



Business / Management Operating Systems

Peer2Peer Summit

April 30th, 2026





Our History Timeline



Therapeutic Associates by the numbers



74

Years of Service



4

States Served



80+

Unique Clinics



250+

Clinicians



900+

Employees

A culture of caring.

At Therapeutic Associates, people come first. We're committed to caring for each other and for our communities and the individuals within them. Our team of more than 900 dedicated employees provides compassionate, personalized care, delivering improved quality of life while supporting each other and our patients alike.

We invite you to explore our many roles and pursue a career in helping others.



Clinic Leadership



Clinician



Clinic Support Staff (Meds)



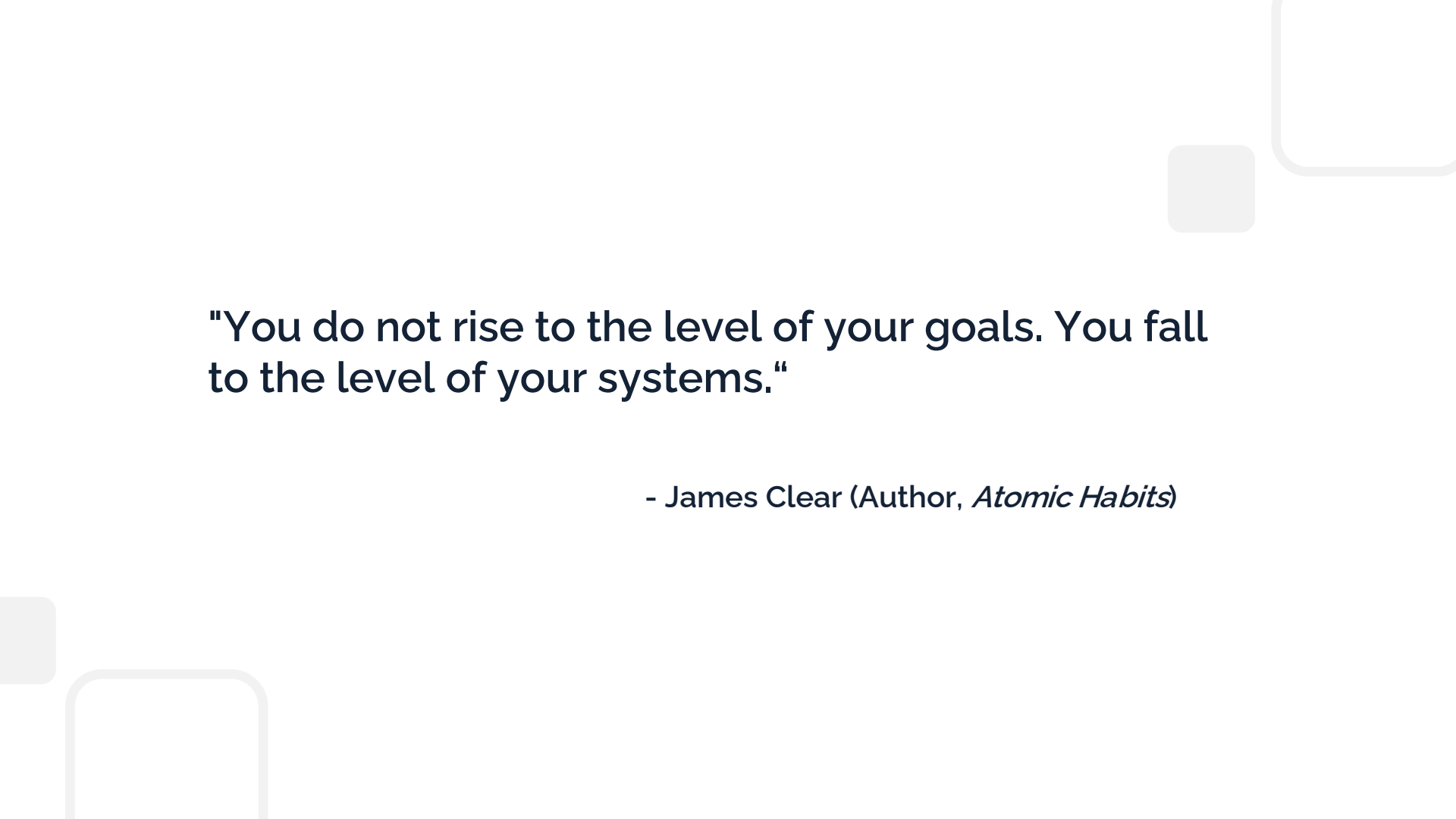
Clinic Administration



Corporate

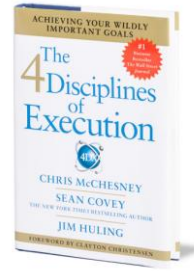
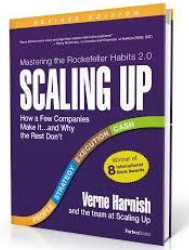


