# Vistage Advancing Leader Program
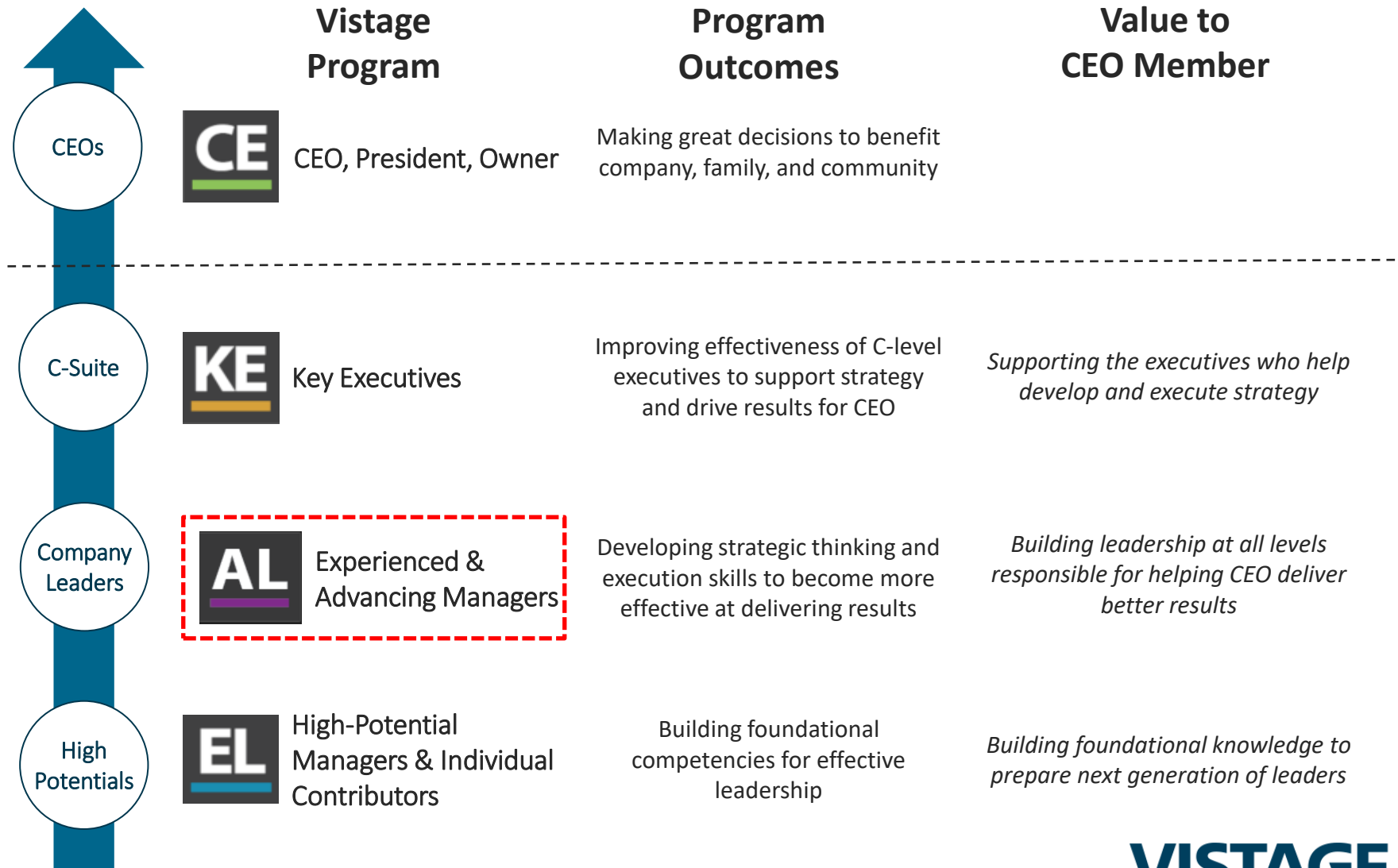
Carol Steinberg

Master Chair

PHL Group Launch – March 2021

# Vistage extension products make CEOs more effective by developing the leaders they depend upon

| | Vistage Program | Program Outcomes | Value to CEO Member |
|---|---|---|---|
| **CEOs** | **CE** CEO, President, Owner | Making great decisions to benefit company, family, and community | |
| **C-Suite** | **KE** Key Executives | Improving effectiveness of C-level executives to support strategy and drive results for CEO | *Supporting the executives who help develop and execute strategy* |
| **Company Leaders** | **AL** Experienced & Advancing Managers | Developing strategic thinking and execution skills to become more effective at delivering results | *Building leadership at all levels responsible for helping CEO deliver better results* |
| **High Potentials** | **EL** High-Potential Managers & Individual Contributors | Building foundational competencies for effective leadership | *Building foundational knowledge to prepare next generation of leaders* |

**VISTAGE**

**AL**

**Advancing Leader**

## Advancing Leader members will…

### Learn through Vistage's Effective Leadership Methodology.

Members develop strategic thinking, communication and collaboration to become more effective leaders and get better results using strategies and tools rooted in Vistage's 60+ years of working with leaders.

### Apply learnings to real business projects and initiatives.

Members gain clarity and leverage peer feedback on existing initiatives, challenges and opportunities using Adapted Issue Processing in order to effectively produce tangible results for their organization.

### Broaden cross-functional perspective and expertise.

By working within a peer group representing various roles and functions, members gain new perspectives and learn to collaborate more effectively for greater organizational impact.

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# Vistage for Advancing Leaders

The **Vistage Advancing Leader Program** is designed to accelerate their leadership development journey of experienced and advancing managers. The program challenges members to become more effective leaders through proactive thinking, communication and collaboration to achieve breakthrough results.

