VISTAGE INSIDE

The Vistage Inside Experience

"One of the challenges of traditional leadership training programs is that there isn't a lot of accountability to apply what you've learned. The key to any learning program is that it has to be applied. If it is not applied, it is lost. Everything about the Vistage Inside program is geared toward applied learning."

Tim Knezevich,
Vice President,
Global Talent
Management, Equifax

Vistage Inside delivers a unique and tailored leadership development solution that aligns teams while developing individuals. The program leverages professionally-facilitated private advisory groups to empower executives to:

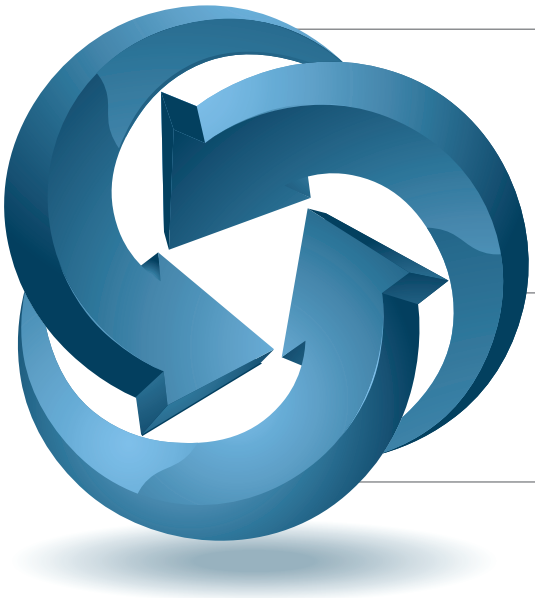
- Gain alignment and inspire collaboration
- Confront challenges and devise solutions
- Acquire the tools to take action and become more effective leaders

Improved Problem Solving: Executives collectively and collaboratively confront challenges and devise solutions that they then commit to making work.

Stronger Alignment and Communication: Break down functional silos through improved communication and better understanding of each others' objectives and challenges.

Enhanced Leadership Skills: Increased exposure to a broad range of disciplines enables your team to gain valuable insights and take decisive action.

Broader Perspective: Transform insights into better decisions, expanded problem solving abilities and enhanced alignment around your company's strategic objectives.



Action

Applied learning and improved communication ensures that actions have feedback loops

Accountability

Improved accountability produces more effective decision-making and proactive leadership

Alignment

Stronger alignment drives strategic execution and improved results

Vistage Inside aligns teams while developing individuals, improving the performance of your organization.

Vistage Inside Program Components

Vistage has developed a proven proprietary process that has been honed over the last half century. The integration of this multilayered alignment process leads to results that last.

Executive Advisory Sessions

Your team will share a common understanding of issues and opportunities, set high bars for achievement and hold one another accountable for results.

1-to-1 Mentoring Sessions

Vistage Chairs, who are former chief executives and business owners, spend personal coaching time with each team member, following up on and reinforcing lessons learned in group and speaker sessions.

Expert Speaker Workshops

Your team will attend interactive workshops hosted by national speakers and experts in their fields. Vistage speakers offer unique content and perspectives to encourage new thinking.

Content and Connectivity

Stay connected between meetings and keep the conversations going with a private online portal. Your team also has access to business resources such as white papers, webinars and podcasts.

For more information, please visit www.vistageinside.com

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Research Study

VISTAGE INSIDE

Measuring the Return on Investment of Executive Development: It's the Mix that Matters

The Human Capital Institute (HCI) recently conducted new research to determine what methods of executive development an organization can implement to achieve the greatest return on investment. Diverging from traditional executive development—development through singular, individual, classroom-based methods—the new "Hybrid" executive development process leverages traditional methods, along with ongoing experiential learning, peer interactivity, and more frequent participation by leaders.

In this report, HCI analyzed the difference between these Traditional Development Organizations (TDOs) and Hybrid Development Organizations (HDOs).* Their research revealed the following significant findings:

- A positive relationship exists between HDOs and key business metrics: Execution, Alignment, Collaboration, Retention, and Succession.
- Organizations that have adopted a hybrid development model are, as a whole, better positioned to achieve business success than organizations that merely rely on traditional methods alone.

Learn how five key business metrics, ***Execution, Alignment, Collaboration, Retention, and Succession,*** are positively influenced by a hybrid approach to executive development.