Students

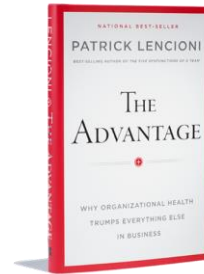
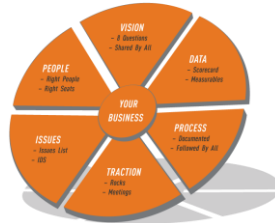
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"You do not rise to the level of your goals. You fall to the level of your systems."

- James Clear (Author, *Atomic Habits*)



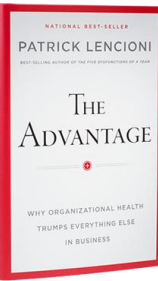
THE EOS MODEL™



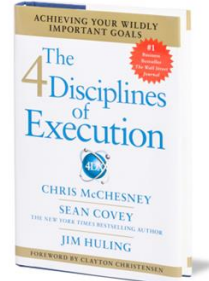
TAI's Journey



2001



2013



2018

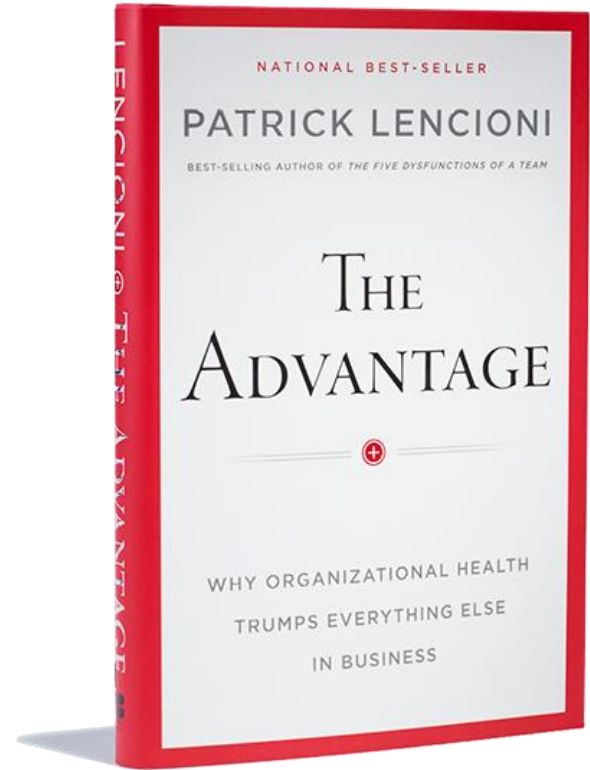


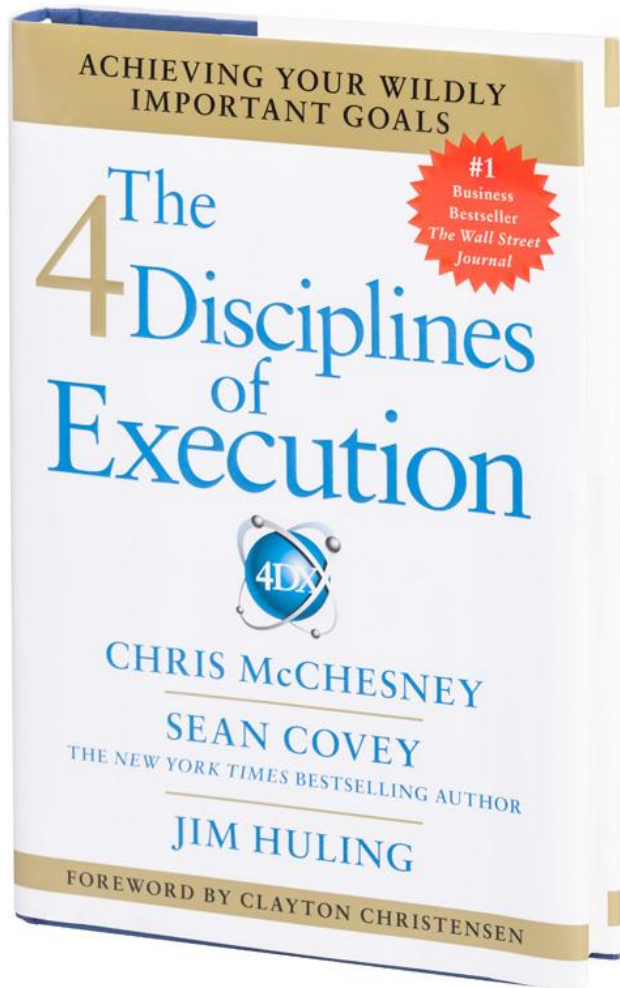
2024



Strategic Planning Model

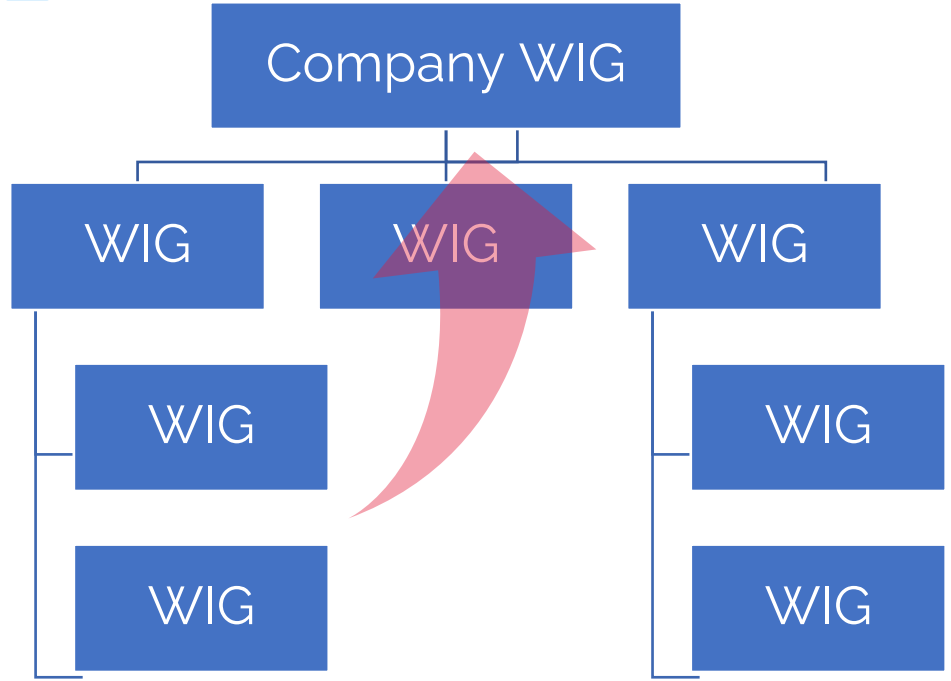
1. Why do we exist?
2. How do we behave?
3. What do we do?
4. How will we succeed?
5. What is most important right now?





4 Disciplines (4DX)

- Focus on the Wildly Important
- Act on the Lead Measures
- Keep a Compelling Scoreboard
- Create a Cadence of Accountability



Company WIG = "War"
(From X to Y by Z)

Department WIGs =
"Battles"
*(Each battle must help in
winning the war)*

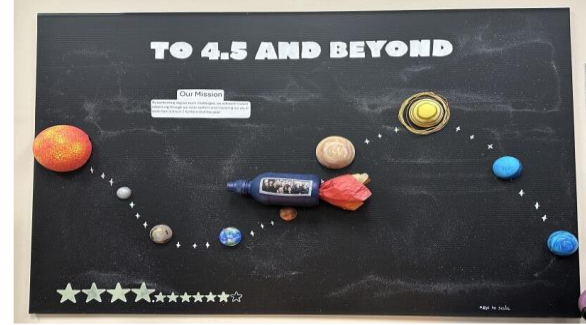


Lead vs Lag

- Lag Measures – retrospective and unchangeable
- Lead Measures – predictive and influenceable

