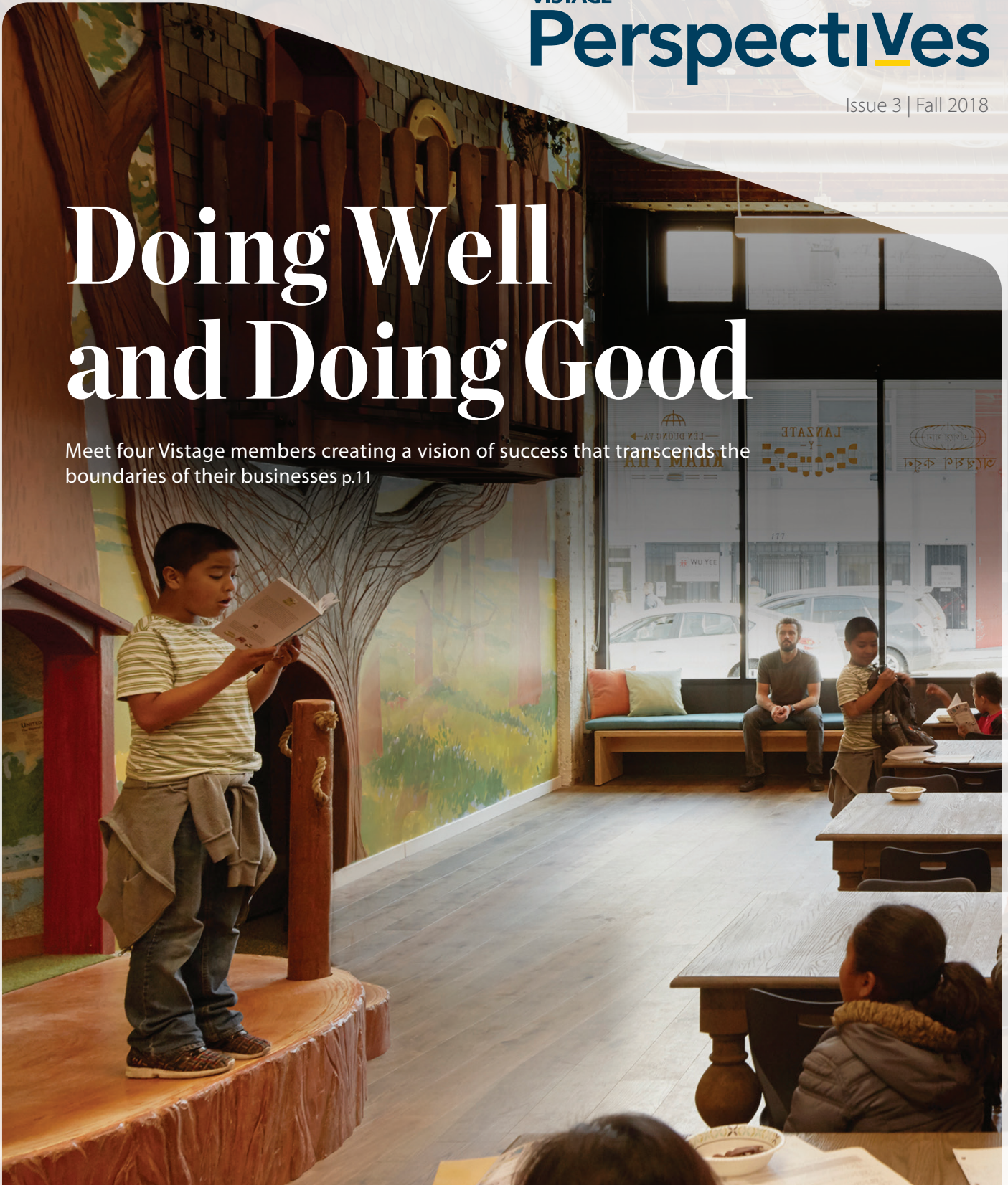


# Doing Well and Doing Good

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Amber Olsen's daughter, Willow, dressed as Supergirl



Amber Olsen's daughter was diagnosed with multiple sulfate disorder, an obscure and terminal genetic condition.

Making an Impression

## A Team in Her Corner

When the diagnosis came, Amber Olsen was overwhelmed. In May 2016, doctors determined her then two-year-old daughter, Willow, had multiple sulfate disorder (MSD), an obscure and terminal genetic condition. The disease would rob her of key milestones: first words, first dance recital, first graduation and potentially her 10th birthday.

Olsen, who knew little about gene therapies or medical funding, nonetheless vowed to do everything in her power to find the cure — while caring for her daughter and running her staffing agency, the Mississippi-based NEXTAFF Gulf Coast.

She summoned the courage to turn to her Vistage group with her situation. “It had impacted my whole life, and perhaps my ability to continue with my business and the group.”

Joe Liss, Olsen's Chair, helped her broach this challenge with the group in an emotional meeting. “We were moved to help Amber however we could. I also came to see it was important that we help her as a businesswoman,” Liss says.

Outside of regular meetings, the group formed a tiger team to help Amber fight for Willow.

The pieces quickly fell into place: In a remarkable coincidence, a fellow member knew another child with MSD and connected Olsen to researchers who had identified the mechanism of the disease. An attorney in the group helped Olsen establish a 501(c)3 nonprofit, the United MSD Foundation. Members called on their public relations and marketing connections to gain traction with media.

Thanks to money raised and the tiger team's persistent efforts over two years, researchers are nearing a viable gene therapy. However, Olsen is realistic about Willow's prospects. “Since we started, her condition has worsened. We are aware we may be finding a cure for future generations.”

She hopes that a therapy can be found in time to at least arrest Willow's MSD. And she can now confidently state their progress: “If we reach \$3 million within a year, there's a very real chance we can stop Willow's disease. A cure is possible. It's been done before, and we'll do it this time. It's just a matter of when.”

