Organizational Risk Management, CEO and Engineering Team Departure, Knowledge, and Intellectual Property at Risk

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ABSTRACT: This case study examines the organizational, technological, and competitive risks faced by Touchstone Innovations (THI) following the abrupt departure of its visionary CEO and the core AI engineering team to join a direct competitor, HealthTech Solutions. The exodus triggered critical losses in tacit knowledge, workforce morale, and operational continuity, exposing vulnerabilities in THI's talent-retention strategies and Enterprise Risk Management (ERM) practices. Using the Resource-Based View (RBV) theory, the study demonstrates how the loss of unique talent undermines innovation capacity, operational continuity, and market positioning. The paper further examines the impacts on employee morale, stakeholder confidence, and organizational culture. It further evaluates employee impacts, stakeholder repercussions, and cultural misalignment. To address these challenges, the study applies the Kepner-Tregoe (KT) method, the Eight Disciplines (8D) model, the ADKAR and Lewin change frameworks, and the COSO ERM model to propose legal, operational, and cultural recovery strategies. Findings emphasize the necessity of proactive risk management, knowledge institutionalization, robust intellectual property (IP) protection, and cultural alignment to restore resilience and ensure sustainable organizational performance. In doing so, the paper values the need for structured knowledge management, stronger IP protection, cultural redesign, and long-term strategic planning to regain stability and sustain innovation.

KEYWORDS: intellectual property protection, knowledge management, talent retention, enterprise risk management, organizational culture, leadership succession, competitive advantage

JEL Codes: O34; M14, M12, L86, M21

Introduction

Telehealth has experienced significant growth during and after the COVID-19 pandemic and has been recognized as a transformative force in the healthcare industry, aiming to deliver effective, accessible care nationwide. Given the opportunity presented by the telehealth revolution during and after COVID-19,

Touchstone Innovations (THI) seized a position in this newly created market and became a key provider in telehealth. THI positioned itself as a leader in telehealth solutions, offering quality care services ranging from remote patient monitoring to virtual consultations. Touchstone Innovation heavily emphasized agile environments for creating and delivering business value, which is crucial to maintaining competitiveness and staying ahead in the telehealth industry (Salamzadeh et al., 2023). THI has been a leader in telehealth delivery, leveraging technological advancements, cloud-based solutions, and mobile apps to increase patient engagement while providing consistent care to the elderly and children, including those in remote areas. However, technological advancements and effective leadership are closely intertwined, as exemplified by THI, which maintains market presence by focusing on enhanced access and efficiency for both medical providers and patients (Salamzadeh et al., 2023). The visionary CEO and talent team's departure created a crisis that affected THI by increasing organizational risk, knowledge loss, and intensifying market competition. Following the CEO's sudden departure, THI encountered hurdles that necessitate a comprehensive exploration of the situation through advanced concepts in organizational management and enterprise risk management (ERM) because THI faces a multifaceted crisis. The first crisis is the departure of the CEO, a critical member of the AI engineering team, who has joined competitor HealthTech Solutions, posing risks to organizational continuity, knowledge retention, competitive strategy, and morale. The second crisis involves the competitor HealthTech Solutions, which may have gained technological knowledge through access to THI's intellectual property, which potentially violates legal non-compete clauses or the sharing of trade secrets and data sources.

The departure of a visionary CEO from THI was instrumental in the development of AI telehealth tools, raising concerns regarding Intellectual Property (IP) in organizational strategy and competitiveness because the transfer of key personnel to the competitor of HealthTech Solutions posed a risk in human capital loss and potential infringement of intellectual property legal rights. Intellectual Property is a critical asset for technology-driven companies advancing telehealth. However, the exodus of engineering teams harms intellectual property, technological knowledge, information, and innovation in the telehealth market. Adequate legal protection of intellectual property rights (IPRs) is crucial for preventing unauthorized use, protecting the creator's innovation, and enabling financial benefits (Budiman & Hammar, 2024). Leveraging information and having an intellectual property framework significantly influences a company's market position and serves as a basis for competitive differentiation through innovation-driven tactics compared to other industries (Su et al., 2013). In the health sector, digital tools are essential because when team members transition to HealthTech Solutions, they can transfer knowledge through informal networks, which leads to unauthorized use of patented technologies (Adams, 2023).

Problem Statement

The Touchstone CEO has abruptly resigned, and the AI engineering team has departed to join the HealthTech Solution competitor. This coordinated departure of key personnel has created leadership, human capital, and critical institutional knowledge gaps, which undermine company practices and management decision-making processes (Yu et al., 2014). THI faces severe damage to its explicit and tacit knowledge due to the mass exodus, which is essential to ongoing AI project development. Knowledge loss poses challenges for the company's management team, and research by Deloitte and Touche (2005) has found that 69% of the 1396 human resources practitioners surveyed said that attracting new talent poses the greatest threat to competitiveness, while 34% of incoming workers can possess inadequate skills, which affects the company's competitiveness of developed programs (Jennex, 2009; Yu et al., 2014). Competitive disadvantage created by competitor HealthTech Solutions has enabled it to gain immediate insider knowledge of THI technology and potentially trade secrets, eroding Touchstone's market innovation, thus creating an intellectual property vulnerability. A US Department of Commerce report found that Intellectual Property (IP) losses cost US companies "$200-250bn annually" (Warren, 2015; Power & Burgess, 2011). The Intellectual Property Act of 2011 states that copyright piracy of business software costs the U.S. economy $58 billion in total output, $16.3 billion in earnings, and $2.6 billion in tax revenue (Senate Report 112-39, 2011). According to Visual Capitalist, "Intangible Asset" accounts for 90% of total assets, indicating that a company's business value lies in its intellectual property rather than its physical assets (Ali, 2020; Oberbrunner, 2023). Therefore, the transfer of the talent team has increased the risk of intellectual property misappropriation and led to costly legal battles over non-compete clauses and trade secrets. Schuster & Day (2021) have stated that the average price to defend patent litigation, let alone win an infringement lawsuit, exceeds $3 million.

