OCTOBER 17 & 24, 2026 · VIRTUAL

Together in Practice

A LEADERSHIP SUMMIT FOR THERAPISTS

Summit *Workbook*

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togetherinpractice.ca

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WELCOME

We're so glad *you're here.*

Welcome to Together in Practice. Whether you lead a team of one or twenty, you've chosen to set aside time for something that is easy to postpone: your own leadership.

Most weeks, your clients, your clinicians and your calendar come first. This summit is a chance to put yourself back on the list. To step out of the day-to-day and think about the kind of CEO you want to be, and the practice you want to build.

Each session has pre-work to get you thinking before we meet. It takes about an hour. Block it in your calendar and call it "Leadership Time." Treat it as practice for making that time a regular habit.

We ask one thing of you: come with an open mind. Be willing to learn, to be challenged, and to share what's true for you. The room is full of owners facing the same questions you are, and what you share may be exactly what someone else needed to hear.

We can't wait to be together.

Stephanie & Cecilia

Stephanie Davis & Cecilia Mannella
Co-hosts, Together in Practice

Together in Practice

A LEADERSHIP SUMMIT FOR THERAPISTS

SESSION ONE · WORKBOOK

The Identity Shift: *From Clinician to CEO*

Cecilia Mannella · Stephanie Davis

One decision you've been carrying.

What is one major business and leadership decision you've been circling? Leave it empty until then. We will come back to this at the end of the session.

THE DECISION

The decision I am making:

The date I'm making it by:

One person I'm telling:

Before we start, where *are* you?

Nothing here gets collected or shared. Answer it the way it actually is, not the way it should be.

1 One word or one sentence, each.

As a clinician, I am _____

As the owner of this business, I am _____

2 First reaction. Don't think about this one.

When I hear the word CEO used about me, the first thing I feel is:

_____

Borrow one below if it helps. Add your own.

capable *fraudulent* excited embarrassed *resistant*
relieved grandiose *impatient* exposed ambitious
tired neutral protective *ridiculous* ready

BEFORE SATURDAY · 5 MINUTES

What each chair *feels* like

In the clinician chair I feel...

In the owner chair I feel...

The thing I'm best at in the clinician chair is

What doesn't come with me into the owner chair is

DURING THE SESSION

You can tell when you've *left the seat*

TELL ONE

Deferring

The decision is waiting on someone else's comfort.

TELL TWO

Over-preparing

You're still researching a decision you made three weeks ago.

TELL THREE

Absorbing

You're paying for it personally instead of pricing it into the business.

Mine is _____

Most recently, it looked like:

FOUR QUESTIONS TO GET BACK IN THE SEAT

The *Seat Check*

You've left the seat when you're *deferring, over-preparing, or absorbing.*

01 **Whose is this?**
Is this about my client's path, or my practice's path?

02 **What am I actually deciding?**
Not the surface decision. The one underneath it.

03 **What does not deciding cost?**
Name it in dollars, in people, or in years.

04 **What does the owner of this practice three years from now need me to do?**

DURING THE SESSION

What you *said* in the room

You'll type these into the chat. Keep them here too.

ONE WORD

What one word represents your discomfort when you're in the CEO seat?

ONE SENTENCE

What permission would you need to own the word CEO?

THE SENTENCE WE ALL FINISH

I am the type of CEO who...

Your decision through *the Seat Check*

Take your decision from page one and run it through. You're not solving it here. You're finding out what it actually is.

01 Whose is this?

02 What am I actually deciding?

03 What does not deciding cost?

In dollars

In people

In years

04 What does the owner of this practice three years from now need me to do?

What came up *in the room*

A line that landed:

Whose question was actually my question?

What did I hear that I want to argue with?

One thing I'm taking that nobody said directly:

AFTER THE SESSION · 10 MINUTES

Make it a *sentence with a verb in it*

1 Rewrite the decision as an action.

Before (from page one): _____

Now: I will _____

_____

by _____

2 The one underneath.

The decision I thought I was making:

_____

The one I'm actually making:

_____

3 What it has already cost.

Not what it might cost. What it has cost me while I've been deciding?

In dollars _____

In people _____

In years _____

Staying in the *seat*

1 Carried from page 4.

My tell is that I've left the CEO seat when _____

This week it will most likely show up when:

2 When I catch myself doing it, the one thing I will do instead:

Not this: *"Be more decisive."*
This: *"Send the email before I reread it a fourth time."*

3 How do I know when I'm wearing the CEO hat?

What does it look like when I'm not?

What does that cost — me, my team, my clients?

Now go back to page one and fill in the bottom half.

AT THE CLOSE OF THE SESSION

Eight sessions. *One identity.*



01 · THE IDENTITY SHIFT

Uncomfortable doesn't mean wrong.

What did this session add to my CEO identity? ONE LINE.

What question do I need to explore further?

Together in Practice

A LEADERSHIP SUMMIT FOR THERAPISTS

SESSION TWO · WORKBOOK

Tested Values: *How to find clarity when your values collide*

Cecilia Mannella · Stephanie Davis

BEFORE THE SUMMIT · 10 MINUTES

Your values, as you would *write them today*

Most of us have been asked at some point to name our values. Before the summit, take ten minutes to do that again.

Write down the five values you would want people to see in you and in your practice. These might be values you would put on your website, share with your team or hang on the wall of your office.

There are no right or wrong answers. Write the values that feel true to you today, and bring this page with you to Session 2.