* HDOs rely on traditional methods in conjunction with frequent use (annually or more often) of four or more nontraditional methods, such as peer advisory, coaching, etc.

To receive a copy of the complete research report, email us at insiders@vistage.com.

HCI

Case Study

VISTAGE INSIDE

Developing High Potential Leaders at EQUIFAX

Equifax has been a global leader in information solutions for more than a century. It leverages one of the largest sources of consumer and commercial data, along with advanced analytics and proprietary technology, to create customized insights for both businesses and consumers. Headquartered in Atlanta, Georgia, Equifax Inc. employs approximately 7,000 people in 18 countries through North America, Latin America, Europe and Asia.

The Challenge: Develop Future Senior Leaders

Equifax has been recognized as an innovative industry leader for years. However, the speed of change in today's information age requires frequent course correcting in order for companies to thrive. Senior executives at Equifax sought to revitalize the company's emphasis on innovation, and they realized the need to align leaders at all levels to a new culture paradigm.

While the company had strong development programs in place for its front-line managers, the senior leadership team wanted to strengthen and engage Equifax's high-potential leaders that would be promoted to the executive suite within the next few years. This strategic succession planning move would help the company prepare for the future and focus on specific goals for increased organic growth and expansion through acquisitions and joint ventures.

"One of the challenges of traditional leadership training programs is that there isn't a lot of accountability to apply what you've learned. The key to any learning program is that it has to be applied. If it is not applied, it is lost. **Everything about the Vistage Inside program is geared toward applied learning."**

Tim Knezevich, Vice President, Global Talent Management, Equifax

"I thought it was a great experience that provided a number of tools to help us grow as leaders and to facilitate trust and camaraderie among the group. As members of the global leadership team at Equifax, we inherently face common challenges across the organization. Vistage Inside gave us a forum to discuss those challenges we all share, and to provide feedback to each other on individual issues."

Hunt Jackson, Executive Director Emerging Markets, Equifax

The Solution: A tailored program that builds trust and strengthens communication

Equifax chose to work with Vistage to configure a global leadership development program that included ongoing peer group meetings, expert speaker workshops and individual executive coaching sessions. Vistage Inside tailored a program specifically for Equifax's high potentials that would build relationships, increase trust, improve communication, and above all maintain an innovative company culture at all levels.

The group tackled the company's most difficult challenges and worked to create a more innovative and collaborative culture with the goal of fostering better execution of strategic priorities. They also began to focus heavily on removing barriers in order to support the next generation of high potentials.

The Results: Greater alignment, collaboration and accountability

Equifax immediately noticed significant improvement in alignment and collaboration. Participants developed stronger, more trusting relationships that resulted in more authentic dialogue. Emerging leaders were more focused on executing against their strategic initiatives, and employees performed at a more disciplined level. The Vistage Inside group members now feel greater accountability to their CEO and each other. By participating and applying the learnings, they have become a sounding board for ideas from the executive suite, and a united voice, creating real innovation at all levels throughout the organization.

See what's possible for your leaders at **VistageInside.com**

"The Vistage Inside members were always working on the most important issues for the company. **Executives were not spending time away from their jobs, but instead were bringing their jobs into each and every session—and walking away having advanced the agenda for their business.** Pair that with the individual coaching sessions with the Chair, and you have a beautiful mix of real applied learning for problems they were facing every day with an opportunity to experiment with some of the tools and theories that the speakers provide "

Tim Knezevich, Vice President,
Global Talent Management, Equifax

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Case Study

VISTAGE INSIDE

Northern Trust

Northern Trust is a publicly traded banking and financial services company with more than 14,000 partners worldwide. As a company with a rich heritage, Northern Trust has continued to evolve with the changing needs of its customers by providing innovative investment management, asset and fund administration, and other banking solutions for more than 124 years.

Challenge

Northern Trust has long been regarded as an industry leader for their innovative approach to leadership development, and their long-term thinking has served them well while working through the financial downturn over the past several years. In the late 2000s, Northern Trust's Wealth Management Central Region engineered a major client service model reorganization, and its managers in the region were now having to lead broad teams outside of their own personal disciplines. In addition to a new organizational structure, the company was dealing with a challenging economic outlook – particularly for the financial services industry.