Intellectual property theft and infringement remain significant challenges for companies seeking to maintain a competitive advantage. Digital piracy cost the global software industry over $41 billion in 2023, and international courts handled more than 23,500 IP-related disputes, and intellectual property cases reached 7,200 in FY 23 (Market Growth Report, 2025). The general problem is that intellectual property losses and knowledge gaps have caused operational disruption and a decline in morale, hindering ongoing operations and product development, and damaging employee morale and workforce stability.

Significance of the Study

This case study examines the real-world challenges organizations face when executives and engineering teams depart for other companies, highlighting the loss

of knowledge due to intense competition and the theft of their most valuable intangible asset: intellectual property. Touchstone Innovations' failure to protect intellectual property effectively has created a dire loss of revenue and innovative ability to respond to its competitor, HealthTech Solutions. This has clear, far-reaching consequences that damage competitiveness, innovation, and market share (Warren, 2015). Power and Burgess (2011) emphasize that protecting intellectual property is vital to advancing science and industry. Intellectual property theft cost was $300 billion in 1997, and its cost remains $200- $250 billion in recent years (Barr et al., 2003; Warren, 2015; Power & Burgess, 2011). Barr et al. (2003) emphasized that Fortune 100 companies have lost more than $45 billion due to trade secret theft.

Intellectual property contamination is a serious legal issue when a competitor hires employees who have access to a rival's confidential information for their own benefit. Intellectual property creates value, especially for technology companies, by enabling higher market valuation, stronger brand recognition, and competitiveness (Andersen et al., 2012). Previous research has primarily focused on large corporations, overlooking the impact of talent poaching and intellectual property as competitive strategies on technological companies during COVID-19, thereby revealing unfair competition (Aina-Pelemo, 2021).

The Resource-Based View (RBV) theory is a critical framework in strategic management and enterprise risk management (ERM), emphasizing a company's talent resources as a source of competitive advantage and as a driver of sustainable competitiveness (Madhani, 2010). Adopting the RBV framework requires companies to formulate strategies to nurture unique resources and protect sustainable competitive advantage (Barney et al., 2021). The RBV theory enables managers to exploit resource and product-market imperfections to enhance company performance (Lockett et al., 2009).

The findings can help industry professionals, practitioners, scholars, healthcare providers, policymakers, and business leaders better understand the challenges in retaining talent acquisition teams and preventing trade secret theft. The departure of the THI CEO and its talent team highlighted a failure in THI's ERM strategy and its risk indicators, such as employee dissatisfaction, lack of internal growth, or uncompetitive compensation, which went unnoticed (Scarlat et al., 2012).

Theoretical and Conceptual Framework: Resource-Based View (RBV)

Resource-Based View (RBV) theory focuses on leveraging existing resources to achieve and sustain competitive advantage, serving as a theoretical framework for how companies can do so through unique resources (Madhani, 2010). The RBV theory plays a strategic management role in THI by examining how the loss of intangible resources, particularly key talent, affects competitive advantage. Talent

resources are a company's most valuable asset, enabling the implementation of strategies to improve efficiency, capitalize on opportunities, and detect threats (Wernerfelt, 1989). Furthermore, for the RBV to function, it must hold distinct resources, including both tangible and intangible assets, which contribute to the company's strategic objectives. The engineering team is a key, tangible intellectual asset, with specialized skills crucial to developing telehealth AI tools. As noted by Frank et al. (2011), team specialty is crucial capital for fostering and sustaining market advantages, and sudden departures of this capital jeopardize a company's innovative capabilities. The second linked resource is intangible assets, which represent the brand equity of the technological parts without the key personnel. The loss of the engineering team lead creates vulnerabilities in maintaining product quality and driving service innovation, which represents a resource drain on achieving organizational outcomes (Xie et al., 2013). Knowledge-based environments like telehealth are built on structured approaches designed to achieve success, focusing on knowledge management to mitigate potential losses from the situation at THI (Latif et al., 2020). Furthermore, engaging in training and cross-training could enhance Touchstone Innovations' current workforce capabilities. This strategic development aligns with the RBV theory because it nurtures current resource competencies that reinforce competitive advantages even after the disruptions (Xie et al., 2013). Accordingly, the RBV emphasizes prioritizing rebuilding human capital and recruiting highly skilled personnel to fill gaps left by the departure of the engineering team and to improve overall capabilities to restore the innovative potential (Franck et al., 2011). At the same time, fostering a supportive culture that cultivates knowledge sharing and collaborative expertise enhances employee morale and performance (Xie et al., 2013). A key component of the RBV is to strengthen the innovation process, ensuring teams are resilient and adaptable to changes in team composition, enabling the integration of new team members into projects, and leveraging diverse perspectives (Vestal & Mesmer-Magnus, 2020).

The role of knowledge management is akin to that of intellectual property (IP), aligning with the RBV through effective knowledge retention and transfer within an organization, thereby helping maintain and enhance intellectual property rules and regulations. The Resource-Based View theory identifies knowledge as a significant resource that should be nurtured and collected to build an intellectual property strategy, as this would foster the creation of databases and systems to allow information access (Reed et al., 2006). The RBV emphasizes the use of intellectual property to align with business strategies, maximizing firm value, and capitalizing on unique resources through strategic planning. Therefore, to maintain a competitive advantage, companies should protect their current intellectual property and invest in innovation to develop new intellectual property assets, as this enables them to adapt and navigate changing external environments (Sher & Lee, 2004; Reed et al., 2006). The RBV theory focuses on leveraging

internal resources—such as unique specialization, technology, and innovation—to build a competitive advantage, to safeguard knowledge and intellectual property, and promote organizational stability (Hart, 2025). In contrast, the dynamic capabilities approach emphasizes an organization's ability to rapidly sense opportunities or detect threats, seize them effectively, and "reconfigure resources in response to fast-paced technological or market changes" (Hart, 2025).