“

“A cure is possible. It's been done before, and we'll do it this time. It's just a matter of when.”

Amber Olsen  
Vistage member since 2015





Dear Vistage Member,

Every week, without exaggeration, I am amazed by success stories from our community — entrepreneurs who’ve defied the odds to launch businesses, CEOs who’ve turned around failing companies, business owners who’ve discovered innovative ways to grow.

In many cases, these achievements benefit more than just the organizations themselves. There’s a ripple effect felt among families and throughout communities. These successes are about doing well *and* doing good. For those in the nonprofit sector, already in the business of “good,” it’s about doing even better.

In this issue of Vistage Perspectives, we’re highlighting stories of members who’ve made great decisions that benefited their companies, families and communities. They range from the president of a coffee company that disrupted the traditional supply chain model to the business leader who’s taking innovative approaches to end veteran homelessness. Our chief research officer also breaks down how purpose can be the driving force behind performance.

I hope you feel as inspired and proud of the caliber and integrity of our community as I do. Enjoy this issue of Perspectives.

Best,

Sam Reese  
CEO, Vistage Worldwide

## Doing Well and Doing Good



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Vistage recognizes standout members and Chairs

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Around the Community

## What Business Advice Would You Give Your 23-Year-Old Self?



**Everything is about the user experience of your customer.** Make your customers' experience as positive as possible. Meet them on their terms, in their place. Address their stated concerns, not what you think their concerns are. Communicate clearly and honestly. Never make excuses. (Anything that comes after "I'm sorry" will sound like an excuse, even if it is completely true.) If something didn't go right, and you could control or prevent it, say you're sorry; say you will try to do better in the future; fix the problem; and then ask the customer what you can do in the future to help you avoid making the mistake again.

*Matt Johnston, founder, Law Offices of Matthew S. Johnston, LLC  
Frederick, MD  
Vistage member since 2018*



**Create your own definition of success up front.** Recognize that every decision comes with a cost; know what success looks like for you and your company at any given stage; and get comfortable behind the cost-benefit trade-offs you will face. Then make your decisions based on how well they support your definition of success. And remember that the only constant is change — so allow your "success" definition to evolve!

*Allison Wood, CEO, LCMS Plus Inc.  
Durham, NC  
Vistage member since 2016*



**Have a vision. Repeat it often.** For prospects, clients, your team — you need to tell people things at least seven times. Doing so creates an ongoing process of alignment. It's easy to feel redundant, but people simply don't hear things the first couple of times.

*Victoria Cabot, Velocity 6  
San Diego, CA  
Vistage speaker since 2014*



**Foster appreciation.** We can learn from everyone, even when we don't get what we want. We didn't get the order, the assignment, the loan or the investment. The employee didn't do what we wanted. I didn't appreciate what I could learn from these experiences and didn't thank the other person for the opportunity to get better because of the experience.

*Jeannette Hobson  
Elizabeth, NJ  
Vistage Chair since 1995*



**Leadership is only as good as what we accomplish — specifically, in terms of meaningful and measurable results.** Leadership is necessary — maybe even essential — to building and growing a sustainable business organization. Unless we effectively manage what the people we lead actually accomplish and produce, advancing any organization forward is like navigating a ship in absolute darkness without the guidance of instruments.

*Philip Liebman  
Monroe, NY  
Vistage Chair since 2006*

Points of View

## How Do You Tap New Pipelines of Talent?



In survey after survey, Vistage members report that finding talent is a top challenge. We found two members who took different innovative approaches to hiring that helped both their companies and their communities.



**Chuck Nalon** is division president of Ed Miniati, LLC, in South Holland, Illinois, which provides value-added meats to restaurant chains and consumer packaged goods companies.

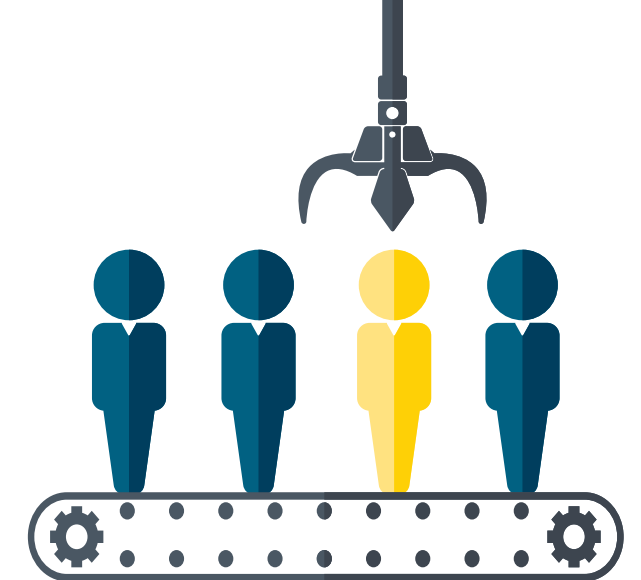


**Kelli-Marie Vallieres** is president of Sound Manufacturing, a precision sheet metal contract manufacturer, in Old Saybrook, Connecticut, and president of the Eastern Advanced Manufacturing Alliance, representing 70 manufacturing members.

### Q. What was your path to finding new talent pipelines?

**Vallieres:** I've been working to launch and support educational programs at community colleges through the Manufacturing Pipeline Initiative (MPI) and Connecticut Advanced Manufacturing Initiative (CAMI). It's very difficult to find people who have the skills we need, so I look to these programs first for all new hires. We've recruited three students from the CAMI program, for example, and even sent three Sound Manufacturing employees to learn new skills.

**Nalon:** My Vistage Chair introduced me to the concept of inclusion and disability hiring. This led me to send my senior vice president of human resources to the Harkin International Disability Employment Summit. There, she connected with a firm that specializes in establishing a framework for employers to conduct such hiring and accommodate new workers.