Solution

Recognizing the need to equip their managing directors with the skills required for success, Darrell Jackson, Regional President of Personal Financial Services, called on Vistage to implement a collaborative leadership development program that would help build stronger teams, increase engagement, and align leaders to the core business strategy.

Already a Vistage Chief Executive member, Darrell understood the myriad benefits of bringing the Vistage Inside program into his organization – and how those benefits would cascade further into the company as the managing directors became better leaders. Now four years into the program, Northern Trust Illinois co-presidents Darrell Jackson and Ron Mallicoat maintain their sponsorship of the program as they continue to see incredible returns on their investment.

"I found my voice in Vistage."

Linda Nolan
Managing Director, Wealth Management

"I consider myself a Vistage poster child. I learn and apply something every meeting I attend. You have coached me, pushed me, challenged me and made me reflect – and that's worth a lot to me. I truly believe my Vistage experience greatly contributed to me being ready for my new position."

David Williams
Director of Sales, Wealth Management

Results:

Confident Leaders

Within the first year following the implementation of the Vistage Inside program, Northern Trust began to see immediate and lasting benefits from their efforts. Senior leaders recognized a new level of confidence among the group members, and observed the executives putting into action on a daily basis the skills learned in the program. Further, they watched members challenge and raise the level of performance of their own teams.

Stronger Relationships

Almost immediately, Darrell and other senior leaders noticed stronger relationships among the managing directors. The peer-to-peer learning that took place helped the group build stronger social ties, increased trust, and created a foundation for continued collaboration as these leaders move through the organization. When asked, members cited improvements in their interpersonal skills, and noted their success with deliberately creating a better corporate culture by using the tools learned in Vistage Inside.

Active Engagement

Among those in the Vistage group, Northern Trust recognized a palpable change in the directness, candor, and focus on accountability. Members felt confident in approaching senior management with new ideas, and worked more closely with the executive suite to address challenges head-on.

Better Communication

When asked, 100% of Northern Trust's Vistage Inside members credited the program for their improved communication and for establishing a common language among the team. Many cited the expert speaker workshops as having helped them improve their executive presence, communication and presentation skills.

Personal and Professional Growth

Nearly half of those who participated in the Vistage Inside program at Northern Trust have earned a promotion, and at least five members were promoted more than one level above their existing responsibilities. When surveyed, members felt that they were performing at a higher level, and that Vistage helped contribute to stronger revenue growth, employee and customer retention, and team performance.

Business Results

Vistage Inside has helped create a more aligned, collaborative, and cohesive leadership team, which has also translated to the bottom line. In the years since the launch of the Vistage Inside program, the Central Region has outperformed its counterparts in several key financial measures, including revenue growth, pre-tax profit and net income.

"In the long-term, the Vistage Inside program will give us a real competitive advantage because we will have leaders who are more accountable, make better decisions, and have a much more global perspective."

Ron Mallicoat
Co-President, Wealth Management, Northern Trust Illinois

"Following one of the worst economic downturns in recent memory, Wealth Management Illinois improved in nearly every financial metric...I feel very confident in saying that the increased collaboration and communication, as well as the broadened perspectives our leadership team gained from the Vistage Inside program, has helped us to not only weather this economic storm better than our competitors – but also to make great strides towards a successful future."

Darrell Jackson
Co-President, Wealth Management, Northern Trust Illinois

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Case Study

VISTAGE INSIDE

Riverside HealthCare

The Challenge

Riverside HealthCare was spending an estimated $100,000 a year on personal development training that was not being fully utilized by team members, so they called on Vistage Inside to develop a more robust leadership program. Overall, they were looking for stronger alignment and strategic thinking on a broader scale.

At their director level they were seeking that next step that would turn technical managers into exceptional leaders, and on a senior management level they needed to enhance team building to integrate new VPs and prevent complacency.

The Solution

What initially started as a single Vistage Inside group for its senior leadership team grew into two separate groups—one tailored to the senior leadership team and the other to the director leadership team—where individuals could push each other to the next level as a team by speaking their truths, productively confronting issues and constructively working with each other's strengths and weaknesses. Vistage Inside was able to provide a common experience, language and themes to bring the senior management and director teams into greater alignment—focused on the metrics that matter most to the business.