This literature review focuses on knowledge management and intellectual property through the RBV, which affects company dynamics, technological advancement, and intellectual property safeguard. The current research examines THI 's internal resources as a source of competitive advantage through resilience and market adaptability. This examination provides a strategic foundation for telehealth companies and businesses to align their organizational technological capacities, talent retention, innovation, and protective intellectual property to achieve a competitive advantage. Most of the research reviewed is grounded in the RBV theory, while explorations of knowledge management, risk management strategies, and intellectual property safeguarding aim to secure long-term market viability.

Impact on Employees

The departure of the THI CEO and the engineering team affects the remaining employees' job performance and long-term commitment. Moreover, the departure harms the employee's emotional and psychological well-being, which leads to employee withdrawal and negative workplace politics (Ferdowsian, 2002). Sudden CEO and employee departures lead to a loss of trust and employee uncertainty within the organization. In organizations where leaders are trusted, employees perform better (Mayer, 2007). Moreover, employees tend to have a "psychological contract" with their employer, which erodes in return for employee loyalty, security, development, and growth (Cullinane, 2006; Hart & Thompson, 2007; Aggarwal & Bhargava, 2009; Somoro et al., 2024). Therefore, the departure of the THI CEO and the poaching of key team members have breached the "psychological contract," leaving the remaining employees undervalued and fostering disengagement. Employee disengagement is maximized under poor leadership and low trust of management, which creates significant employee discrepancies (Pech & Slade, 2006; Allam, 2017). Allam (2017) states that disengaged workforces are less committed and less involved in their work, and 'they may leave the organization too' because they experience increased fear and anxiety about job security. Furthermore, Kahn (1990) stated that employee disengagement is the 'withdrawal' to protect oneself emotionally and cognitively, meaning that employees are emotionally detached from work, and tasks become effortless. Disengagement increases turnover intentions because employees who feel unvalued and less engaged are more likely to leave an organization (Christian

& Ellis, 2014; Davis, 2015). In an organization, employees who perceive knowledge hiding by the departed employees may experience job dissatisfaction and negate the relationship between knowledge and turnover intentions (Bianco, 2023). The loss of institutional knowledge, resulting from the departure of collective expertise, creates a knowledge vacuum that hinders projects and innovation, ultimately affecting the organization's ability to maintain an advantageous market position. Organizations should maintain a transparent work environment and foster knowledge building and sharing, as this helps mitigate organizational challenges, decrease employee turnover, increase organizational stability, and encourage employee collaboration. The technological field is characterized by higher employee disengagement and turnover due to employee burnout and exhaustion (Bianco, 2023; Ford et al., 2013; Ford & Burley, 2012). Lastly, when employees feel disengaged and "dissatisfied with their work, organizations become weaker" (Wen et al., 2022).

Impact on Organizations

The Touchstone Innovations (THI) crisis extends beyond employee morale and productivity, affecting the entire organization's financial, technological, and innovative capabilities in the telehealth market. The mass employee departure has resulted in a significant loss of institutional knowledge, crucial for Touchstone Innovations' telehealth tools. Operational disruptions lead to costly errors and give rival companies a competitive advantage. Moreover, the employee exodus has created a gap in the ability to innovate and deliver products and services, with a direct impact on employee retention, workloads, and employee exhaustion, leading to increased errors and a competitive disadvantage in the market. Such a situation leads to low employee morale and reduced productivity, increasing turnover and decreasing organizational performance. Low employee morale leads to inadequate recognition and has direct psychological effects, making employees feel "not acknowledged and dissatisfied," which, in turn, correlates with low productivity (Magubane & Ngwenya, 2024). Low employee morale directly affects performance goals and increases turnover, as employees seek a more fulfilling work environment (Arunchand & Ramanathan, 2013; Magubane & Ngwenya, 2024). This has a direct impact on the erosion of competitive advantage, as the rare team resource at THI has been transferred to its rival, HealthTech Solutions. Consequently, this creates an opportunity for its rival to capitalize on capital gains and inflict damage to its market brand perception. Low morale and low productivity present significant challenges. It is crucial to recognize how to improve work culture and job satisfaction, as addressing these issues will foster a more productive workforce.

Impact on Stakeholders

The THI crisis has had a vast effect on its stakeholders, customers, and partners. The THI exodus has raised uncertainty following the visionary leader CEO's departure, signaling a management crisis and jeopardizing the company's future. Visionary leaders foster agile cultures that encourage adaptability and innovation, and when gone, this would cause a sudden morale decline and a lack of organizational responsiveness to market competitiveness, which" creates significant organizational shifts" (Stoten, 2021). The loss of a visionary leader compromises the organization's ability to respond to crises, leaving it vulnerable and with inadequate contingency plans for risk assessments (Dahmen, 2023; Mizrak, 2024; Chandler, 2022). Furthermore, this raises concerns over service continuity, product quality, and product innovation due to the loss of of key talent. Loss of" trust in brand reputation" causes clients to lose confidence in the brand, and this leads to talent loss and lured and hired by the rival competitor (Kotler et al., 2021; Freundt & Foschiera, 2024). Given THI's situation, this raises overall organizational instability, as suppliers may not want to enter into long-term agreements. However, competitors seize opportunities to offer more stability and confidence in their products. The departure of a visionary leader creates significant opportunities for competitors, allowing them to seize and capitalize on the opportunity for competitive advantage (Everlyne et al., 2024). The CEO's departure and the exodus of the talent team put HealthTech Solutions in a strategically advantageous position. Talent poaching causes enhanced reputation and talent attraction for HealthTech Solutions, but at the same time, this creates "legal and ethical risks due to employee contractual agreements" (Bloomfield et al., 2025; Nandini, 2020). However, companies may face lawsuits from competitors if employee poaching is deemed unethical, as it occurs in organizations that prioritize highly skilled talent and receive direct offers from competitors (Nandini, 2020). Employee poaching is more common in the IT sector, where jobs are in high demand, and talent acquisition is a priority (Nandini, 2020).