Lead measures track activities that drive lag measures



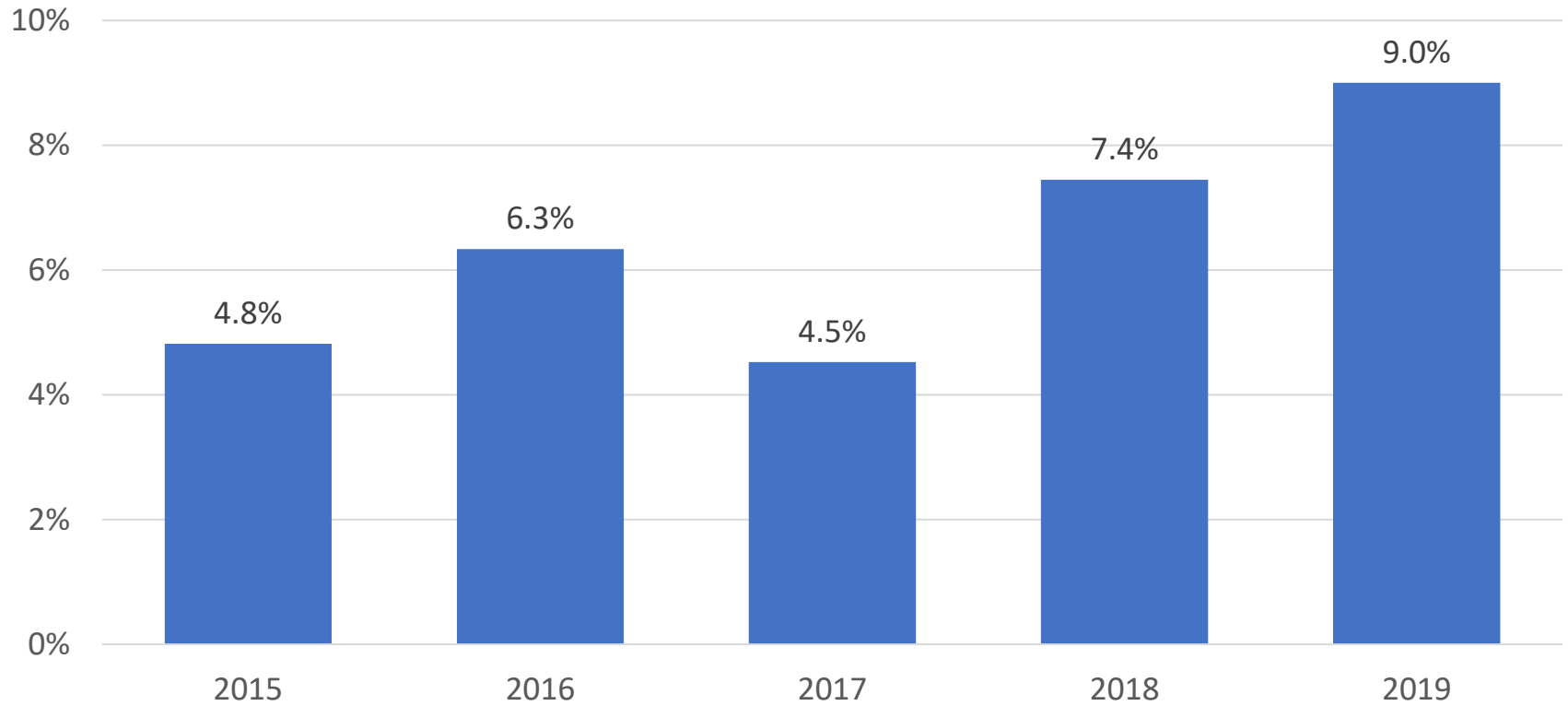


Cadence of Accountability

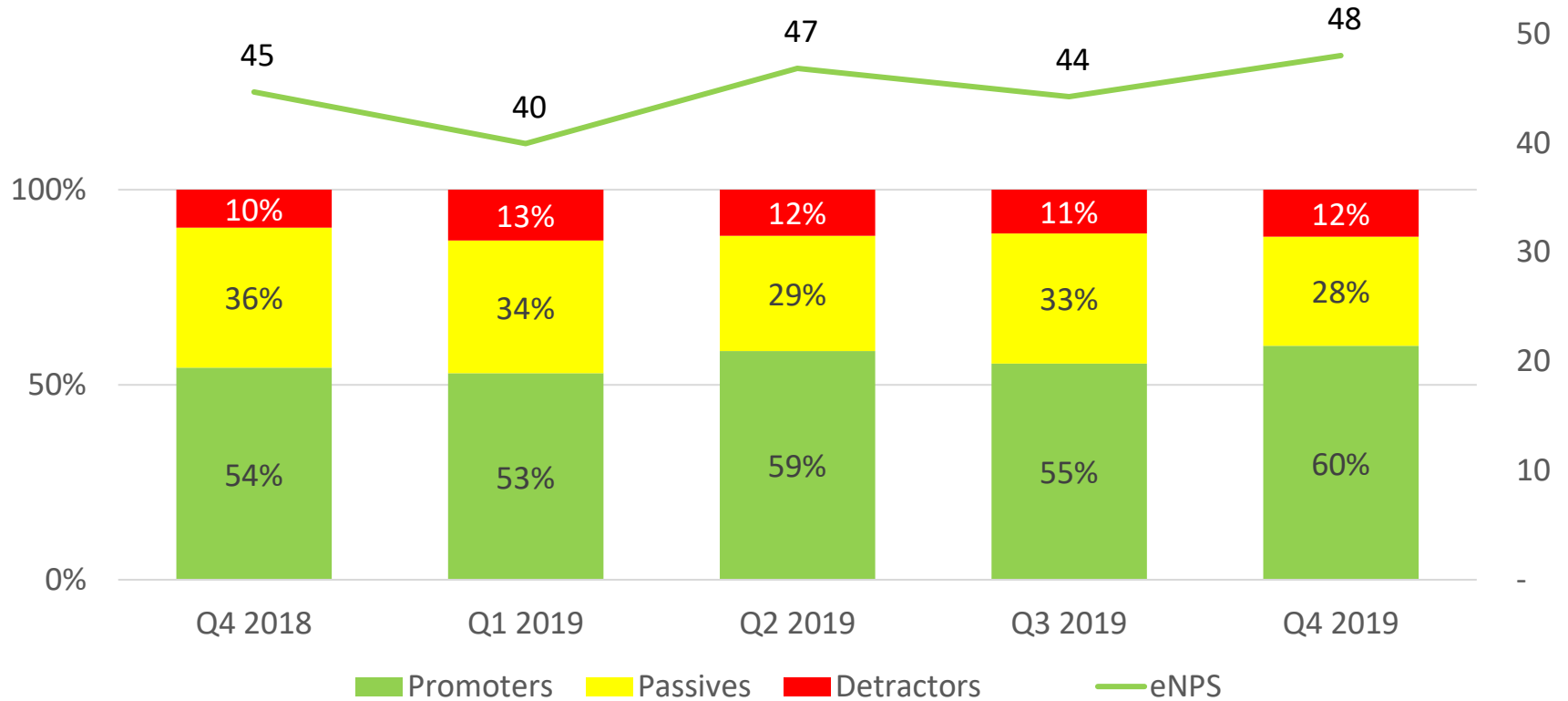
- This is where the real execution takes place
- 20-minute weekly meeting to discuss progress
- Do not discuss the whirlwind even if the building is on fire



Revenue Growth



Employee Net Promoter Score (eNPS)



“Joy in Work”

2023

Increase our joy in work average score from 4.1 to over 4.5 by December 31st, 2023.

