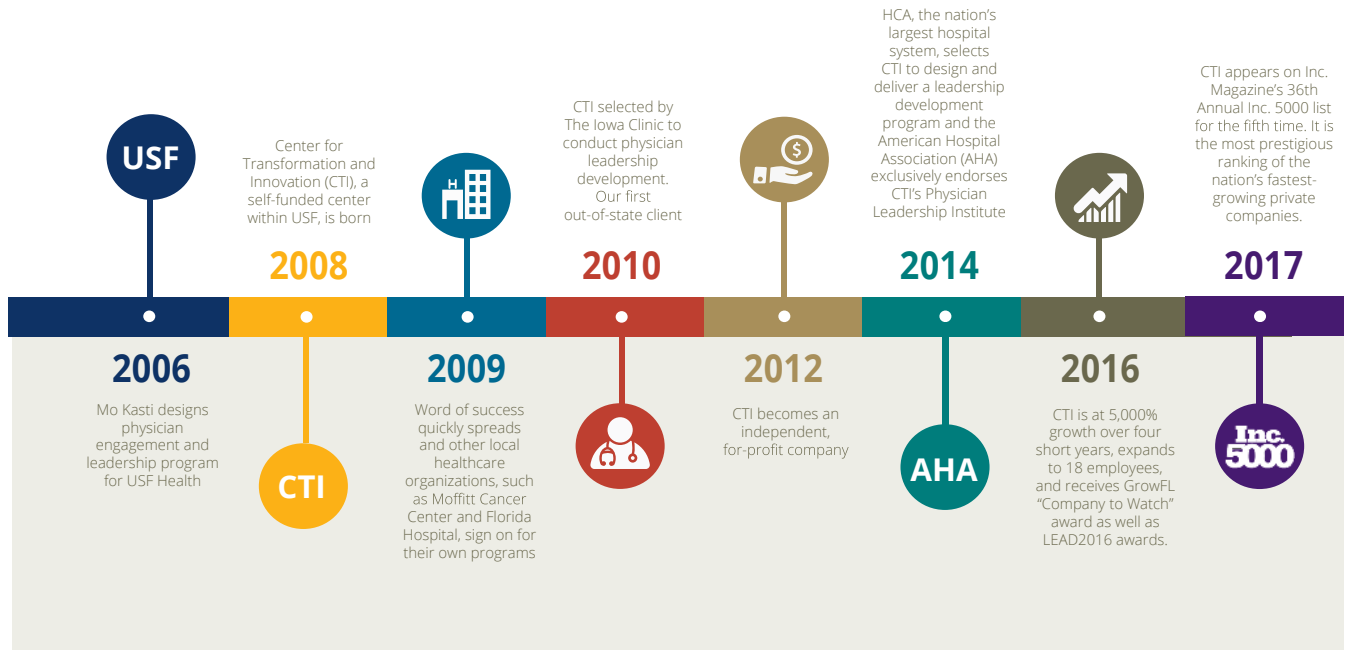
CTI was created in 2005 as part of USF Health at the University of South Florida. CTI's mission was to accelerate the transformation of how healthcare is delivered and understood.

Our initial purpose was to serve as a transformation resource for the physician leaders of USF Health. However, CTI's reputation quickly spread and we began offering our solutions to organizations outside of the university.

In 2008, CTI began operating as a stand-alone entrepreneurial entity. Since then, we've grown by more than 5,000 percent,

and our client base has expanded across the country and internationally. As a result, on July 1, 2012, CTI took the next step and became an independent company (LLC) with the same mission to transform organizations and leaders.

At CTI we form long-term working partnerships with our clients to achieve success through five foundational practices – leadership, strategy, culture, innovation, and performance.



OUR PEOPLE

Our team consists of the most qualified coaches, facilitators, curriculum designers, operations specialists and technical/support staff. Our subject-matter experts range from nationally renowned healthcare futurists and economists, to industry and business leaders. Our faculty members represent universities such as Duke, USF, Emory, and West Point.

Every member of the team is committed to helping organizations provide better services at lower costs, while being deeply passionate about maintaining the highest quality of service.

OUR VALUES

CTI team members commit to upholding the same values and behaviors we impart on our clients.

We believe that *authenticity, leadership, innovation, partnership and results* are at the foundation of our work ethic and we encourage our clients to embrace these values as well.

MO KASTI, CEO & FOUNDER



Mo, a leader in organizational transformation, is the CEO and founder of CTI.