Problem–Solving Model: The Kepner-Tregoe (KT) & Eight Discipline (8D)

The Kepner-Tregoe (KT) method and the Eight Disciplines (8D) problem-solving processes are the two chosen methods to be applied to the THI crisis. While both are powerful problem-solving models, they differ: the Kepner-Tregoe method is a high-level, rational decision-making model, while 8D focuses on a structured, team-based approach to addressing quality-related issues. The KT method is based on rational thought and evidence-based in identifying a problem, making a decision, and managing risk (Markopoulos et al., 2021; Dennis, 2021). The KT method relies on a structured approach to be effective, facilitating a clear understanding based on importance, a systematic evaluation of alternatives, and decision-making based on criteria. The KT first step involves root cause analysis

and situational appraisal (Steakley & Steakley, 2020). The first step helps to identify the talent loss resulting from the visionary CEO's departure from the AI engineering team and its causes to the organization, such as knowledge gap loss, low morale, damaged reputation, operational disruption, and intellectual property risks, including the potential use of confidential information transferred to a competitor and potential loss of trade secrets. However, this stage is crucial for identifying the root cause of the issue by using the "5 Whys" to explore underlying causes (Steakley & Steakley, 2019). The next step of decision-making incorporates "the evaluation of alternatives" and choosing the best course of action, with the primary focus on how to reestablish market competitiveness after the CEO exodus (Gultom & Siallagan, 2025). Lastly, potential problem analysis can help teams partner and look for possible solutions to "reduce risk and enhance possible opportunities" (Markopoulos et al., 2021).

Moreover, the KT method employs a structured approach to streamline processes through effective team collaboration and effective communication. Team collaboration and effective communication are crucial in healthcare, as a lack of either can lead to errors (O'Daniel & Rosenstein, 2008). Team collaboration in a group "helps the group to perform beyond the sum of individual talent" (Bolstad & Endsley, 2003). Additionally, the KT method has been employed previously in the healthcare industry for its structural approach to optimize "quality scorecards to systematically prioritize quality metrics to improve patient care and operational efficiency" (Guth et al., 2016). The (KT) method is an efficient organizational decision-making approach that utilizes structured thinking and collaborative teamwork to solve problems, ultimately improving overall organizational performance and providing a competitive advantage. The KT method can develop a plan to build new teams, identify why new hires have left THI, determine whether a competitor used stolen intellectual property, and identify whether projects have failed due to a lack of employee expertise. Toxic work environments could lead to an exodus of employees from THI. There is a direct relationship between work environments and employee engagement, which indicates how employees can work and spread negative feelings among other employees (Rasool et al., 2021). Moreover, employee negative feelings come with a "toxic environment, such as harassment, bullying, or ostracism," which is "detrimental to employees and leads to unnecessary stress, depression, and anxiety" (Rasool et al., 2021). Lastly, employee well-being affects employee behavior, which in turn directly influences employee engagement in the organization. The KT method enables the implementation of preventive actions through mentorship programs and a robust culture orientation for new hires. It is essential to foster mentorship programs that maintain mutual learning and support, which can be hard to attain in physically dispersed workplaces (Wikstrom et al., 2023; Finkelstein & Poteet, 2007).

KT offers to develop a preparedness plan outlining the legal team's approach to responding to a competitor's product built with stolen intellectual property. The visionary CEO of THI failed to protect intellectual property because, as a company's executive, there should be a charge to confront this shape-shifting improper measure (Power & Bourgess, 2011). Furthermore, personnel will need to understand the methods used to commit intellectual property theft and the economic costs of the resulting damage (Power & Bourgess, 2011). However, it is essential to provide training and awareness that alerts employees to recognize crime and to prevent it in the organization (Power & Bourgess, 2011). It is necessary to document the characteristics of the methods that will deliver awareness (Power & Bourgess, 2011).

The Eight Disciplines (8D) is a structured, team-oriented approach to identifying, correcting, and eliminating quality-control problems (Zarghami & Benbow, 2017). The model critically examines quality-related services, focusing on structural changes to prevent product failures, which could help THI to address the CEO's departure and the loss of key engineering talent, while improving overall processes. The 8D problem-solving process consists of several steps aimed at building team focus and exploring problems to develop practical solutions. Furthermore, the 8D goal is to "define the problem, implement solutions, eliminate concerns, improve quality, and report the findings" (Barsalou et al., 2023). The 1rst Discipline aims to identify the interim CEO for THI and to form cross-functional teams to identify the problem. For example, this step recommends "assigning a team leader for the project and a subject matter expert" (Barsalou et al., 2023). The 2nd Discipline focuses on the problem description and quantifiable impact, ensuring the team has a good understanding of the problem and its effect on the company. The 3rd Discipline of the interim containment action seeks to isolate the issue, review it, and modify it before delivery to the customer (Barsalou et al., 2023). This step aims to emphasize the importance of efficient communication and to review any legal compliance or confidentiality agreements that may need review or reinforcement. The 4th Discipline enables in-depth root cause analysis, where teams collaborate with subject-matter experts to identify the underlying causes, such as the sudden departure of the CEO and the talent team, ensuring they do not recur, and addressing the lack of cross-functional collaboration. (Barsalou et al., 2023). The 5th Discipline seeks to implement corrective and actionable measures by rebuilding teams and establishing knowledge management systems that facilitate the sharing of critical technical knowledge, thereby enhancing effectiveness (Barsalou et al., 2023). The 6th Discipline ensures the corrections are valid, allows room for changes through expert voices, and incorporates these changes into the product (Barsalou et al., 2023). This stage enables risk enterprise management controls through team surveys or by identifying project milestones. The 7th Discipline stage aims to modify processes and to conduct regular personnel check-ins to ensure employee

satisfaction and prevent future issues and sudden departures. The improved processes should be operational, and their performance metrics should not negatively impact production (Barsalou et al., 2023). Lastly, the 8th Discipline aims to build morale, reinforce accountability, and "congratulate the team for achievements" (Barsalou et al., 2023). Employing the 8 Discipline model allows for faster problem solution and cohesive team collaboration. However, this creates a balanced approach to problem-solving that combines structured methods with innovative thinking for complex issues. The core of the 8D emphasizes a structured, collaborative approach that aims to improve services through product quality and customer satisfaction, thereby maintaining the brand's competitive advantage in the market.

