

The Ideal Group Exercise Works: Vistage Chair Patricia Allgood Shares Her Success

Patricia successfully implemented the Ideal Group exercise in her CE group in May 2013. The timing was perfect, as two group members were leaving – one moving overseas and the other having sold his company. To find replacements, Patricia used the Ideal Group exercise to guide her CE members in considering what new industries and perspectives would most benefit the group as a whole. Rather than ask for names of prospective member candidates, Patricia asked them to focus on what types of member companies they would like to have represented. As a result of the exercise, two new members were gained that same month.



Patricia Allgood

Vistage Chair since 2002

Groups: 2 CE, 1 KEY, 1 VI

"If you ask for just a referral, it's too broad of a question," says Patricia, "If you ask someone if they know anyone in manufacturing, for example, that's easier for them to home in on. The Ideal Group is a great mind-jogging exercise that helps members to better gauge and identify the true traits wanted in a candidate for a strong referral."

Patricia led a healthcare software company whose product was recognized as one of the most successful software systems in the healthcare field. Later sold to a Fortune 1000 National Data Corporation, Patricia continued on as Vice President. She is currently a technology consultant whose list of clients includes Coca-Cola, Asea Brown Boveri, J.M. Huber, and Bell South.



Engaged and enthusiastic, seven of Patricia's thirteen group members provided referrals targeting candidates from the technology and banking industries. Collectively, the group decided they wanted candidates who would bring experience specifically from the IT Services standpoint to add perspective and insight. Of the referrals, two new members were gained within the same month of the Ideal Group exercise and they continue to remain active members in the group. Both new members come from an international background and are bringing diverse expertise and perspectives that enrich the group's discussions. "Vistage did a great job of putting together the Ideal Group exercise and process. Following the models they provide was very helpful, and it should be an annual incorporation for all Chairs," says Patricia.

The advice Patricia has for other Chairs considering the Ideal Group exercise is simple: "Just do it. Our members are here for a reason, they are getting value out of it. Remind them that the best groups come from referrals. I prefaced the Ideal Group exercise with that. Just about every one of my members is from a referral to begin with."

Patricia's best practices for implementing the Ideal Group exercise:

- **Narrow the scope.** Ask members to list the types of companies and areas of expertise they'd like to have represented in the group. Encourage them to think about what type of experience will bring the most added-value, and then ask for referrals from that specific industry and background.
- **Use the Vistage model.** Take advantage of a tried and true standard of approach, utilizing the materials and process provided. No need to re-invent the wheel, but feel comfortable in making adaptations that best suit your group's culture.
- **Consider making the Ideal Group an ongoing, or at least an annual exercise.** Spark continued group growth by re-evaluating what industries are missing from and could strengthen the group with diversity in perspective and knowledge.

Visit vistage.com/idealgrouppresources for more information.



"I'm a big believer that your strongest members come from referrals. The Ideal Group exercise made members stop and think about the significance of that. If you refer someone to a group, it's a recommendation and affirmation of your participation in the group."

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