With more than 25 years of experience with industries undergoing disruption, Mo has worked with hundreds of leaders and businesses to transform their organizational cultures.

Mo's previous roles include the Chief Transformation Officer and Chief Operating Officer (COO) for USF Health where he integrated the Colleges of Medicine, Nursing, Public Health, and the 400-member Physician Group into USF Health, an entrepreneurial academic model with \$750 million in revenue. Prior to joining USF, Mo held successful leadership roles with General Electric Healthcare (NYSE: GE).

Mo has a Master of Science degree in Biomedical Engineering and Healthcare Administration from Case Western Reserve University and has earned numerous awards as a coach, trainer, and speaker on leadership development. He is certified as a Master Black Belt (MBB) in Lean Six Sigma and Master Change Agent (MCA) in Change Management.

Mo has faculty appointments in the USF College of Medicine, College of Nursing, College of Engineering, Business School, Honor College, and College of Pharmacy. He has received numerous management awards for outstanding performance and holds several patents. He is a sought-after speaker on strategy, leadership and management transformation, innovation, and effective process improvement.

AWARDS & RECOGNITION



**Inc.
5000**



INC 5000

CTI appeared on Inc. Magazine's 36th annual Inc. 5000, the most prestigious ranking of the nation's fastest-growing private companies - 2017. This is CTI's fifth time ranking on the list, an honor given to only 7% of companies.

SMALL BUSINESS OF THE YEAR

CTI Named Small Business of the Year Finalist Top Five - 2016

LEAD AWARDS

- Top 10 Leadership Partner
- Top 10 Best Executive Coaching Program
- Top 10 Use of Team Building

STATE OF FLORIDA HEALTHCARE INNOVATION AWARD

FLORIDA COMPANIES TO WATCH 2015

Awarded by GrowFL

THE AMERICAN HOSPITAL ASSOCIATION

exclusively endorsed Physician Leadership Training and Development Services from The Physician Leadership Institute™(PLI). - 2015 & 2016

HOW WE ACHIEVE TRANSFORMATION

CTI is a transformation company. We partner with clients to achieve success through five foundational practices – *leadership, strategy, culture, innovation, and performance.*



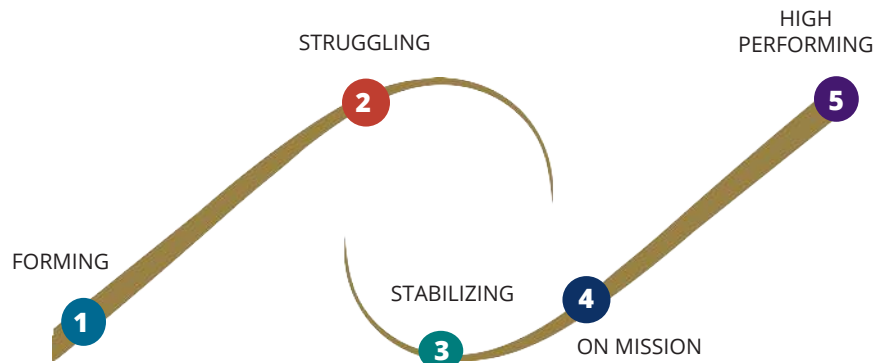
OUR CUSTOMIZED APPROACH

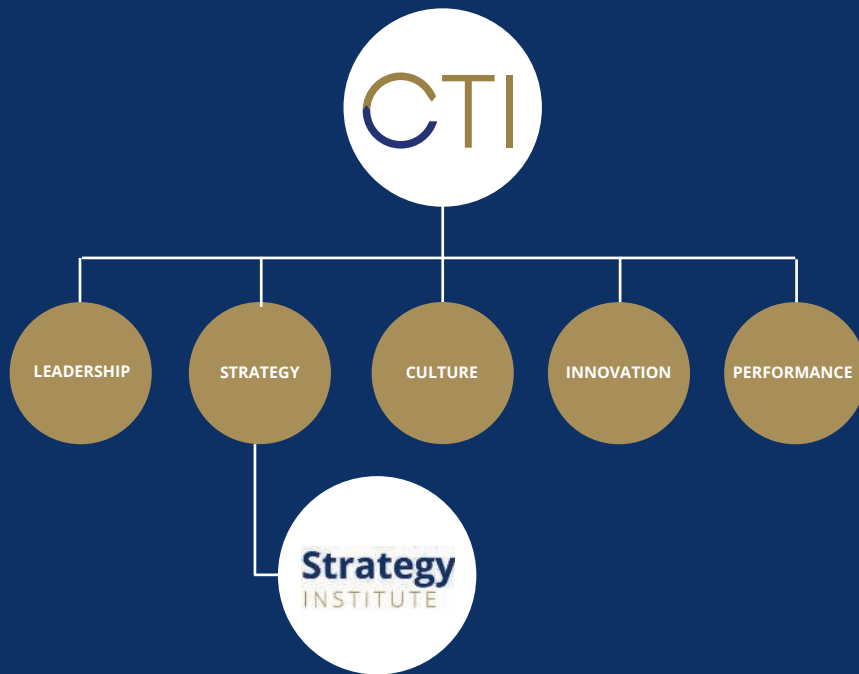
Using our exclusive terrain-based approach, CTI supports its clients from the beginning of transformation to fruition - by assessing the terrain, mapping the strategy, aligning and engaging, executing and sustaining the changes.