Organizational Culture Models: Schein's Model and Competing Values Framework (CVF)

Schein's model is a valuable and applicable model for organizational assessments and interventions because it aims to evaluate and improve organizational culture through effective operational strategies (Mardiana et al., 2018). Schein's model categorizes organizational culture into three parts — artifacts, espoused beliefs, and basic assumptions — because analyzing these aspects enables leadership to align outcomes with desired performance. The artifacts are the basic observable elements of a culture that point to what cannot be fully represented by an organization's deeper values (Westover, 2024). The THI meeting — including whether meetings have been held biweekly or monthly and how the CEO has communicated across teams — is crucial because it directly influenced the abrupt departure of the visionary CEO and the subsequent team exodus. Furthermore, the espoused values reflect norms that guide employee behavior, highlighting potential gaps in the organizational cultural alignment (Lawal et al., 2024). Espoused organizational values are norms and values that can be reflected in a company's mission statement. How its members think or act, and any gap in these values, can create brand mistrust and market disadvantage. The visionary CEO espoused values based on innovation and customer service, leveraging its talent team to develop AI telehealth tools. However, the exodus exposed organizational values that may not align with the current situation, as the former CEO and AI talent team may have prioritized personal interests over the company's future (Asare et al., 2025). Lastly, it is essential to examine the basic underlying assumption that behaviors can be embedded in the organization, which shapes its culture. These behaviors can be unspoken, and understanding them is crucial because they can influence group members' feelings and thinking, which, in turn, affects cultural change and how employees perceive their roles in the organization (Mazur, 2015). A crisis management team at THI will investigate the resignation artifacts, examine the failure of talent retention, and assess the fundamental

assumptions that led to this situation. The culture change must address the underlying issues, as rehiring a new CEO alone will not resolve the problem without first addressing the current situation. Schein's conceptual framework aims to facilitate the rules that guide "daily actions, which influence organizational structure and workplace dynamics" (Asare, 2025).

Schein's theoretical model focuses on the organization's culture, emphasizing leadership and shared values, which significantly influence organizational progress (Saeed, 2023; Asare, 2025). Fostering an adaptive and unified organizational environment through structure and cultural norms enables leadership development and organizational growth, as leaders embody the company culture and shared values, shaping company practices (Asare, 2023). Schein's theory of organizational culture focuses on the artifacts, espoused values, and the underlying assumptions that can influence performance and ethical concerns. Schein's model aims to help organizations navigate cultural complexities and foster pro-growth, resilient organizations.

Competing Values Framework (CVF)

The Competing Values Framework (CVF) focuses on a set of values and priorities for managing organizational change, improving overall performance, and fostering a more resilient workforce. While innovation has been a key driver under the visionary leadership of THI, this framework is an adaptive choice for studying innovation to maintain a competitive advantage. The CVF model aims to support processes that "promote innovation and employee behavior, which stimulate performances" (Zeb et al., 2021). The CVF model categorizes organizational effectiveness into two main dimensions: adaptability versus control, and internal values versus external events. Flexibility versus stability and power, which aims to prioritize adaptability and innovation versus order, efficiency, and probability (Osei et al., 2023). The internal focus examines processes, people, teams, and culture that prioritize customers, market branding, and competitiveness. Furthermore, it is essential to focus on external factors that can be examined to understand collaboration between suppliers and customers, thereby enhancing sustainability performance (Pagell & Wu, 2009).

The Competing Values Framework CVF examines organizational matters in four distinct parts: clan culture, adhocracy culture, market culture, and hierarchy culture. Clan culture emphasizes teamwork and supportive working environments, with employee satisfaction as a top priority for delivering high-quality service and boosting productivity. A united team through team cohesion and collaboration enhances productivity and innovation (Salas et al., 2015; Grossman et al., 2022). A cohesive team offers the benefit of improved productivity to an organization, which shares a "drive to want to work together and stay together" because those who do not feel a sense of belonging in the team

tend to be less motivated (Salas et al., 2015; Casey-Campbell & Marten, 2009; Beal et al., 2003). Adhocracy culture is embedded in the entrepreneurial stage, where it emphasizes innovation through creativity promotion and a risk-taking mindset that fosters flexibility and growth, thereby enhancing market advantage and competitiveness (Yu & Wu, 2009; Gong et al., 2022). This type of culture attracts visionaries and innovators who are willing to take risks and adapt quickly to market changes, as is the case with THI's CEO and talent team (Maheshwari et al., 2024). Lastly, Yang et al. (2022) state that the adhocracy approach tends to have an external focus on continuous adaptability to stimulate creativity. Rational market culture prioritizes productivity, competition, and market advantage by using metrics to measure profitability. However, the rational model exhibits "limited flexibility in adopting new processes," and changes happen only when necessary (Rubio-Andrés & Abril, 2024). Furthermore, this approach is reward-based, using incentives to drive employee competition and achieve milestones (Cao et al., 2015). Lastly, the hierarchical culture is rooted in an internally focused structural environment characterized by order and controlled monitoring (Osei et al., 2023). Leadership style tends to be directive, with effective communication, and fosters "centralized decision-making" to maintain stability (Osei et al., 2023; Zu et al., 2010; Cameron & Quinn, 2011). Osei et al. (2023) state that centralized decision-making fails to motivate employees and limits their options. At the same time, this approach fosters result maximization through a high level of control (Osei et al., 2023; Cameron & Quinn, 2011).

THI has been led by an adhocracy approach, which has not proven beneficial in the long term. The CEO's primary driver has been innovation, but this has not yielded a stable solution or a knowledge management system for THI. The (CFV) approach shifts from a balanced leadership approach to one that fosters development, collaboration, improved morale, and a resilient workforce. The CFV is a crucial approach because it allows organizations to assess the current cultural behavior, detect misalignments, and work toward cultural enhancements. Furthermore, the CVF enhances performance and team collaborations to align with the organization's objectives. Lastly, it facilitates organizational change by bridging gaps and adapting to shifting market needs, thereby maintaining a competitive advantage.