### Q. How has this talent development process benefited your company?

**Vallieres:** Since last November we've hired 10 employees, going from 66 to 76. Seven of them came right from the educational programs, where they gained the applicable skills, to our manufacturing floor. At Three Rivers Community College, I taught a workforce development class, and my engineering and quality managers each taught technical classes in the campus labs. We got to show students what employers value in candidates.

**Nalon:** We have 14 employees with disabilities in the program out of 650 employees in the factory. They are deaf, have learning issues or are missing limbs. I have a staffer who oversees the disability hiring program. Since factory jobs are tough, we set up a workshop to help our supervisors understand how to best help our employees with disabilities succeed. Everyone here has started to embrace this. It's inspirational.

### Q. How has your approach had a positive impact on your community?

**Vallieres:** By advancing and supporting these educational programs, people in our community are finding employment. CAMI has a 98 percent placement rate. MPI has placed 1,000 people at 137 companies since its inception. Legislators have earmarked \$50 million to expand this initiative throughout Connecticut to service the manufacturing, healthcare and aerospace fields.

**Nalon:** We've had requests from nearly 50 candidates with disabilities who come to us through local nonprofits that understand their needs and potential. Working with them helps make a difference in the community. We screen candidates based on their ability to perform the job. We're looking to keep hiring great people with disabilities, and I'm happy to help other Vistage members who are interested in doing the same.



# Your Business. Our Responsibility.

By Mark D. Goodman, Vistage Chief Marketing Officer

You have the weight of your business — and the world in which it operates — on your mind and on your shoulders. Helping you with this heavy responsibility is our No. 1 priority and the root of our strategy. It's on our walls and on our minds: We exist solely to help you make great decisions that benefit your company, family and community.

We strive to offer the most comprehensive, effective approach for executive growth and development. One of our biggest priorities is to provide you with more perspectives from high-integrity leaders in your area and around the globe.

As a Vistage member since 2010, I've experienced the benefits of powerful questions and eye-opening insights from fellow members, Chairs and speakers. I believe every high-integrity business leader we add enriches our community, because they bring a wealth of expertise and fresh perspectives that they're willing to share. Our global footprint has expanded to include peer advisory groups in Spain, Paraguay, Uruguay and the Netherlands. We now have more than 22,000 members in 20 countries. Vistage Networks ([vistage.com/membernetworks](https://vistage.com/membernetworks)) offer the opportunity to connect and get real-time answers to your questions from those in the global community who are in your industry or share your interests.

You may have also noticed Vistage insights appearing more frequently in your Wall Street Journal and business journal, or the logo on the collars of three world-class PGA golfers. These efforts are, again, with the express intent of creating awareness among high-caliber business leaders — those who embody the Vistage ethos of rigor in decision-making, who pursue excellence relentlessly, and who contribute willingly to the success of those around them.

We also are creating more events to help you expand your network and knowledge base. In addition to the inspirational, large-scale Vistage Executive Summits, we have hundreds of new, more intimate events. Some provide deeper learning experiences on key business challenges, such as talent and finance. Others are social outings that foster connections with business leaders beyond your group. And if your business has you traveling, check out [vistage.com/events](https://vistage.com/events) for workshops and get-togethers at your destination.

These developments are just the start. Your feedback in the 2018 Member Insights Survey gave us valuable input on how we can make your Vistage experience even more meaningful and effective. Thanks to all members who took the time to share their perspectives.

We exist solely to help you  
make great decisions that  
benefit your company,  
family and community.



Charley Hoffman, Vistage brand partner and four-time PGA TOUR pro



Vistage members Brad Kopitz (Impact Award winner) and Ray Singleton (Lifetime Achievement Award winner) seated on stage at a Vistage Executive Summit in Denver, Colorado 2018.



Krista Morgan, Vistage member since 2016



# The High Road

## Chair Guillermo Hysaw met his adversaries at the bottom line

In 1972, Vistage Chair Guillermo Hysaw accepted a job as district sales manager for General Motors. They assigned him a standard-issue starter territory, comprising Mississippi and portions of Tennessee, and armed him with a briefcase and a .357 Magnum — not standard-issue for district sales managers. They wished him good luck.

“This was the ‘70s, so Jim Crow was still in effect,” Hysaw says. “The first dealer, I reached to shake his hand, and he just stood there.” The novice district manager was not deterred. “I sat him down inside the dealership and explained that there was a correlation between my black skin and the black on his financial statement. I said, ‘I don’t want to date your daughter. But that GM sign out front? I can take that sign down.’”

A few years later, the same dealer greeted Hysaw with a hug. “Under my guidance, he was winning GM-paid vacations. The whole district’s sales were better than they’d ever been. I won them all over by focusing on what I was there to do: understand scale and how it impacted their bottom line,” he recalls.

## The Black 14

Mississippi wasn’t the first place where Hysaw had to face down racism. In 1969, he participated in the Black 14 protest against Brigham Young University after the football team had compared University of Wyoming’s black players to “gorillas” and the “biblical Cain.”

Hysaw became the group’s unofficial spokesperson. “We didn’t set out to make a big statement,” Hysaw says. “When the administration put profits before their players, we came up with the idea of wearing black armbands to protest BYU bringing their beliefs and prejudice onto the playing field. That was it.”

Rather than support Wyoming’s black players, Wyoming Governor Stanley Hathaway backed coach Lloyd Eaton and fired them. The loss of talent tanked the top-ranked team and the Black 14 became pariahs. Hysaw was thrust into the spotlight. In the ensuing decades, HBO, CBS and ESPN featured him in documentaries on social change alongside icons such as Billie Jean King, Jim Brown and Kareem Abdul Jabbar.

In this way, Hysaw’s stand against racism was close in spirit to Jackie Robinson’s, as both men were “protesting” just by stepping onto the field — and later, for Hysaw, onto a dealer lot in Mississippi.



Renowned photojournalist Art Shay captured the Black 14’s stand against racism.