WHY WE'RE DIFFERENT

We know each of our client partners has a distinct mission and vision, varying budgets, time constraints, a unique culture, and different desired outcomes. In addition, we believe every physician and leader has different strengths and development areas. Therefore, there is no "off-the-shelf" solution that can meet the unique needs of every organization. CTI offers a continuum of custom programs that deliver the maximum return on investment for the organization as a whole.





We work specifically with the following individuals: Executive Teams, Boards, Chiefs of Staff, Strategy Committees, CFOs, CEOs, COOs, Staff

“I had the pleasure of working with Mo Kasti and CTI as we reviewed work completed for Tampa International Airport in 2012. As I prepared for the review, I realized how forward-thinking the process utilized by Mo and his team was, and how foundational work completed five years prior, was still relevant and a driving force in our business today. It is rare, in my opinion, for strategic work to stand the test of time. Mo Kasti and the strategic development work completed by CTI is just that kind of work.”

Ronald J. Klimley / Tampa International Airport / Sr. Mgr., OD & Training

OUR CLIENT PARTNERS

A sampling of our clients. For a more complete list and testimonials, please visit our website.



IS YOUR STRATEGY WORKING?

A company's strategy consists of an array of competitive moves and business approaches leaders employ to produce successful business performance. Strategy, in effect, is the game plan for strengthening the company's market position, pleasing customers, and achieving performance targets. Consider the following question - **is your strategy working?** Developing a winning strategy takes foresight, discipline, and brutal honesty. But there are pitfalls – level of commitment, degree of alignment, not understanding the market conditions (the terrain), lack of execution accountability, and distractions from the urgency of day-to-day operations. There is an approach that can help minimize these pitfalls while maximizing the desired results. The approach is called the Terrain-Based Strategy Mapping System – and it works!

Leaders must treat strategy as a continuous process of translating vision and the portfolio of scenarios (Changing Terrains) into actions owned by leaders, teams and individuals in the organization.



of organizations fail to successfully execute their strategies

According to Robert S. Kaplan and David R. Norton (2001),¹ In a competitive and exponentially changing environment, strategic planning every so often is not effective.

1. The Balanced Scorecard (or balance score card) is a strategic performance measurement model which is developed by Robert Kaplan and David Norton. Its objective is to translate an organization's mission and vision into actual (operational) actions (strategic planning).



of a typical workforce does not understand its organization's strategy



of executive teams spend less than one hour per month discussing strategy

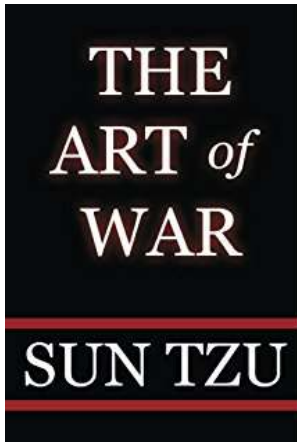


of organizations do not link management incentives to strategy



of organizations do not link strategy to budgeting

THE “ART OF WAR” AND THE CTI APPROACH™



Based on ancient wisdom and practices of the “Art of War” by Sun Tzu, the CTI Approach™ is a Terrain-Based Strategy mapping system that enables individuals, teams and organizations to explore extraordinary opportunities.