Change Management Theory Application: The ADKAR and Lewin's Three-Stage Model

Change is important; how we embrace it determines whether it will demonstrate success or failure. Fostering structural change drives adaptation, cost savings, employee development, and greater job satisfaction while leading to a more resilient organization. The models enable effective processing of change. The ADKAR model takes an individualist approach while addressing the human

element of the crisis, including low morale and fostering potential resistance among the remaining THI employees. Gratiela et al. (2016) state that the ADKAR model distinguishes change between three key phases: the current state (how things are done in the present), the future state (how things will be done after the change has occurred), and the transition state (the process of moving from the current state to the future state. The ADKAR model serves as a "diagnostic tool" to help managers, employees, and teams transition to change while creating an action plan for growth and development (Goyal & Patwardhan, 2018). The ADKAR model benefits employees by fostering individual development during organizational change. By prioritizing employees, the ADKAR model helps minimize resistance to change and accelerate implementation by allowing for employee input and collaboration while fostering employees' desire to be part of the change. Therefore, this model recognizes the need to change through awareness and understanding of why change is crucial (Gross & Adam, 2021; Anusi & Mutambara, 2022). It is essential to explain to THI staff and the talent team that the exodus has resulted in potential intellectual property losses and that there is a strong need to rebuild its processes. Furthermore, employees should be motivated to embrace change, as desire is the willingness to support and engage with it (Hiatt, 2006). The new leadership of THI should remain engaged with employees and foster a more stable work environment, as building a resilient company is essential. Knowledge represents information, training, tools, and skills needed to embrace change (Hiatt, 2006; Kikoski, 2004; Lassey, 2004). Reliable methods help when building teams, creating and transmitting knowledge, which are seen as effective means (Kikoski, 2004). The ADKAR model represents the ability to turn knowledge into action, enabling a team to demonstrate change by ensuring employees have the skills and resources to produce (Hiatt, 2006). Continuous feedback and coaching are crucial for ensuring that employees adapt to the new changes. In this part, it is essential to provide the THI employees with coaching, time, and tools to develop the latest skills for team or project success. Lastly, reinforcement focuses on the assurance that external and internal factors can sustain the new changes, while providing performance metrics that indicate whether the change is sustainable (Hiatt, 2006; Lowery, 2010).

The ADKAR model helps manage change on the human side, including how employees expect and adapt to it, to make it effective and sustainable. For changes to take place, individual focus and attention to individual needs are required to foster supportive environments that will embrace change. A structured approach is the most psychologically healthy and holistic approach, through planning, effective communication, training, and enabling effective management strategies to achieve objectives. Lastly, the ADKAR model provides metrics to track adaptation to company changes and, at the same time, fosters evaluations of employee adaptation to change.

Lewin's Three-Stage Model treats change from a higher-level framework, whereas the ADKAR model is people-focused, ensuring they navigate change and the transition successfully. These models are beneficial when used together at THI. Lewin's Three-Stage is considered an effective and practical model for guiding organizations through transitions. This model examines the factors to be considered during change and is structured into three stages—unfreezing, transition, and refreezing—that play a critical role in strengthening an organization. Lewin's Three-Stage model will help Touchstone establish crisis management team processes through a structured transition, creating room for the new to enter and raising sustainable teams. The unfreezing stage is the initial stage, preparing the organization for the upcoming change by breaking down and "recognizing human behavior as a mindset" (Fisher, 2022; Cummings et al., 2016; Kent, 2011). In this stage, leaders should create a supportive environment that addresses resistance, ensure change occurs, and implement new policies to enhance the organization, as change can be complex and achieving equilibrium should be achievable (Fisher, 2022). In fact, to be open to change, organizations should "implore all available resources" to motivate employees through open communication and collaboration (Fisher, 2022). This phase of the model accepts the transition to change in practice, while leveraging expertise and focusing on selecting leaders empowered to inspire change (Fisher, 2022; Cummings et al., 2016; Kent, 2011). In fact, this phase involves transitioning and implementing through practical methods, such as hiring initiatives or documenting knowledge, and involving IT teams to secure intellectual property. Lastly, the refreezing phase formalizes and rewards new behaviors, processes, and policies, and the organization can reach equilibrium (Fisher, 2022; Cummings et al., 2016; Kent, 2011).

This model's benefit is that it is practical and effective, minimizing implementation risk and avoiding organizational disruption. Furthermore, this method is sustainable for development and stability because it encourages long-term growth, structure, and natural solidification. However, building a fresh, innovative mindset requires developing lasting capabilities to grow and stay ahead of competitors. Lewin's three-phase model offers "a valuable approach to re-educate, engage and motivate change within the organization" (Fisher, 2022). Organizations or employees can block change through resistance to old methods, but by embracing innovation and being open to feedback and collaboration, they can foster improvements and market opportunities. Lewin's three-phase method enables leaders to focus on the psychological dimensions of change by recognizing the importance of preparing for transformation, guiding teams through the transition, and reinforcing new behaviors to achieve lasting success.

COSO Enterprise Risk Management Framework

The chosen enterprise risk management (ERM) framework is COSO because it supports effective governance within an organization. Using this, the COSO ERM framework can methodically address THI issues related to talent poaching, knowledge loss, and market competition advantage. This framework is crucial for integrating risk management into strategic planning, operations, finance, regulation, and reputation, thereby establishing a holistic approach to risk assessment (Moeller, 2007; Moeller, 2011; Bowling & Rieger, 2005; Akinsola & Kingsley, 2025). The COSO ERM framework aims to enhance decision-making by helping identify and evaluate the THI strategic objectives and fostering a culture of proactive risk management to seize opportunities (Riyadi et al., 2021; Akinsola & Kingsley, 2025). The COSO ERM framework fosters accountability through effective communications and defined individual roles and responsibilities to mitigate risk (Riyadi et al., 2021). Lastly, the COSO ERM framework fosters risk awareness, enabling organizations to be more diligent in achieving their strategic objectives while maintaining their organizational reputation (Riyadi et al., 2021; Eckert, 2006).