**Who is an Advancing Leader?**

✓ Experienced and advancing managers within a small to mid sized organization

✓ Typically reports to a member of the executive leadership team

✓ Responsible for delivering business results

✓ May or may not directly manage employees

| Leadership Role | Vistage Program |
|---|---|
| CEOs, Presidents and Founders | Chief Executive |
| C-level Executives | Key Executive |
| **Experienced and Advancing Managers** | **Advancing Leader** |
| Managers and Individual Contributors | Emerging Leader |

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# Program Configuration

Advancing Leader is a high-impact, evergreen program for **Experienced & Advancing Managers** designed to accelerate their leadership-development journey.  Completion of Emerging Leader is **NOT** a requirement for Advancing Leadership Program.

| Advancing Leader Program | |
|---|---|
| Target Members | Experienced & Advancing Managers  (Vistage affiliation is not required for enrollment – unsponsored rate of $535/mth will apply) |
| Duration | Ongoing, evergreen program |
| Meeting Frequency | 6 full-day meetings per year, held every other month.  Professionally facilitated by Vistage Chair |
| Speakers | 6 Expert Speaker Workshops (AM session) during every group meeting |
| Group Size | Maximum of 30. Multiple members per company encouraged. |
| Venue | Meeting facility in KoP or Plymouth Mtg area.  Facility & catering provided & managed by  Vistage Chair |
| Online community | 24/7 access to 23,000+ members across 21 countries |
| Pricing | $500/month sponsored, ($535/mth unsponsored).  3% discount if annual payment and 1.5% discount if semi-annual payment. |
| Payment Terms | Monthly, Quarterly, Semi-annual, or Annual payments (same as core programs) |
| Cancellation Policy | 90-day cancellation policy (same as core programs) |

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# Advancing Leader's Effective Leadership Methodology

Advancing Leader focuses on developing Effective Leaders. To be effective, leaders must think strategically, communicate clearly and collaborate successfully.



**Effective Thinking:** Involves thinking strategically beyond one's own subject matter expertise, understanding relevant facts and evaluating options.