“

“I was able to see I wasn’t there to change his beliefs. I was there to impact his bottom line.”

Guillermo Hysaw  
Vistage Chair



Guillermo Hysaw shakes hands with President Reagan.



Guillermo Hysaw receives a service award for his contributions to the Toyota community.

## The business case for diversity

Hysaw worked his way up through the GM ranks as a sales manager, graduating from his Mississippi territory to Chicago, before accepting an executive sales position with Toyota. Here, he would again find himself making the case for inclusivity, by making the business case.

“In the early 2000s, Toyota realized they needed a more inclusive culture if they were going to attract top talent, especially millennial talent,” Hysaw says. Toyota selected Hysaw to spearhead its first diversity initiative for an unintuitive reason: He was an executive in sales, not HR. “Toyota wanted to tie their diversity initiative to a strategy that would help the business,” he explains.

As vice president of diversity and inclusion, Hysaw identified areas where the company was leaving money on the table by overlooking certain demographics. “For example, we attracted a lot of new customers by advertising that our Los Angeles dealerships spoke 36 languages.”

He also implemented numerous company-wide changes to create a more inclusive culture, such as opening non-denominational prayer rooms on campus and requiring multiple interviewers per candidate to eliminate bias. The influence of these programs was felt as far as their Japan headquarters. “Even as recently as a decade ago, there simply weren’t any Japanese female executives. That’s changed, thanks to the hiring practices we implemented in LA.”

## Success on his own terms

Hysaw has kept his focus on the bottom line, though now on behalf of Vistage members. And he continues to make the case for inclusivity.

“I created a marketing matrix for Toyota that considers anthropological, ethnographic, demographic and psychographic data. I apply this to Vistage member businesses to help them understand their existing customers and identify who they’re overlooking,” he explains.

He’s also proud to claim a diverse CEO group. “My group isn’t just racially diverse. There’s gender diversity, religious diversity and, as important, revenue diversity.”

Hysaw says that Chairing is a calling that found him, and that he feels is the culmination of his life experience. “You can’t just choose to become a Chair. You have to be invited. Chairing a group demands that I give others the full range of my education and my experience. Not some of it — all of it.”

That means sharing his experiences of racism, from which he continues to draw strength. “I was thankful that dealer didn’t shake my hand. I was able to see I wasn’t there to change his beliefs. I was there to impact his bottom line.”



# Doing Well and Doing Good

Every business leader wants the company to do well. The very point of being in business is to succeed. What defines success is the arguable point. Success means profitability, growth, happy stockholders and household-name recognition.

But what if success meant something more? What if a company placed people on par with profits and emphasized helping others as much as helping itself? And what if this new model for success created a ripple effect among fellow businesses, increasing the sense of community and motivating others to do the same? The following four Vistage member businesses illustrate this new model of success.

Each has made decisions that not only benefit the business but also benefit communities. These are organizations and professionals who seek to do good while doing well. Each member profiled here created a vision of success that transcended the barriers of their own business and sought to enrich and inspire the world around them.

## Building Connections Pays Community Dividends

Visionary builder aligns his values with his trade

When Michael Scribner was a child, he took careful note of his father's experiences in the construction business. "I watched my dad come up through the industry back in the '70s when construction wasn't the most professional business and just didn't treat its people well," he says. "Seeing that mentality, I always said, 'When I own my own business, I want it to be different.'"

Not just different — better.

Beyond just building complex structures and stunning interiors, the president and CEO of BCCI Construction has made a conscious effort to exceed standard industry practices. Over the years, BCCI has become an industry leader in sustainable building practices, completing more than 60 LEED-certified projects and three WELL-certified projects, a building standard that takes into account the importance of air, water, nourishment, light, fitness, comfort and mind.

More than just treating employees well, Scribner has created a high-performing work environment, with BCCI ranked on the San Francisco Business Times list of Best Places to Work in the Bay Area.

And more than just building business success, Scribner is building connections in the community.

With inspiration and ideas from his Vistage peers, he formed a community-builder committee charged with finding meaningful local charities to support. Each month, the committee meets to decide how to allocate funds raised and volunteer hours. In 2017,

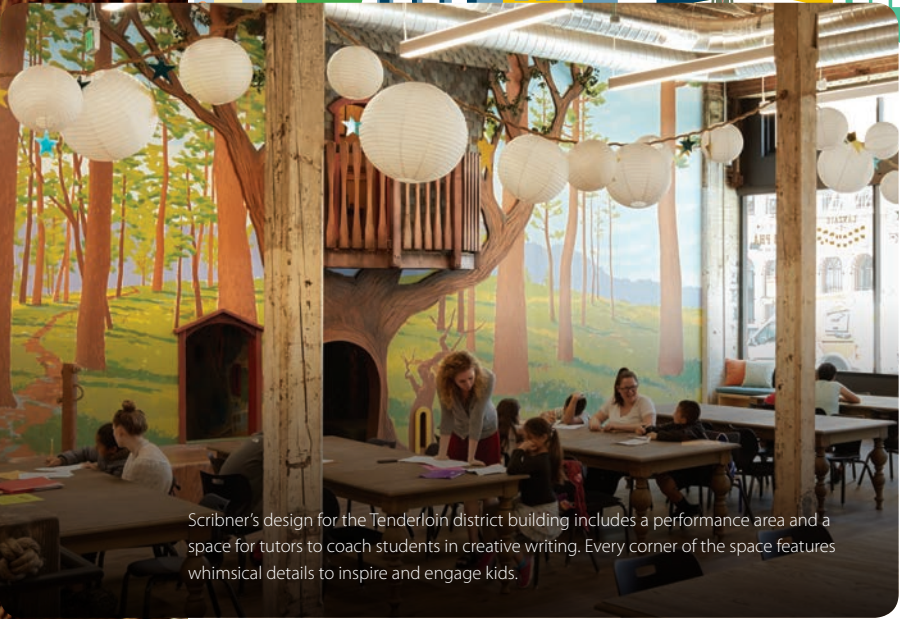
BCCI employees completed 500 hours of community service for dozens of organizations, including San Francisco Suicide Prevention, which awarded Scribner with its Altruism Award.