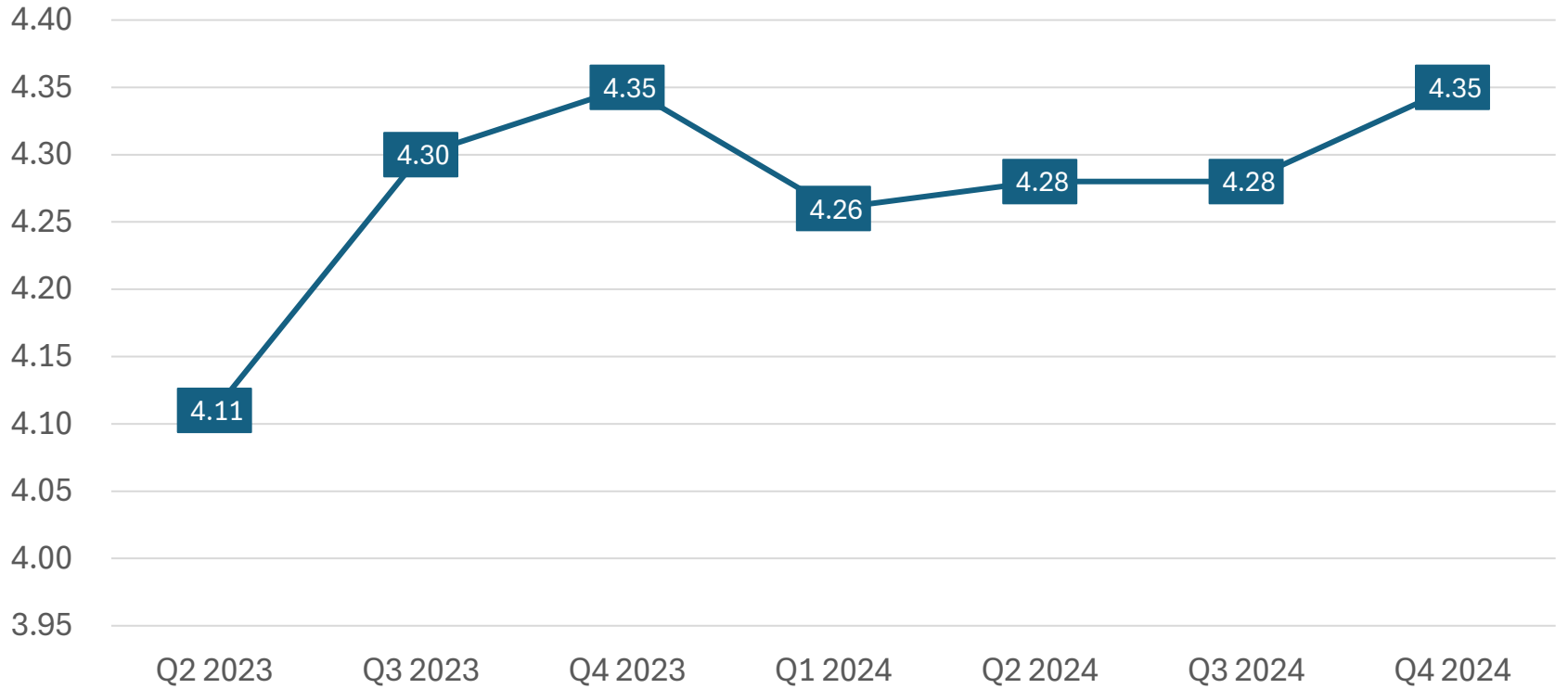
2024

Increase our joy in work average score from 4.35 to over 4.50 by December 31st, 2024.

- Meaning
- Caring
- Value / connections
- Learning
- Feedback
- **Work environment**

Constructs	Biggest Drivers	Lowest Scores
Meaning		
Caring	X	
Value / Connection	X	X
Learning		
Feedback	X	X
Work Environment		

Joy in Work



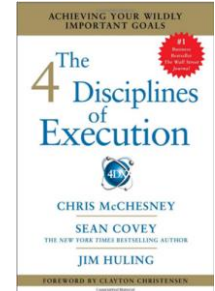
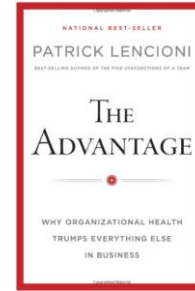
What we have learned thru 4DX

- The system drives organizational focus
- The power of saying, “No”
- The weekly cadence is critical to move the lead metrics
- We provide a list of “pre-approved” clinic battles