**Effective Communication:** Involves fostering understanding, support and motivation with stakeholders.



**Effective Collaboration:** Involves seeking perspectives, achieving buy-in, adoption and participation.

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# Advancing Leader Pre-Work Guide

## AL Advancing Leader

_____
Name

### Issue Processing: Pre-Work Guide

This exercise is designed to help you identify potential initiatives, challenges or opportunities so that you can come to your Vistage meeting prepared for impactful Issue Processing.

**Step 1: Identify existing initiatives, challenges or opportunities in your current role or organization that you want to process.** Then, on a scale of 1-5, rate each to determine the most important issue to bring to your group.

- **Initiatives:** _Rolling out of a new product, updating training program, defining a policy, etc._
- **Challenges:** _Managing up, low adoption on an existing process, etc._
- **Opportunities:** _Increase sales YOY, build out a new team, etc._

| Initiatives Challenges & Opportunities | Urgency (1-5) | Company Impact (1-5) | Need for feedback (1-5) | Priority (1-5) |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Based on the assessment above, the issue I will process is:

_____

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**Step 2: Outline your issue for processing.**
Prepare the following statements to bring to your group.

1. **How do I...?** _(Turn your project/challenge/opportunity into an actionable question)_

_____

2. **The Issue is important because...**

_____

3. **What I have done to date is...**

_____

4. **What I want the group to help me with is...**

_____

**Step 3: Determine the area of focus that will be most helpful in advancing this issue and delivering better results.**

☐ **Mindset:** Thinking strategically beyond your own expertise, understanding relevant facts, evaluating options to deliver better results.

☐ **Communication:** Fostering understanding, support, and motivation with stakeholders to deliver better results.

☐ **Collaboration:** Seeking perspectives, achieving buy-in and participation in delivering results.

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**Step 4: Determine the stage.** Where is your issue in its current state?

☐ **Stage 1: Define | Determine the desired parameters and outcome.**
This stage includes clarifying the scope, assessing who needs to be involved and the resources required and defining what success looks like.

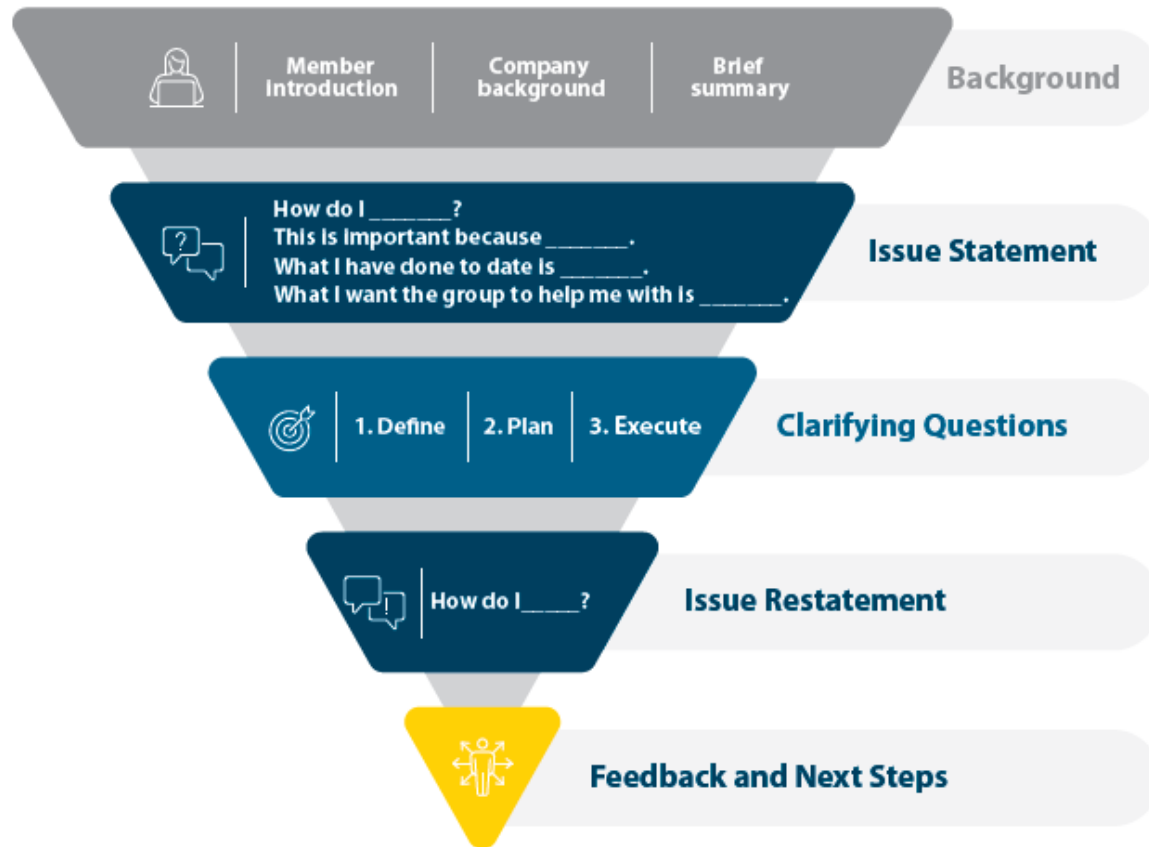☐ **Stage 2: Plan | Create a roadmap to reach the outcome.**
This stage includes determining tangible milestones, establishing a communication structure and cadence between stakeholders and setting KPIs.