Furthermore, there are five components to the COSO ERM. First, the governance and culture of THI aim to analyze the failure of the visionary CEO, who did not adequately plan for the loss of the CEO and the talent team, fostering a risk-aware culture (Becker, 2025; Rasedi, 2023). Implementing a new organizational structure allows THI to centralize power by breaking down silos and decentralizing authority, or avoiding over-reliance on any single leader or team (Albert, 2025; Morgan et al., 2019). Secondly, it is crucial to align strategy and objectives, as the previous strategy failed to account for key talent or knowledge loss. The Touchstone objective is to drive technological innovation and to remain competitive in the telehealth industry. It is essential to identify talent as a strategic risk and to recognize talent retention and knowledge management as key to achieving the THI's objectives by establishing a long-term plan for talent retention and knowledge institutionalization through a general knowledge-sharing environment (Delong & Davenport, 2003). Thirdly, identifying and assessing performance and how to respond to risk when the mass employee exodus occurred at THI. In this performance step, it is essential to identify all risks related to talent, knowledge, and intellectual property, using turnover rates and dependencies to assess sensitive data, because this step requires a development plan, whether an organization is hit with employee mass exodus, data breaches, cyber threats, technological malfunctions, or CEO departures. Fourthly, the review and revision step should establish Key Risk Indicators (KRIs) to help monitor employee satisfaction and collaboration, thereby detecting early signs of employee exodus. This would allow for identifying risk exposure at an early stage and can allow for improvement through measures such as revising talent management or using

feedback from the remaining employees (Davis et al., 2016). Lastly, Touchstone Innovation should communicate information effectively to enhance reporting tools across the organization. Creating transparency and enhancing open communication, which encourages employees to voice concerns without fear of reprisal (Alderman, 2012; Scott-young, 2014; Hubbart, 2024). Communication should be confident and transparent with internal and external stakeholders, enabling employees, customers, and investors to plan for the future (Mishra, 2014). COSO ERM would not only allow risk assessment but also enhance reporting to leadership through retention metrics and succession planning.

Problem Solution

The solution to the THI requires a multifaceted approach to address legal, operational, and employee retention issues, which necessitates an enterprise risk management COSO knowledge strategy and a Kepner-Tregoe (KT) model for a rational, structured approach. The THI solution should combine legal enforcement, knowledge transfer, talent rebuilding, cultural change, and risk management strategy. The healthcare industry requires a structural approach that delivers ethical, operational, and innovative solutions while creating value-based competition. Touchstone Innovation will need to establish a firm legal action and a critical legal framework for damages and intellectual property. Such will provide a path to enforce non-disclosure and non-compete agreements, which aim to protect businesses through proper legal mechanisms and "safeguard proprietary information, trade secrets while maintaining competitive advantage" (Prakarsh et al., 2024; Moro-Visconti, 2024). Non-compete agreements aim to reduce employee turnover and foster loyalty and commitment by making employees aware of a company's legal knowledge that they should refrain from unethical conduct (Clarke, 2025; Moro-Visconti, 2024). Moreover, the legal agreements aim to maintain a competitive advantage by preventing "industry-specific" skills and knowledge acquired by employees from benefiting in "direct competition" (Moro-Visconti, 2024; Clarke, 2025). This established legality instills confidence in employers that their vested employees will not misbehave or otherwise harm the companies that invested in their development.

1. Establish talent, build teams, and appoint an interim CEO.
2. Offer competitive bonuses and raises for key personnel.
3. Implement transparent and effective communication.
4. Launch a structured knowledge transfer program to document remaining expertise.
5. Enforce the non-disclosure and non-compete agreement through a "cease-and-desist" letter in cases where evidence is found of trade secrets, source code, or AI models being disclosed or used in violation, because these notifications warn the new employer against the usage of stolen knowledge.

6. Enforce intellectual property (IP) protection and non-compete clauses.
7. Conducting a full-scope forensic investigation in IT audit for the departed employees would allow the IT department to identify and revoke access, gather evidence of data theft, and determine whether any unusual data transfer may have occurred (Smith, 2009; Kearns et al., 2011).
8. Securing the existing intellectual property documentation, copyrights, and patents while implementing software to monitor data movement within the network (Tosato, 2018; Harris, 1999; Smith & Mann, 2004; Lindberg, 2008).

It is imperative to structure knowledge transfer to capture the remaining expertise of current employees. It is essential to identify the specific skills the talent team contributes and focus on critical knowledge areas.

9. Promote structured elicitation sessions in which the remaining IT experts conduct and record video walkthroughs of complex issues to document difficult tasks. Structured elicitation sessions are common in the healthcare field (Harman et al., 2024; Bojke et al., 2022).

In these situations, the experience of experts is essential because it helps decision-makers make sound decisions, as this method captures expert beliefs (Bojke, 2022). Next, it is crucial to leverage AI through internal platforms or AI-powered tools to aggregate, validate, and manage the documented information, making it accessible to existing and new employees (Prakassh et al., 2021; Nahar et al., 2024; Mudunuri et al., 2025).

10. Establish a mentorship program that helps pair talented employees with new or transitioning leaders to facilitate knowledge transfer through hands-on guidance (Appiah et al., 2025).

Furthermore, the mentorship framework serves as a roadmap for cultivating practices and supporting employee development and collaboration (Appiah et al., 2025). It is imperative to remain competitive, rebuild talent, and adjust to cultural shifts to maintain workforce stability, retain employees, and attract new ones.

11. Foster transparent communication to build morale among current employees and to have a clear plan for the recovery phase, as this helps to rebuild trust and morale (Geetha, 2024; Vemuri, 2024).

Vemuri (2024) states that trust and collaboration are competencies to guarantee organizational success. Trust allows teams to work together, collaborate, and share information and data to solve work-related matters. Moreover, transparency and collaboration ensure higher job satisfaction and improvements within a company (Vemuri, 2024).

12. Review the competitive and benefits compensation packages of a competitor company to ensure that THI's "package remains competitive" (Hansen, 2007).
13. Enhance and offer flexible work options packages for the employees.