"Vistage continues to be very instrumental in my own learning and development, and ultimately how I view our organization, whether it's exploring how to create and develop a culture that supports its people or the benefits of giving back to the community," Scribner says.

Scribner was approached to renovate a building for 826 Valencia, Dave Eggers' nonprofit creative writing and tutorial project focused on underserved students. The new building is in San Francisco's poverty-stricken Tenderloin district. He saw this as a great opportunity to align his values with his trade. Scribner enlisted his contacts in the community and ultimately raised \$2 million in pro bono work for the center.

The property, once a downtrodden market on a crime-ridden corner, is a whimsical, engaging storefront housing a performance space, classroom and creative writing tutorial area. The transformation is thanks, in no small part, to Scribner's efforts.

"The rewarding part is the ability to give back to the community and see the results," Scribner says. "With a project like 826, you see the children in the space and the benefits that they're getting, and you feel like you've actually accomplished something to help support the cause in an area that really needs it."



Scribner's design for the Tenderloin district building includes a performance area and a space for tutors to coach students in creative writing. Every corner of the space features whimsical details to inspire and engage kids.



“

“The rewarding part is the ability to give back to the community and see the results. You feel like you’ve actually accomplished something to help support the cause in an area that really needs it.”

Michael Scribner  
Vistage member since 2008







“

“Our mission is our differentiator. The authenticity of what we do in the farming communities can’t easily be replicated.”

Tom Matthesen  
Vistage member since 2017



Rodolfo Santos receives a Thrive gift basket from Matthesen.

## Where Business and Farmers ‘Thrive’

Behind a coffee company’s new business model

The cards, photos and prayers poured in. When Thrive Farmers President Tom Matthesen suffered a concussion in a recent bus accident in his home state of Georgia, the Guatemalan farmers who grow and harvest the coffee sold by Thrive clamored to wish him a speedy recovery.

“That’s the most rewarding part of this journey,” Matthesen says. “We treat them like family, and they treat us like family.”

Through an innovative revenue-sharing model that provides a stable, predictable price for coffee, Thrive Farmers ensures higher earnings for farmers — up to three times more than the traditional model. It also provides a “halo effect” for consumers, who are increasingly seeking out brands committed to social justice.

This approach has disrupted the coffee supply chain, creating a radical departure from the standard business model of coffee growers. The traditional model had farmers responsible for growing the beans and then handing them off to another entity to be roasted, who handed them off for further processing, with each segment causing the profit margin to shrink.

The B Corp-certified company gives farmers wider participation in the entire supply chain. Rather than simply selling the beans, farmers are stakeholders in the other steps in the process, reaping more of the profit as coffee drips its way from the farm to our mugs. Farmers’ earnings are also tied to the actual end-market value of the coffee, meaning they share a fixed percentage of the revenue when a bag of coffee is sold. This gives farmers higher, more predictable and more stable income than traditional models.

“Our mission is our differentiator,” Matthesen says. “How many zillions of coffee companies are there in the world? The authenticity of what we do in the farming communities can’t easily be replicated.”

Because farmers who work with Thrive Farmers earn more than they would through traditional markets, their communities can install new dental and health clinics, create education programs, and engage in other community investments.

Matthesen, who is a member of a Vistage CEO peer group in Atlanta, often finds himself speaking with other CEOs about going beyond traditional corporate social responsibility models and baking “doing good” into a for-profit model.

“We have a foot in both the nonprofit and the for-profit worlds,” he says. “And it works.”

The sole coffee provider for Chick-Fil-A, Thrive Farmers has grown more than 8,500 percent in five years and ranked 19 on the Inc. 500 list of the nation’s fastest-growing privately held companies for 2016. Those are impressive metrics, but for Matthesen, a more compelling measure of success came in the form of those heartfelt prayers.

“It comes down to people loving people, treating them with respect and pride,” he says. “If one of our customers looks at the work we’re doing, they will then look around at their other 300 vendors and ask, ‘What are you doing?’ Thrive Farmers is leading a sea change.”



Thrive Farmers’ Edgar Cabrera Cozza, Tom Matthesen and Vinicio Gonzalez







## Discovering the True Meaning Behind the Mission

A healthcare CEO inspires team members' performance by illustrating the impact of their work

Seattle is a hiring town, a place where smart, driven workers have their choice of world-class companies. Amazon is based there, as are Starbucks, Microsoft and several other Fortune 500s.

But even in the face of fierce competition for talent, Washington State Hospital Association (WSHA) CEO Cassie Sauer discovered that by connecting her employees with the impact of their work, she could compete with the biggest companies in the world. She could also inspire her employees to reach higher.

The nonprofit association advocates for all hospitals in Washington State in an effort to improve quality and access to care. WSHA turns healthcare problems into policy solutions that protect quality of life for everyone in the state. These policies translate to greater access to healthcare, saving lives in the process.

But when Sauer was promoted to CEO after 18 years with WSHA, she discovered that many people within the organization didn't appreciate the impact their individual work made in the community.

"What really struck me was people came to work with us because they wanted to be a part of something bigger, but they would scratch their head and say, 'I work in accounting. How am I contributing?'" Sauer says.

Consulting with CEOs outside her industry through her Vistage peer advisory group, Sauer realized that she could attract and retain high-caliber employees and push them to broaden their scope just by helping them understand their personal impact.

For example, WSHA took on sepsis, a life-threatening bloodstream infection that kills more than 250,000 people a year in the United States. Sauer helped WSHA's analysts understand how their data analysis helped create a methodology that has drastically cut mortality. "Our data analysts were able to say, 'Look, there are truly people who a year ago would have been dead without our contributions,'" Sauer says. "That's an incredible thing to work on."