"The Vistage Inside program has worked extremely well for us. I would recommend this program to any other company that employs people to work on teams and relies upon their success—it's an excellent program for team building."

Phillip M. Kambic
President and CEO
Riverside HealthCare

The Results

- Directors and the senior management team are working together more effectively, with **greater engagement and awareness** of strategic organizational direction.
- Team members are **able to shed detrimental and counter-productive behaviors**, overcome daily barriers to team building and collectively tackle issues more efficiently.
- What started out as a **one-year agreement is now into its fourth year.**
- The president and CEO has developed, based on elements of the Inside program, a separate "Young Professionals Group" to help **develop up-and-coming leaders within the organization.**

To learn more about our executive development offerings, go to **vistage.com/inside**

"The Vistage Inside program has changed our perspective, encouraging us to think broader and stay curious."

Rebecca K. Hinrichs
VP of Human Resources
Riverside HealthCare

"The Vistage Inside program provides members with a unique internal experience that they can't get elsewhere —providing world-class speakers and a sustainable framework to build trust and confront the obstacles that get in the way of corporate and personal success."

Bob Berk
Vistage Chair

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Getting the Most Out of Leadership Development: Interview with AmeriFleet President & CEO

John Norris, the President and CEO of AmeriFleet Transportation, Inc., was interviewed regarding the performance of the Vistage Inside program within his organization. What follows are some condensed highlights from the interview, which took place approximately six months into the launch of their Vistage Inside program.

How did the Vistage Inside program get its start at AmeriFleet?

I have been involved with Vistage since 2005. During this time I have found it to be a great resource in terms of growth, innovation and new concepts, as well as ideas relative to leadership and management. So, when I heard about Vistage Inside, I presented it to the senior leadership group.

They agreed it could be an important foundational program to develop and enhance the current leadership team. We like the fact that it provides a mix of outside consultants and speakers who share new fresh ideas and new perspectives on things that we may not see ourselves. And we also like the fact that we work in a group environment, working as a team.

What were your initial objectives for the Vistage Inside program?

The initial focus for the inaugural year of the Vistage Inside program was two-fold. As a business, we had reached the point where we'd had great growth and success. This year was the launch of a new and even

"We wanted to support the growth efforts of the business with the current senior leadership, as well as individuals we'd identified as the **next generation of senior leaders.**"

John Norris,
President and CEO
AmeriFleet

Question continued on next page...

more aggressive growth strategy for AmeriFleet. However, we could foresee changes in our current marketplace developing: completely new markets to penetrate and aggressive growth targets for sales management to achieve. So, we wanted to support the growth efforts of the business with the current senior leadership, as well as individuals we'd identified as the next generation of senior leaders. The purpose is to enhance the capabilities of the folks leading the business today and build the skills of those who will lead it tomorrow.

The business was very much in the process of optimization and constantly improving processes and not as focused on new markets and new growth opportunities. Therefore, it was a reorientation of this mindset that we wanted to support with Vistage Inside.

Aligned with that was an organizational accountability effort. The changes we hope to see at the end of the year cycle are:

1. To see and feel a mindset that is more on the growth orientation side of the spectrum versus the optimization side.

2. To see and feel a different level of accountability throughout the organization.

These will be the benchmarks for Vistage Inside regarding what we accomplish and how we measure our progress.

What has your experience with the Vistage Inside program been like so far?

Feedback from the team has been excellent. The feedback I've received from [Chair] Linda Gabbard is that she's encouraged with the openness of the dialogue. The feedback from the one-to-ones is that folks appreciate the opportunity to have a different outlet for sharing ideas and opinions, to get feedback and present issues.

There was a bit of a concern that the sharing of issues, concerns, and things that need to be worked on might be inhibited, however this has not turned out to be the case.

That's the result of expert facilitation as well as the fact we treat each other as peers. I think that to make Vistage Inside valuable, that has to be a key aspect of the culture of the business and the management style that already exists.

Has the Vistage Inside experience changed how the group participants do business or operate within your organization?

There hasn't been one speaker or one program that we've done where we didn't implement some component of what we learned. People now have new terminology and a language to interact with each other.

"There hasn't been one speaker or one program that we've done where we didn't implement some component of what we learned."

John Norris,
President and CEO
AmeriFleet

Question continued on next page...

> "There is more alignment and enhanced dialogue between leaders, managers and subordinates."