☐ **Stage 3: Execute | Implement the plan and make adjustments.**
This stage includes problem solving, leading through change management, ensuring all stakeholders are accountable and delivering results.

# Adapted Issue Processing

Identify an existing issue, challenge or opportunity.
Use the framework to gain clarity and feedback needed to move forward.



**Background**
Member Introduction | Company background | Brief summary

**Issue Statement**
How do I _____?
This is important because _____.
What I have done to date is _____.
What I want the group to help me with is _____.

**Clarifying Questions**
1. Define | 2. Plan | 3. Execute

**Issue Restatement**
How do I _____?

**Feedback and Next Steps**

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# Adapted Issue Processing

Identify an existing issue, challenge or opportunity.
Use the framework to gain clarity and feedback needed to move forward.

## 1. Background

**Member introduction**
Name, role

**Company background**
Industry, company high-level objective(s)

**Brief Summary**
- Issue overview: context, objectives, stage
- Leadership focus: mindset, communication or collaboration

## 2. Issue Processing

How do I _____?
This issue is important because _____.
What I have done to date is _____.
What I want the group to help me with is _____.

Clarifying questions

Issue restatement nominations

How do I _____?

## 3. Feedback + Next Steps

**Constructive feedback:**
- Leadership focus: mindset, communication or collaboration
- Additional strategic thinking needed
- Clarification needed
- Alternatives, options or considerations
- Limiting beliefs/ constraints
- Suggestions for next steps

**Next steps**

### Clarifying Prompts:

**Stage 1: Define**
**Determine the desired scope and outcome.**

- What info do you have to-date?
- What info needs to be shared?
- Who needs to be involved?
- Who is impacted?

**Stage 2: Plan**
**Create a roadmap to reach the outcome.**

- What actions drive results?
- Who owns each area?
- What are the key milestones?
- How are updates communicated?
- How is input/feedback shared?

**Stage 3: Execute**
**Implement the plan and adjust.**

- What obstacles have surfaced?
- How are changes/ updates shared?
- How do stakeholders remain accountable?
- What is the impact of missed milestones?
- How do you assess results?

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# Expert Speaker Workshops

- The Advancing Leader Program will include **expert Vistage speakers** on business-related topics that support Effective Leadership.

- Chairs will bring in speakers that meet the group's needs, selecting speakers from a wide array of topics within the **Vistage Decision Model**.