In the year and a half since Sauer took the helm, WSHA helped change state law to curb opioid addiction, working to end a scourge that kills nearly 30,000 people in Seattle every year. Under her direction,

WSHA also standardized charity care forms, broadening access to care for underserved patients and eliminating the language barrier for care.

As successes pile up, Sauer says she is careful to highlight the diligent contributions by everyone at WSHA. She overhauled the usual employee town hall meetings, focusing less on information like insurance benefits and policy updates and more on each department's successes and contributions.

"Our turnover has gone down, retention is up, and our impact is deeper," Sauer says. "Our team members feel like the work they do here really results in something meaningful."



“Our turnover has gone down, retention is up, and our impact is deeper. Our team members feel like the work they do here really results in something meaningful.”

Cassie Sauer  
Vistage member since 2017

Jamie Schleck, a former Army officer and West Point alumnus, works to help end veteran homelessness.



## Bridging the For-Profit and the Nonprofit Worlds to End Veteran Homelessness

A businessman's perspective on serving those who served their country

After 17 years as CEO of a successful, multimillion-dollar specialty chemical and pharmaceutical company, Jamie Schleck exited his business and faced the daunting question: What next?

The West Point graduate and former Army officer knew he wanted to focus on national veterans' issues. By coincidence, he caught an episode of "60 Minutes" that featured a West Point classmate, who was working with an organization called Community Solutions to help end veteran homelessness.

That cemented his next move.

"When I learned about Community Solutions' approach, I was immediately hooked," Schleck says. The organization uses quality improvement science and data analytics to optimize resources and improve outcomes — all skills in Schleck's wheelhouse. "I felt I had skills and resources that would prove useful," he says. So, he jumped in with both feet: as a donor, then as an adviser and then as COO and CFO.

Community Solutions partners with stakeholders to address inefficiencies and roadblocks in local housing systems, including the veterans' care system and to secure new resources. To beef up his effectiveness in addressing potential stakeholders, Schleck enrolled in the one-year Vistage Executive Leadership Program in collaboration with Stanford Graduate School of Business. The coursework on storytelling skills, in particular, has paid off.

"It's all about telling the right story to potential stakeholders to highlight an issue that might seem small but really has a big impact," Schleck says. For example, he describes nearly 300 homeless veterans in Denver who have vouchers for housing. For some of them, the only barrier to accessing the housing is a \$25 landlord application fee. "When you tell the story like that, it moves influencers to action," he says. "They can waive the fee, pay the fee or educate the landlords to do whatever it takes to fix this right now."

His recent efforts with Community Solutions focus on enlisting the help of the corporate sector, an area where Schleck feels he could be an effective bridge. "I have been in both for-profit and nonprofit worlds, and I think I understand what makes each side tick," he says.

His team identified one company in particular with headquarters in four major U.S. cities. "They want to stake a claim for ending veteran homelessness in their hometowns. And with our help, they will," Schleck says.

Further sponsorship will make seismic inroads to ending homelessness in close to 100 communities across the United States and Canada. Community Solutions is already well on its way: Seven of 77 targeted communities have ended veteran homelessness, and another three have ended chronic homelessness.

For these successes, Schleck eagerly lauds Community Solutions as well as the local organizations that work hands-on to end homelessness and the conditions that create it. He considers himself part of a greater effort. "I may have added some value with my uncommon experiences and skills, but I have learned far more from my colleagues than they have learned from me."

“I have been in both for-profit and nonprofit worlds, and I think I understand what makes each side tick.”

Jamie Schleck  
Vistage member since 2006



# The Purpose of Having Purpose

Why your company must define its raison d'être

By Joe Galvin, Vistage Chief Research Officer

Every company needs a purpose statement — and not just so they can fill space in an employee handbook. A good purpose statement can guide decision-making, inspire employees, promote engagement and even boost financial performance in a firm.

What, exactly, is a purpose statement? It's something that articulates a company's reason for being, beyond making products or services. The Kellogg Company, for example, describes its purpose as "Nourishing families so they can flourish and thrive." Disney's purpose is "To create happiness for others." Google says it exists to "Organize the world's information and make it universally accessible and useful."

Defining a purpose is not just for large organizations, however. In small and midsize companies, a purpose statement can bring teams together, strengthen culture, connect business goals with personal values and help employees realize the true meaning of their work.

## Distinguishing mission, vision and purpose

Companies tend to use the words "mission," "vision" and "purpose" interchangeably, but that's a mistake. Here's the distinction:

- ▶ **Mission** describes a company's business and deliverables. It answers the question "What do we do?"
- ▶ **Vision** articulates what is possible for a company in the future. It answers the question "What do we aspire to do?"
- ▶ **Purpose** captures why a company exists. It answers the question "Why do we do what we do?"

Take Guinness World Records, for example. It defines its mission as "To be the ultimate global authority on record breaking." Its vision is "To make the amazing official." And its purpose is "To inspire people — individuals, families, schools, teams, groups, companies and communities — of any age, in any city or country."

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“Leaders must demonstrate, through their words and actions, what it means to live that purpose. Over time, this will lead to stronger employee engagement, improved job satisfaction, and better talent recruitment and retention.”

Joe Galvin  
Vistage Chief Research Officer

## Five characteristics of a purpose statement

There's a practical reason for businesses to put purpose first: It drives financial performance. In his book "Built to Last," Jim Collins documented that purpose-driven companies tend to achieve better financial performance than profit-driven companies. His research showed that organizations with a clear purpose achieved financial returns that were six times greater than businesses that focused only on profits.

Developing a good purpose statement — one that captures the why of a business — is hard. It takes time, thought and input from individuals throughout the company. Collins argues that a good purpose statement has five characteristics:

1. It should be inspiring to those inside the company.
2. It should be as valid 100 years from now as it is today.
3. It should help you think expansively about what you could do but aren't doing.
4. It should help you decide what not to do.
5. It should be truly authentic to your company.