Company Playbook



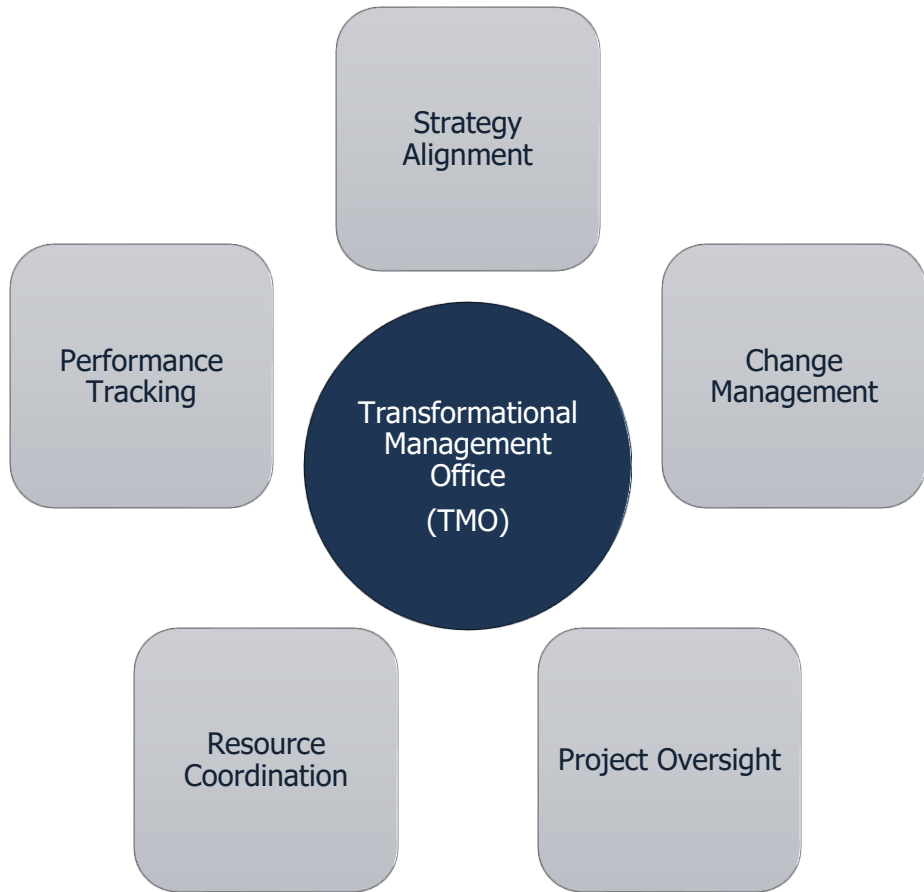
1. Why do we exist?
2. How do we behave (core values)?
3. What do we do?
4. How will we succeed (strategic anchors)?
5. What do we want to be in 2-3 years?
6. What is most important right now (WIGs)?
7. How will we measure success?





2025

- TMO
- Agile
- Initiatives
- Projects
- Sprints



TAI Playbook

Updated March 2025

Why do we exist?

To create an environment where our people thrive, and have a positive impact on the health, the health care system, and other organizations in our communities and beyond.

How do we behave (core values)?

- We have compassion for others, and it shows in what we do.
- We support a culture of learning.
- We honor our legacy by embracing ownership and individual opportunity.
- We are leaders in the markets we serve.
- We promote health and wellbeing.
- We are driven to do the right thing.

What do we do?

We provide rehabilitation and management services through free standing clinics and contracted hospital and outpatient practices. We also innovate through programs, products, services, and strategic partnering.

What company do we want to be in 1 – 3 years?

We will focus on our people. This includes recruiting and retaining top talent for all areas of our business with renewed efforts to identify and support the growth of individuals who share our core values. We will work to build a professional team that is dedicated, loyal, and flexible to meet the needs of patients and overall operations.

We will be smarter, better, and faster in everything we do. This includes:

- Making the lives of our teammates easier.
- Making the experience of our patients better.
- Providing high value solutions to our client partners in the greater health care system.

We will allocate our limited resources on specific priorities. This will require greater discipline and an improved evaluation / decision making process around company initiatives. When we commit to try something new, we will give it the necessary attention and be okay with failing fast. We will apply learning from the experience to future actions.

We will build the TAI brand through growth, investment, and business development. We will expand our clinic footprint in the markets we serve, invest in the systems (clinical, technical, and operational) that support our core services, and look for strategic opportunities to diversify and grow.

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TAI Playbook 2025

Company Wildly Important Goal (WIG)		Increase the annual new Physical Therapist hires across the company from 60 to 90 by 12/31/2025.	
Area of Focus	TAI Vision Statements / Strategic Anchors	Leadership Battles / Initiatives	Additional Projects
Patient Experience	TAI will be thought of by our patients and health care colleagues as primary care providers.		
Employee Experience	We will create an environment where all TAI teammates will be their best and be well.		
Clinical Practice	The pursuit of optimal clinical quality is actively incorporated into all business and clinical decisions.		
Business Health	We will succeed through expansion in our core business and diversification into complementary products and services.		
Shareholder Value	Shareholders receive a valuable return on their personal investment and create opportunity for others behind them.		
Long-term Goals (1-3 years)			

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What I wish I knew 18 years ago . . .

- Even big PT businesses are made up of many small businesses (clinic locations)
- Leadership in the small locations need bedrock tools and systems to help run a healthy, well aligned business
- A system like EOS is excellent in balancing strategy and execution, while also being scalable as a business grows
- Other systems can be layered on top of EOS as business needs change