## Vistage Decision Model Speaker Topics

1. Leadership
2. Talent Management
3. Customer Engagement
4. Financials
5. Business Operations
6. Personal Development

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# Cross Departmental Collaboration

As part of the program, members will concentrate during the meeting off-months to build relationships with cross-departmental peers and colleagues within their organization for enhanced buy-in on shared initiatives.

**Outcome:** To guide leaders to work together to create better alignment, move faster and achieve results in support of the CEO sponsor's success.

Members will receive a **Cross-Departmental Collaboration Manual** and a **Conversation Guide** that includes:

✓ Strategies and best practices for building internal relationships
✓ How to approach your peers
✓ Giving and receiving constructive feedback
✓ Tips for running an effective meeting
✓ Conversation guides

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# Effective Leadership Evaluations

Advancing Leaders will take a **Leadership Evaluation** to measure their growth and leadership effectiveness in the areas of:

- Effective Mindset
- Effective Communication
- Effective Collaboration

These self-assessments will be taken at the onset of the program and again at the end of each subsequent year, or can be administered based on an advancing leader's:

- work (ie: after a project)
- responsibility (ie: promotion)
- duration (ie: professional development)

The Member, Chair and Sponsor will all receive a copy of the results.

Sponsors can use these evaluations to benchmark and track progress, prioritize development and identify areas of focus for the next year.

**AL**
**Advancing Leader**

**VISTAGE**

# Sponsoring CEO/ Executive Relationship

The sponsor (or designated executive) plays a supporting role the member's development and their contribution to executing the company's business strategy and plan.

Additionally, a sponsor can further the member's growth by:

- **Tying leadership development to real-world business execution:** Members identify real-world initiatives and gain buy-in to align with business objectives. Members apply program learnings directly to their organization for low-risk development, high ROI and tangible impact.

- **Evaluations and check-ins**: Sponsors are encouraged to connect with advancing leaders bi-annually to review the program impact, analyze their leadership evaluation(s) and provide recognition.

- **Connecting with the Chair**: Sponsors can expect to touch base with Chairs annually to share progress on results that drive effectiveness.

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# Positioning Advancing Leader with Vistage offerings.

# Emerging Leaders can continue their journey with Advancing Leader to become more Effective Leaders

**AL** Advancing Leader

(Note: completion of EL is NOT a requirement for AL)

**Emerging Leader helps** leaders go from reactive to active by developing their core leadership competencies. **Advancing Leader** develops experienced and advancing managers into Effective Leaders.

Core elements of Effective Leadership:
1. Leaders become effective through strategic **thinking, communication and collaboration**
2. Leaders become effective through **application-based learning**
3. Becoming effective allows them to **drive better and faster results** on the initiatives they lead
4. Effective leaders help lead the organization to **think more cross-functionally and strategically**

| EL Emerging Leader | AL Advancing Leader | KE Key Executive |
|---|---|---|
| Understanding and succeeding in one's function, partaking in change initiatives, and continuously supporting customers and team members. | Delivering better results by thinking strategically beyond one's function, collaborating with stakeholders, and effectively communicating. | Contributing to the CEO's overall strategic thinking and leading organizational execution of critical initiatives. |

# How is Advancing Leader different from **Emerging Leader**?

## Advancing Leader…

**Targets company leaders who operate at the next leadership level.** Building upon the foundational leadership development of Emerging Leader, Advancing Leader provides a critical next step for developing experienced managers into effective leaders.

**Is evergreen and ongoing.** Advancing Leader has no set curriculum or end date. Members have an opportunity to continue their growth and development journey with Vistage and new members can join at any time.

**Is rooted in application-based learning.** Advancing leaders bring existing initiatives or challenges to the group to process, allowing members to directly apply key learnings and gather peer feedback for greater organizational impact.

**Introduces Adapted Issue Processing.** Building upon group work and breakouts featured in Emerging Leader, Advancing Leader approaches leadership development using true peer advisory and Adapted Issue Processing to drive real-world results.

**Offers a variety of speakers and topics to best meet member needs.** Guided by the Vistage Decision Model, Advancing Leader features a wide range of speakers and topics to help deliver the most timely, relevant and applicable content to senior managers.