But creating a purpose statement is only the first step. Leaders must then demonstrate, through their words and actions, what it means to live that purpose. Over time, this will lead to stronger employee engagement, improved job satisfaction, and better talent recruitment and retention.

This ideal is reflected in a story you may have heard: Three laborers were hauling bricks on a construction site. A man stopped and asked each worker what they were doing. The first sighed and said, "I am laying bricks." The second said, "I am building a wall." The third smiled and said, "I am building a cathedral!" Connecting employees to your larger purpose will make them see their work differently — not as laying bricks, but as building cathedrals.

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At a glance



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Dale Donat  
Vistage member



# Hardwired for Success

What makes us different also makes us exceptional



Vistage Breakout Speaker of the Year Erin Peereboom doesn't believe great minds think alike. To grant participants in her workshop insight into their thinking and behavioral preferences, she has them complete an Emergenetics profile. The profile, she explains, can highlight hardwired and learned strengths, but also biases.

To illustrate this, she likes to share an anecdote about installing a window well with her husband. "I found him standing waist-deep in a hole, explaining a technique for using plastic to prevent flooding. I asked a few questions about the process, which irritated him, which irritated me, so I stomped off."

Unbeknownst to Peereboom, her husband had been quietly spending nights researching the solution. He had only shared his idea as a courtesy — not to solicit feedback. "I understood his solution as a work in progress. He heard my attempt to gather information as a challenge to his credibility. Neither of us was right or wrong; we were just looking at the situation from different perspectives."

In her workshops, Peereboom helps participants transform this sort of unproductive tension into productive tension. "We run some role-playing exercises. I assign different behavioral attributes and have players react to a last-minute reservation change, or assign different thinking attributes and have them design an office space," she offers. "They begin to see how it's possible to arrive at a valid — even preferable — solution through a cognitive process unlike their own."

These exercises cause light bulbs to go off around all manner of interpersonal challenges. "I worked with a member who was annoyed by an employee's inordinate number of small tactical questions. The member came to see that this employee simply had a 'structural' preference: Whereas others on the team saw the big picture first — the cover of the jigsaw puzzle box — he started with the pieces."

Just as leaders should be mindful of cognitive differences in others, they should learn to embrace their individual preferences, even if they don't conform to those of a stereotypical leader. "As an executive, you should identify what types of thinking and behavior energize you. You're in a position to delegate tasks that are personally draining. When you do, you tap into a well of energy."

Peereboom advises Vistage members invoke the "platinum rule": Do unto others as they want done unto them. "If you're looking to make a difference in the world, let people be their best and most brilliant selves — yourself included."



Erin Peereboom receives the 2017 Breakout Speaker of the Year award with Chair Larry Hawks and members of group CE5700.

“

“If you're looking to make a difference in the world, let people be their best and most brilliant selves — yourself included.”

Erin Peereboom  
Vistage speaker



# Preparing for an Unpredictable Future

Vistage UK's economist-in-residence weighs in as Brexit inches closer

With negotiations under way on the UK's departure from the European Union, many Vistage UK members are grappling with unknown scenarios. How will Brexit affect international trade? How might the talent pool change? What will this do to the UK economy?

In this interview, Roger Martin-Fagg, behavioral economist-in-residence for Vistage UK, shares his observations about the current climate in the UK — and what Vistage members are doing to prepare.



## Q. What challenges are small and midsize businesses experiencing as a result of the referendum?

The main issue is labor supply. More people are retiring than joining the labor force. We're also losing a lot of young and skilled European workers. The primary reason is the fall in the value of sterling and the surge in employment in the growing EU economy. The secondary reason is many foreign workers are unsure of their future status when the UK leaves the EU. By the time this happens — which will probably be in December 2020 — I expect Vistage members will find it difficult to attract exactly the right talent they need. However, some members are already substituting labor with automation.

## Q. Can you share an example of a Vistage member who's using technology to address labor issues?

Two days ago, I was with a Vistage member whose business takes sheet metal and welds it into equipment for customers. He's in southeast England. He cannot get the welding employees that he needs, so he's talking to a local university to see if together they can create a welding machine that will do the job he wants done.

## Q. How might Brexit impact companies that rely heavily on imports and exports?

If the British government doesn't manage to do a transitional deal — and we are forced to rely on World Trade Organization rules — then supply chains to and from Europe are going to be subject to delays and bureaucratic checks at customs posts. If that happens, these disruptions might contribute to a recession that lasts a couple of years.

## Q. What are Vistage members doing to prepare for trade disruptions?

Vistage members are not waiting for the government to decide on a hard Brexit or a soft Brexit. They're already making new arrangements so that they're covered. For example, one Vistage member who runs a British business that imports components for cars has 60 percent of his customers in the EU. He is leasing a big distribution center in the Netherlands that allows his product to go straight from Asia — where the product is made — to Europe. Staying in a single market allows for frictionless trade, which means that the product can move freely within the EU without border checks. For me, that is a classic Vistage member response: I've got an issue, and I'm going to find a solution.

## Vistage UK by the Numbers



1,700  
Members



112  
Chairs



29  
Years history



# Celebrating Our Community

Vistage recognizes standout members and Chairs

## 2018 Member Awards

We kicked off our 2018 member awards in three regions across the U.S. Members and Chairs nominated members for exceptional leadership, impact in their first years with Vistage and lifetime achievement. See more winners at [vistage.com/awards](http://vistage.com/awards).

### Philadelphia



#### Vistage Leadership Award

**Tom Spann**  
CEO, Brightside, and Founder, Accolade | Member since 2015

In his first three years with Vistage, Tom Spann handed over the reins at Accolade and helped launch the first employer-based financial health platform, Brightside. He approaches life with the humble mindset of a novice and welcomes the rigor of his Vistage group.