Employees tend to choose flexible work options, professional development programs, and higher salaries because of competitive selection for better employees (Hanseen, 2007). It is crucial to create clear career pathways and provide opportunities for the remaining employees to step into leadership positions (Jenkins & Spence, 2006; Carter et al., 2009; Griffith et al., 2019). Lack of career growth is a significant reason why talented employees depart companies or organizations. It is essential to recognize employee satisfaction and implement effective retention strategies because voluntary employee exodus is a capital investment cost for the organizations (James, 2012). As James (2012) stated, employee retention encourages employees to remain with the organization for as long as possible and benefits both organizations and employees. Furthermore, there is a causal relationship between "job satisfaction and organizational commitment: satisfaction precedes commitment", which in turn precedes satisfaction, thereby enhancing employee turnover (James, 2012; Singh, 2019).

14. Implement proactive risk management through the COSO ERM framework to ensure resilience and to prevent future recurrences. Conduct an early-stage root cause analysis of the issues driving the CEO and talent team exodus, and integrate key talent retention as a primary risk through monitoring employee engagement turnover.

15. Foster intellectual property respect and hold meetings to train employees on the importance of IP agreements' confidentiality while emphasizing personal responsibility in protecting the company's trade secrets and protecting financial assets.

Implementing these best-practice steps helps restore operational capacity and build a resilient foundation for innovative solutions. Implementing these changes will require a clear, actionable, and timeline plan.

Action Plan Timeline

- **Week 1-2 (Immediate):**
    Appoint an interim leader to foster structure and discipline
    Hold employee meetings throughout the departments
    Reorganize teams
    Use effective and transparent language
- **Week 3-4 (Immediate):**
    Involve legal counsel
    Issue Cease-and-desists letters
    Conduct IT forensics audits
- **Month 2-6 (Recovery):**
    Launch recruitment of new hires
    Launch trainings and document knowledge
    Revise and enhance the compensation package

- **Month 6-12 (Prevention):**
    Establish mentorship programs
    Establish an ERM process for a succession plan
    Establish a new company culture, such as rules and procedures
    Foster periodic training
- **Year 1 (Metrics):**
    Establish effectiveness and evaluation metrics
    Establish employee engagement scorecards through surveys to ensure employee morale and job satisfaction
    Establish employee retention rates for employees who stay with the company
    Establish favorable IP litigation to protect IP regulations

Conclusion

The THI case highlighted a business challenge in the fast-moving, technology-driven, knowledge-based industry, where innovation and talent teams are key to maintaining a competitive edge. The core issue was the mass departure of key executives and talented employees to a direct competitor, raising concerns about the loss of knowledge and IP damage. In a highly competitive tech market where AI is used to improve telehealth services, talent is scarce yet highly valuable. In this environment, innovative executives and talented teams were lured away by better pay and more forward-looking career opportunities. While non-compete agreements and trade secrets help protect companies, they also prevent rivals from engaging in unethical practices while adhering to legal boundaries. The second part of the issue was that THI had been overly dependent on key personnel, creating a significant risk to the organization's knowledge base. This reliance on a single person or team fostered a knowledge vacuum, leaving undocumented knowledge procedures vulnerable. The loss of critical expertise caused a significant disruption at THI due to the lack of institutionalized processes, proper training documentation, and a knowledge-sharing system. This situation led to failures in strategic planning, management, and enterprise risk management, as the departure of talent threatened the organization's existence. The inadequate retention strategies were insufficient to retain talent and prevent strategic failures. This problem required the best practical solution, achieved through a decisive, multifaceted approach to operational recovery that enhances stability and long-term resilience.

The THI case highlighted that knowledge, intellectual property, and talented personnel are valuable assets to a company. However, over-reliance on a single visionary CEO, without documenting that knowledge, created existential risk. Furthermore, having an ERM in place would have mitigated the issue by identifying key talent retention and intellectual property security risks. Filing an

intellectual property lawsuit and undertaking a robust talent-hiring spree are effective ways to drive culture change and enforce risk assessment.

The KT structured method of solving plays a crucial role in situation analysis, enabling a structured evaluation of complex, ambiguous situations, such as the CEO departure, the engineering team loss, and intellectual property contamination, thereby preventing hasty decisions and erosion of market competitiveness (Markopoulos, 2022; Nakamura, 2005). Furthermore, KT encourages critical thinking and collaborative team decision-making to robust problem-solving and to prevent future talent losses within THI.

The ADKAR change management model plays a critical role in establishing (Awareness, Desire, Knowledge, Ability, Reinforcement) to guide organizational transition of Touchstone Innovation and strengthen ERM in the rebuilding process (Houben et al., 2020). Moreover, the COSO ERM framework will provide a structured approach to integrate and provide a strategic risk management by employing key performance indicators (KPI's) and key risk indicators (KRIs) for employee turnover, crucial to risk management and the rebuilding of THI (Stasse et al., 2025; Lucht, 2023; Shumilo et al., 2024; Bhatti et al., 2014).

The establishment of the strategic plan, guided by the theoretical framework and the mentioned models, has informed the action plan for the recommendation process. An organization that establishes a strategic plan and fosters adaptability and flexibility responds to market changes while enhancing resilience (Eppink, 1978; Awais et al., 2023). Establishing strategic flexibility and adaptability enables organizations to utilize resources and gain a competitive advantage amid uncertainty (Awais et al., 2023). THI needs "to adapt to the environmental turbulence through positive changes and foster an innovative influence (Wei et al., 2013; Awais et al., 2023). Organization adaptability allows for "rapid knowledge diffusion to reallocate resources" in ever-changing environments to prioritize market competitiveness (Awais et al., 2023).

Strategic planning enhances operational efficiency and improves productivity by enabling organizations to build knowledge and new skills in an uncertain business environment (Awais et al., 2023). Such serves to provide guidance and direction through a structured, disciplined approach to wiser decision-making through resource allocation, allowing the organization to align with its objectives and missions. Establishing long-term sustainability requires strategic planning and structural frameworks that necessitate ongoing assessments and adjustments to meet organizational objectives and create a balance between strategy and operations. However, the THI setback presents an opportunity to centralize knowledge, rebuild resilience, and foster transparent cultures to achieve sustainability and long-term stability through implementation of structural and cultural change to prevent organizational failure.

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