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# How is Advancing Leader different from Key Executive?



## Advancing Leader...

**Provides continued development for leaders operating between Emerging Leader and the c-suite.** Using Vistage's proven leadership methodology, Advancing Leader equips senior managers with the tools and knowledge to successfully execute in their current role and prepares them for executive leadership roles in their organization.

**Utilizes Adapted Issue Processing:** Advancing Leader incorporates true peer advisory through a lens of effective execution — with additional prompts and "guard rails" to guide discussions. Advancing Leader members will be well-prepared to transition to a more traditional Issue Processing within a Key Executive group, creating seamless continuity between programs.

**Meets bi-monthly.** Advancing Leader meets for a full day every other month (6 meetings per year). Members spend fewer days away from the office and focus on improving cross-departmental collaboration with peers and colleagues during off-months.

**Includes a speaker workshop every meeting to broaden expertise.** Every Advancing Leader meeting incorporates a Vistage speaker workshop focused on relevant business topics. Because of this cadence, Advancing Leaders are exposed to top-rated thought leadership each meeting resulting in accelerated application and proficiency.

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# Advancing Leader Compared to other Programs

| | CE | KE | AL | EL |
|---|---|---|---|---|
| **1. Coaching / Mentorship** | | | | |
| - One-to-one Coaching (Chair) | ✓ | Optional | - | - |
| - Mentorship Guide (Internal) | - | - | ✓ | ✓ |
| **2. Group Meeting** | | | | |
| - Speaker Workshop / Content | ✓ | ✓ | ✓ | ✓ |
| - Inclusion Exercise | ✓ | ✓ | ✓ | Chair Workshop |
| - Check-ins (Individual Updates) | ✓ | ✓ | - | - |
| - Host Presentation | ✓ | ✓ | - | - |
| - Addressing Individual Opportunities | Issue Processing | Issue Processing | Adapted Issue Processing | - |
| - Personal Action Summary | ✓ | ✓ | ✓ | ✓ |
| **3. Community** | | | | |
| - Events | ✓ | ✓ | ✓ | ✓ |
| - Networks | ✓ | ✓ | ✓ | ✓ |
| - MyVistage | ✓ | ✓ | ✓ | ✓ |
| **4. Other** | | | | |
| - VDM Assessment (Speaker Topics) | ✓ | ✓ | ✓ | - |
| - Proactive Collaboration Guide | - | - | ✓ | - |
| - Proactive Leadership Assessment | - | - | ✓ | - |
| **5. Program Duration** | Perpetual | Perpetual | Perpetual | 2 Years |

# Why Advancing Leader?

## Benefits to me/ my organization

- **Better bench strength:** Prepares senior managers for key leadership positions within the organization.

- **Improved execution:** Develops effective leaders who demonstrate cross-functional leadership and drive results.

- **Greater retention:** Fosters a learning culture and ownership mentality in key talent for long-term investment.

- **Trusted source:** Delivers continuous, high-impact leadership development from a trusted source.

## Benefits to the advancing leader

- **Ongoing applied learning and development:** Delivers tangible results by continuously applying learnings directly to real-world initiatives.

- **Enhanced relationship building skills:** Cultivates professional relationships and collaboration with colleagues across various departments and levels.

- **Opportunity for recognition and career advancement:** Promotes development in preparation for taking on greater leadership roles within the organization.

**VISTAGE**

# Next steps: How do I enroll my employees?



**Advancing Leader**

If you are considering Advancing Leader as a development program for one or more of your senior leaders:

1. Discuss program details and goals with Carol Steinberg, Philadelphia based Advancing Leader Chair.

2. Identify leader(s) in your organization that would be a good fit.

3. Talk to the member about the opportunity to ensure buy-in.

4. Complete the online enrollment application (Carol Steinberg can provide link)

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Master Chair /2020 & 2019 Vistage STAR award / 2020, 2019 & 2018 Chair Excellence award
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