CTI recognizes the importance of agile strategy and positioning in a flexible and changing terrain. The CTI Approach™ is about creating unorthodox strategies that enable leaders to transform their business and empower

leaders and teams on the front line to assess the terrain (situation) and adjust their tactics to attain success. This unorthodox planning system helps organizations and leaders create disruptive strategies that ensure success by maintaining flexibility, aligning individuals and teams toward the organizational vision, and monitoring progress.

Succeeding in the new age requires unorthodox thinking and agile strategies. **Are you ready?**



Strategy session with the Chinese delegation.



孫子兵法

“ An effective strategist learns the Orthodox (Cheng) but wins with Unorthodox (Chi) strategies. ”

- Sun Tzu, *The Art of War*

OUR APPROACH WILL
HELP YOU ANSWER
THESE 10 QUESTIONS

01

WHY DO
WE NEED TO
CHANGE?

02

WHERE
ARE WE
NOW?

04

WHERE ARE WE
GOING?

05

HOW WILL WE
GET THERE?

03

HOW WILL WE
KNOW WE ARE
SUCCEEDING?

06

WHO DO
WE NEED TO
ENGAGE?

07

WHAT MUST
WE DO?

09

WHAT METHOD
WILL BE IN PLACE
TO ENSURE
EXECUTION?

08

HOW DO WE
BEHAVE?

10

WHAT WILL
GIVE US THE
ADVANTAGE?

THE CTI APPROACH™

A TERRAIN-BASED STRATEGY MAPPING SYSTEM

EXCLUSIVE *CTI APPROACH™* TO ACHIEVING TRANSFORMATION



HIGH PERFORMING

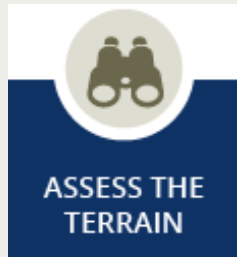
For strategic efforts, the term “terrain” refers to the market conditions. Think of it this way – different terrains lead to different conditions, different conditions bring about different concerns, different concerns translate into needing different strategies, and different strategies require different actions.

Once the terrain is understood, then the process of mapping the strategy can take place. According to Robert S. Kaplan and David P. Norton in the Harvard Business Review article entitled “Having Trouble with Your Strategy? Then Map It”, a strategy map is a visual framework of the priorities of the institution, which put into focus the often blurry line of sight between the corporate strategy and what the employees do everyday.

This is important because the authors point out that the key to executing a strategy is to ensure people in the organization understand it – in other words, people can't carry out what they don't understand.

Today in business we are seeing shifts in terrains that require shifts in leadership and strategy practices. The illustration at the top of this page outlines the five-phased approach to the Terrain-Based Strategy System. Each of the phases is outlined below and on the following pages.

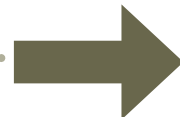
STRATEGY



We work with leadership teams to assess their internal and external terrains, identifying emerging themes, customer trends, achievements, cultural and structural challenges, and the competitive landscape that could impact the strategy. "What if" scenarios are developed, evaluated and weighted.



Working with a selected cross-functional team, we map a strategy that includes assessing the terrains and current state, including a SWOT analysis. We revisit the organization's purpose, key beliefs and guiding principles (values); and explore unorthodox, disruptive strategies for improvement.



CTI STRATEGY SIMPLIFIED ACTIONABLE MAP

MISSION
WHY WE EXIST

VISION
WHAT WE WANT TO BECOME

VALUES
WHAT WE BELIEVE IN

MARKET DIFFERENTIATORS - *WHAT GIVES US A COMPETITIVE EDGE*

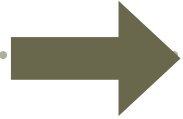
STRATEGIC OBJECTIVES - *PRIORITIES TO BUILD AND STRENGTHEN DIFFERENTIATORS (MEASURABLE)*

KEY PERFORMANCE INDICATORS - *HOW WE IDENTIFY IF WE'VE ACHIEVED OUR OBJECTIVES*



ALIGN & ENGAGE

To energize, align, and engage the entire organization, we assist in addressing the **cultural success factors** by hyper communicating the strategy and engaging all stakeholders (answering the question - what is in it for me?). Using Line of Sight tools, we assist in aligning each committee, department, team, and individual goals to the vision, strategic objectives and the measure of success.