MY VALUES

1 _____

2 _____

3 _____

4 _____

5 _____

Which of your values has been *tested?*

Copy the five values from your pre-work into the left column. Next to each value, write one decision where acting on that value cost you money, a relationship or your peace. A few words is enough to remind you of it.

If you can name a decision like that, circle the value, because it has been tested. If you cannot think of one, leave the line blank and move on.

A blank line is not a failure. It is useful information. It tells you that this value is aspirational for now: something you care about, but have not yet had to pay a price for.

A sustainable practice STEPHANIE EXAMPLE	We did not raise our fellows' stipend when we raised our session rate. Raising it, as we always had, was the easier choice. It cost us a fellow's disappointment, and our own peace.
Honesty CECILIA EXAMPLE	I let go of a clinician I had hired when I found she had been taking supplies from the office. Letting it slide would have felt kinder. It cost me a painful ending and weeks of guilt.

VALUE	WHEN IT COST ME
1	
2	
3	
4	
5	

DURING THE SESSION

Three hard calls. *Pick one.*

Choose the scenario that feels closest to your own practice. You will use the same scenario twice during this session.

SCENARIO A

A client who can't afford to stay

A client you have seen for two years has lost her job, and with it her extended health benefits. She asks if she can keep coming at a reduced rate. You already see three clients at a reduced rate, and your own income dropped 8% last year.

SCENARIO B

A clinician who has pulled away

Your highest-billing therapist has been with you four years. She is good with clients, and she has not come to a team meeting since March. Two other clinicians have now mentioned it to you separately.

SCENARIO C

A chance to expand

A second location comes up at a rate you won't see again. It is a five-year lease. You would need to hire four clinicians in eight months and be back full-time in the business for at least a year.

What would you *actually do?*

Write down what you would really do if this situation landed on your desk today. Try not to overthink it. We want your honest first response.

Scenario I chose: _____

My first answer:

KEEP THIS CARD

The *Clarity Check*

BEFORE YOU START

React · 30 seconds

How am I feeling about this decision? How real is the problem? Which part of it is actually mine? Notice your feelings, then move on.

01

Audit: What has this already cost me?

Count what staying stuck is costing you now: time, energy, money, relationships, team culture and your own peace. Not deciding is a decision, and it has a cost too.

02

Collision: Which two values are pulling against each other?

Say it as one plain sentence: “My ___ is pulling against my ___.” Then decide which value wins in this decision. It is not a permanent ranking; next time the other value might win.

03

Cost: What will each choice cost me?

Take each option in turn and name what it would cost you in money, people or time. A cost you name in advance is a choice. A cost you did not name feels like a failure later.

04

Precedent: Am I willing to make this the rule?

Whatever you decide becomes the rule in your practice, whether you mean it to or not. Ask what the owner of your practice, three years from now, would need you to decide today.

Now run your scenario through *the Clarity Check*

Go back to the scenario you chose. Imagine it is happening in your own practice. You will bring your own values to it, so two people with the same scenario may find different collisions. Keep your Check your list page beside you.

REACT · 30 SECONDS

How am I feeling? How real is it? Which part of it is mine?

1 **Audit.** What has this decision already cost me?

_____

_____

2 **Collision.** Which two values are pulling against each other for me?

My _____ is pulling against my _____

Is either one a value I circled on my list? Yes / No

For this decision, the value that wins is: _____

3 **Cost.** What will each choice cost me?

If I choose A, it will cost me _____

If I choose B, it will cost me _____

4 **Precedent.** Am I willing to make this the rule?

_____

My decision:

_____

_____

AT THE CLOSE OF THE SESSION

One value that has *cost you something*

Write one line: a value you circled on your list, and the decision that tested it.

Value _____

Tested by _____

Why this one:

_____

_____

_____

_____

_____

_____

One decision *I am carrying*

Think of a decision in your own practice that you have been putting off. Name it here in one or two sentences.

Then choose a date, within the next two weeks, when you will sit down and run it through the Clarity Check.

The decision I am carrying:

I will run the Clarity Check on it by: _____

Who I will tell, so someone knows I have committed to this:

_____

One value *to test*

Look back at your Check your list page. Choose one value you left blank. This is a value you care about but have not yet had to pay a price for.

Over the next month, watch for a decision where acting on this value would cost you something. When it comes, notice what you choose.

The value I want to test: _____

Where I think it might show up in my practice:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

AFTER A REAL DECISION

Looking back *on a decision*

Use this page a few weeks after you have made a decision using the Clarity Check.

1 What was the decision, and which value won?

2 What did we miss?

3 What could we not see at the time?

4 What part of the outcome is ours to own?

5 Did the cost turn out to be what I expected? If not, what surprised me?

6 Would I make the same decision again?

AT THE CLOSE OF THE SESSION

Eight sessions. *One identity.*



02 · TESTED VALUES

A value is tested when it costs you something.

What did this session add to my CEO identity?

ONE LINE.

What question do I need to explore further?

AT THE CLOSE OF THE SESSION

Eight sessions. *One identity.*



03 · FINANCIAL LEADERSHIP

You can delegate tasks, not financial leadership.

What did this session add to my CEO identity? ONE LINE.

What question do I need to explore further?

AT THE CLOSE OF THE SESSION

Eight sessions. *One identity.*



04 · RETENTION AS LEADERSHIP

Track. Target. Train. Tweak.

What did this session add to my CEO identity? ONE LINE.

What question do I need to explore further?