John Norris,
President and CEO
AmeriFleet

Everyone has implemented some of the basic tactics and tools they received from Edgar Papke's culture presentation and Mike Scott's accountability tactics. We've implemented much of what we've heard at both those sessions.

Have you felt any shift in the relationships between your executive team and their direct reports as a result of Vistage Inside?

We have seen traction in our communications. We have the senior leadership team in the room plus one to three of their direct reports. I think at that level, they've been able to open up additional dialogue and have new approaches to how they communicate. They've begun to feel the benefit of Vistage Inside at that level.

What results have you experienced with regard to the one-to-ones?

The group is getting significant benefit from the one-to-ones. They provide a chance to explore things with an outside resource who might have a different perspective. That has been very positive.

We overcame any inhibitions early in the first session; from there on out, it's been great, with free, open dialogue and interaction. The interactions are different than our normal interactions in the day-to-day business and that's a good thing.

Another reason I see the group meetings being particularly beneficial is the message it sends to the team:

1. It sends a message to the current senior leadership team that this is your business. This is your responsibility. It reinforces the importance of their roles and the importance of their leadership in the business.

2. It also sends a message to the next generation of future leaders that are in this as well. It reinforces the commitment that AmeriFleet is making to grow their skills and grow their capability to take their business forward in the future.

Do you feel that the Vistage Inside program is meeting your intended objectives for AmeriFleet?

Absolutely. There is more alignment and enhanced dialogue between leaders, managers and subordinates. As a result, there's improved understanding of what we are today and what we're trying to accomplish as a business. All those things are very positive. Although I can't say that they're quantifiable at this point, I can say we've had a record first half in 2011. I think there's a correlation.

What are some benchmarks that you are tracking with regard to the Vistage Inside program?

We did an initial assessment regarding cultural alignment, so we can now go back and benchmark where we were

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before in terms of cultural alignment and where we want to be. In coordination with this assessment we'll continue to conduct customer, client and employee satisfaction surveys and compare the before and after results.

We'll track performance against our strategic objectives, defined in terms of new business opportunities:

- Did we hit our interim objectives?
- Did we achieve the target growth?
- Did we penetrate the market as expected, etc.?

What is the key difference between the Vistage Inside program and other leadership development programs?

Succinctly, I would say you can tailor it to the business. It allows us to constantly tailor and drive Vistage Inside in a very customized track specific to the individuals and the culture we have in the business, as opposed to a more generic mass market leadership development program. That's a key difference. We get to drive it, tailor it, and customize it based on what the needs and the feedback are.

It's an iterative process as opposed to other programs which are basically "buy it off the shelf and have it implemented."

What distinctions can you draw between the Vistage Inside group and the Vistage CEO group that you are part of?

When I attend my Vistage CEO group I'm hearing the perspectives of other businesses and I think it gives me a different paradigm. Quite frankly, I get a broader and different perspective from the CEO group because everybody I'm with, in the Inside group, has an AmeriFleet paradigm, whereas in the CEO group no one has an AmeriFleet paradigm other than me. I think part of that's the receiver. Part of it is the giver. That's the biggest difference in terms of my experience between the two. They're both valuable.

"I'd say it's beyond training. It's true leadership development."

John Norris,
President and CEO
AmeriFleet

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What advice would you share with other CEOs that are considering starting a Vistage Inside group?

I'd say it's beyond training. It's true leadership development. Focusing your leadership development efforts and resources on Vistage Inside, as opposed to fragmented approaches you might be taking, will provide much more leverage off that investment than you could get with another approach.

What we did is take a step back and say, "Okay, what are we spending where? And is that really being effective? Maybe we want to cut back or eliminate some of the components here and use Vistage."

Vistage Inside provided the opportunity to customize, tailor, and focus our resources in Inside and use that as the vehicle to funnel all our leadership training through to the entire organization. At that point, it becomes almost a no-brainer because you're, in essence, having an opportunity to develop your own customized leadership development program, with the support of Vistage, a Vistage Chair, and access to all the Vistage resources, including speakers.

So, in very short order, you can pull something together that's unique to you and that is going to provide the most leverage. This is also offset by not spending that money in a fragmented fashion elsewhere. That works for us!

Learn more. Visit us at www.vistage.com/inside today.

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