#### Impact Award

**Suchit Bachalli**  
CEO, Unilog Content Solutions | Member since 2016

During his tenure as a Vistage member, Suchit Bachalli has risen to CEO of the global business Unilog and has explored and transacted numerous business growth and expansion activities. He relied heavily on his Vistage group to understand which areas of his business required strengthening and thoughtfully implemented solutions.



#### Lifetime Achievement Award

**Frances Pierce**  
Chairman and CEO, Data Systems Analysts | Member since 1992

After industry turmoil in the '90s resulted in a critical loss of business, Frances Pierce took the lead on adapting service offerings, making tough cuts and implementing an overall migration from software development to IT consulting. Pierce joined Vistage in 1992, and with the help of her Vistage group, she has taken her company from \$9 million to \$180 million in revenue.

### Seattle



#### Vistage Leadership Award

**Jeff Dance**  
CEO, Fresh Consulting | Member since 2013

To prepare for future technological shifts, Jeff Dance recently acquired and successfully integrated a hardware engineering and robotics firm. Thanks to his visionary leadership team, his business has more than doubled since he joined Vistage in 2013 and is on pace to double again in 2018.



#### Impact Award

**Ross Treleven**  
General Manager, Sprague Pest Solutions | Member since 2015

Ross Treleven's dedication to his family's business is reflected in the unprecedented financial and regional growth Sprague has accomplished over the 12 years since he joined the leadership team. From 2017 to 2018, Treleven was a key leader in Sprague's more than 100% growth in profitability and 15% increase in business while leading their regional expansion into California.



#### Lifetime Achievement Award

**Foss Miller**  
CEO, Pacific Research Laboratories | Member since 1989

Before starting his transition away from his ownership role at his company, Foss Miller took steps to ensure his employees' jobs would stay local. He has supported his senior leadership team's development throughout his 30 years with Vistage by encouraging four of his key leaders to participate in Vistage Key Executive groups.

### Colorado



#### Vistage Leadership Award

**James Logan**  
President and CEO, OneRain and High Sierra Electronics | Member since 2007

Over his 11 years as a Vistage member, James Logan has grown his company's value by 40 times and successfully sold his companies to an equity capital group. He is developing his next generation of leaders by placing five of his management team in Vistage groups.



#### Impact Award

**Brad Kopitz**  
CEO, Artifact Uprising | Member since 2017

With support and guidance from his Vistage group, Brad Kopitz executed a successful plan to acquire Artifact Uprising, where he had served as CEO. Today, he has created an intentional culture that supports his vision of creating premium photo prints, books and frames with innovative technology.



#### Lifetime Achievement Award

**Ray Singleton**  
Executive Vice President, Earthstone Energy | Member since 2005

Ray Singleton has become one of the most respected CEOs in the Denver oil and gas community over the course of his Vistage tenure. He took over as CEO of Earthstone when it was near bankruptcy and valued at only \$500,000 and transformed it into a \$40 million NYSE-traded company by 2014.

## Vistage Chair Excellence

The Nourse Chair of the Year and Pat Hyndman Awards are named in honor of Vistage founder Bob Nourse and legendary Chair Pat Hyndman. These awards recognize Chairs for the exceptional value they provide members and their service to the community.

### Nourse Chair of the Year



**Gary Brennglass**  
Chair, Vistage Worldwide, Inc.

Chair Gary Brennglass embodies the Vistage core values of trust, caring, challenge and growth. Though he achieved remarkable success over his 30 years of C-level leadership and as an executive coach, he attends every workshop available to learn more about the art of Chairing. He is generous with his time and energy, leading key partnerships and issue processing sessions for our Los Angeles community.



Gary Brennglass receives the Nourse Award with Vistage COO David Pearson and Regional Executive Craig Stevenson.

### Pat Hyndman Award



**David Zerfoss**  
Master Chair, Vistage Worldwide, Inc.

Master Chair David Zerfoss has gone above and beyond the call of duty in service to the Vistage community and has given unselfish and immeasurable service to the Charlotte business community. He exemplifies what the Hyndman Award is truly about: community, commitment, clarity, alignment and the pursuit of excellence through relentless improvement. Zerfoss is an Executive in Residence at the Queens University, McColl School of Business and has published two books on how to choose less stress in business and life.



David Zerfoss receives the Hyndman Award with Vistage CEO Sam Reese and Regional Executive Jim Walsh.



# Vistage Executive Summits

Expand your perspective. Gain insights. Find inspiration.

## Business optimization

Uncover new opportunities using fresh perspectives from trusted experts.

## Leadership enhancement

Sharpen your focus on the areas of greatest opportunity.

## Lead with innovation

Elevate your creativity and problem-solving skills.

## Take meaningful action

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- ▶ St. Louis

Find your Vistage Executive Summit at [vistage.com/events](http://vistage.com/events).



Speaker Kindra Hall at the 2017 Vistage Executive Summit in San Diego

# VISTAGE

## Better decisions. Better results.



Companies who joined Vistage over the past five years **grew 2.2x** faster than average small and medium-sized U.S. businesses, according to a 2017 analysis.

No one understands the challenges and needs of CEOs and key executives better than Vistage. For more than 60 years, we've been helping business leaders around the world refine their instincts, improve their judgment and expand their perspectives to make better decisions. Better decisions lead to better results, and the results speak for themselves.

To learn more, visit [vistage.com](http://vistage.com).

▲ 12.5%  
Small and medium U.S. businesses

▲ 28%  
Vistage member companies

Average compounded annual growth rate for company revenues (CAGR)

\*Analysis performed on Dun & Bradstreet data for U.S. companies with \$5M to \$1B in annual revenue. CAGR for Vistage member companies (sample size: 788) calculated for companies still active as of April 2017; calculated from year of joining the Chief Executive program (between 2011-2015) through 2016. CAGR for average U.S. small and medium-sized businesses (sample size: 918) based on 2011-2016 revenues.