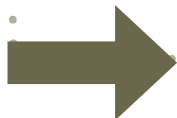
OPERATIONALIZE & EXECUTE

We link the strategy to existing operational processes and create an operating mechanism that drives effective strategy execution, maintains accountability and helps monitor progress. Champions are identified and engaged for key strategic objectives and goals.



MONITOR & SUSTAIN

To aid in execution, accountability and management of the strategy, we identify and integrate true north measures of success with clear metrics and targets. We help set up a True North operational room.



STRATEGY SESSION RESULTS

OUR RESULTS SPEAK FOR THEMSELVES.
For more case studies, please visit our website.

Board Strategic Planning Meeting Chicago
October 14-15, 2016

Care first. Community always.

THE JOURNEY OF HIGH PERFORMANCE

MISSION: To improve the health, well-being and lives of our UP communities

VISION: To be THE Model for Successful Transformation to a Dominant Regional Tertiary Health System delivering the Best Personalized, World-Class Care to our UP Communities

MEASURES OF SUCCESS

- Retention Rate
- #1 Performer LPNT/DLP/Nationally
- PSA Market Share Expectation - Regional Market Share
- HCAHPS/PEE Scores
- CoSE Scores/Employee Satisfaction
- Physician Engagement Scores
- Reduction/Elimination Contract Labor
- Community Perception Feedback
- Executing Plans to Completion and on Time and within Budget

FUTURE STATE

TOP 3 ENABLERS

- Location
- Passion & Commitment to UP
- New Hospital

TOP 3 OBSTACLES

- Recruiting Specialists/All Docs/Clinician and Retention
- Information Technology - Hurts Operations, inpatient/Outpatient
- Negative Attitude & Negative Events
- Bad Reputation, Lack of Positive Leadership, Reactive vs. Proactive

Staff Strategic Planning Meeting
November 10, 2016

Care first. Community always.

THE JOURNEY OF HIGH PERFORMANCE

HEADLINES

- Ownership of Our Past and Taking Charge of Our Future
- UPHS One of MI's Top Hospitals in Patient Care & Satisfaction
- Place to Work/Waiting List
- Community Taking Care of Community

WHAT WOULD MAKE UP HEALTH SYSTEM MARQUETTE THE BEST PLACE TO WORK?

- Meet National Pay Standards
- Zero Tolerance for Negative Staff
- Best Practices
- Consistent & Strong Leadership
- Accountability
- Quality Employee Retention
- Profit Sharing/Incentive (Reward)
- Safe Nurse to Patient Ratio
- Move FMM Upstairs
- More Paid Holidays
- Day Care Center
- Employee Recognition

LifePoint Health at UP Health System
STRATEGY MAP
 Physician session Sept 22, 2016

Care first. Community always.

THE JOURNEY OF HIGH PERFORMANCE

1 STRUGGLING 2 STABILIZING 3 ON MISSION 4 HIGH PERFORMING

PURPOSE: To improve the health, well-being and lives of our UP communities.

VISION: To be THE Model for Successful Transformation to a Dominant Regional Tertiary Health System delivering the Best Personalized, World-Class Care to our UP Communities

MEASURES OF SUCCESS

- Regional Clinical Program Development
- Market Share Growth
- World-class Quality Outcomes
- Enhance Access to Services
- Enhance Patient Perception
- Improve Employee and Physician Engagement
- Rebuild Community Perception
- Baldrige Award

FUTURE STATE

WHAT'S UNIQUE ABOUT US

- Geography
- Large/Tertiary Care Center
- Great Talent
- Sense of Commitment
- Part of a Tribe
- Part of an Island
- Care by UPers... For UPers
- We are Integrated/Part of the Community
- Comprehensive Care
- Connected to Larger System

UP Health System Marquette
100 Day Summary

Care first. Community always.

THE JOURNEY OF HIGH PERFORMANCE

1 STRUGGLING 2 STABILIZING 3 ON MISSION 4 HIGH PERFORMING

PURPOSE: To improve the health, well-being and lives of our UP communities

MEASURES OF SUCCESS

- #1 Performer in LifePoint
- Quality Scorecard
- Engagement (CoSE)
- PSA and Regional Market Share Growth
- Recognized as The Model for Transformational Change

STRATEGIC VISION: To be THE Model for Successful Transformation to a Dominant Regional Tertiary Health System delivering the Best Personalized, World-Class Care to our UP Communities

FUTURE STATE

PHYSICIANS BOARD STAFF

Partnership with Mo Kasti, CEO
CTI Leadership

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