

# Vistage New Member Orientation

Congratulations on joining our high performing, award winning group. You now have a group of new friends here who are dedicated to your success and all they ask in return is for you to be there for them when they need help, support, or guidance.

**Vistage Values:** Vistage: Caring Trust, Challenge and Growth

**Vistage Mission:** To improve the effectiveness and enhance the lives of CEOs and business owners of small and mid-sized companies

## Typical month schedule:

- A recurring 90 minute 121
- All day meeting: Two types—Speaker and All-Day Executive Session
- Additionally, we have an Annual Retreat with significant others (this year in May/June) and All-City Executive Summit Event in October.
- Speakers will seem like drinking from fire hose. Part of your success that comes from Vistage will be determined by being able to access the right speaker at the right time.

**121 Agenda:** 121 Agenda This is your time and it is your agenda so prepare written agenda. Some months we do triads (3) or dyads (2)

## Our Operating Agreements

1. **Be Present (Physically and Mentally).** Show up 90%, on time; stay for the whole meeting. Block your calendar. Be here for your peers. If you need to be absent, notify the group and send your update by email. Be mentally present—Cell phones off.
2. **This is a place of Trust, Safety and Confidentiality.** This is a safe harbor to bring feelings and issues you can't bring up anywhere else.
3. **Check Ego and Be Vulnerable.** You don't have to have the answers. The more you share the more you will receive.
4. **Challenge the Status Quo.** We seek new and innovative answers.
5. **Be Carefrontational.** Care enough to confront and support each other. You may not always like or agree with the feedback, but remember it is given in the spirit of caring and support.

6. **Integrate Ideas/Suggestions and Report Back.** Try what you learn, share your experiences with the group.
7. **Accountability.** We are accountable to each other. We hold both ourselves accountable and the other members. We report to the group.
8. **Invest in the Group.** Help to grow the group and keep it strong by nominating potential members.
9. **Invest in Each Other.** Commit to your peers: Be here for them. Invest your time, knowledge and experience in your fellow members. What you give you will get twice back. Be ready to help a members in need. We are each other's insurance policy.
10. **Have Fun!!!** This is a place to develop friendships with peers that we can relate to. Enjoy the moment and the experience.

**Our Group Goals:** Financial Independence, Professional and Personal Growth, and Putting Balance Back In Your Life

**Sign In Sheet** - Every Meeting. Check in with personal, health and professional status (1-10 scale), your priority issue. We keep track of accountabilities to report back.

**Issue Processing:** The problem named is the problem solved.

- Issue Processing Form - Be prepared. Use the group's time wisely.
- Iceberg - How deep do you want to go. (90% is below the surface)
- Issue Processing Process - Challenge network. The value is in the questions not the answers.
- Personal Action Summary - Make Action Commitments. Follow through and report back to the group. The group is your accountability network. Don't waste their time by inaction.

“ Vistage is the place you go to get your answers questioned.”

**Goal Setting:** Improving Net Profit, and Personal & Professional Growth requires written goals monitored on a quarterly basis, occasionally adjusted. We use a simple two page business plan used by the Entrepreneurial Operating System (EOS) called the Vision Traction Organizer (V/TO). It contains the

answers to eight essential questions that every business must answer. We review this annually and get updates at quarterly intervals. You should include this in your host presentation.

I'm here to help you get an A and to provide you tools to help your team members get an A and create a team of All A players.

**New Member Connection:** Connect with another member as soon as possible. I will assign you to a member. Meet with different members each month. The goal is to get to know each of the other members on a personal basis at least once.

**Roster** - Available in "My Vistage." Ensure your "My Vistage" profile is updated.

### **Communication:**

1. By E-mail for meeting notices, updates, confirmations, and recaps.
2. "My Vistage" for meeting notices, speaker informations, calendar.
3. Informal What's App Group.

### **On-boarding process takes six months:**

- 1<sup>st</sup> month-Introduction self, business, family, hobbies (Talk a person)
- 2<sup>nd</sup> month-Complete 2-page Business Plan
- 3<sup>rd</sup> month- Bring a topic for "issue processing"
- 4<sup>th</sup> month- Host the meeting (as dates are available)
- 5<sup>th</sup> month-Present Support Team: Lawyer, Accounting, Banker, etc.
- 6<sup>th</sup> month-Make a referral or nomination for this group or another.

**Vistage Client Services Rep.:** Mark Moll @ (858) 509-5863 call for a Tour of Website, (Vistage Networks, leadership library, 1 page resources), billing and any other administrative Vistage issues

**Healthnet - 866-968-2467** Access to medical specialists at leading health providers. Included as a member benefit.

### **Annual Calendar:**

- January: Annual Business Plan Review (Goals)
- February: Annual Financial Report Review
- March:
- April: Annual & Quarterly goal check-in.
- May: Retreat
- June:
- July: Annual & Quarterly goal check-in.
- August:
- September
- October: Annual & Quarterly goal check-in.
- November:
- December: Meet 2nd week of the month.

## **Collins' "Culture of Discipline" as a Guiding Principle:**

- **Disciplined people:** means getting the right people and keeping them focused on excellence.
- **Disciplined thought:** means being honest about the facts and avoid getting sidetracked.
- **Disciplined action:** means understanding what is important to achieve and what isn't.

Result is becoming a better leader, making better decisions for you, your company, and your community.

## **Suggested Reading:**

- Traction: Get a Grip on Your Business by Gino Wickman
- Fierce Conversations by Susan Scott
- The Five Dysfunctions of Team by Patrick Lencioni
- Good to Great by Jim Collins
- How to Know a Person: The Art of Seeing Others Deeply and Being Deeply Seen by David Brooks
- You Are Not the Person I Hired!: A CEO's Survival Guide to Hiring Top Talent by Janet Boydell, Barry Deutsch, and Brad Remillard
- The Power of Peers: How the Company You Keep Drives Leadership, Growth, and Success by Leon Shapiro and Leo Botany
- The Great Game of Business: The Only Sensible Way to Run a Business by Jack Stack

## **Any questions?**

- What are Your Top 3 questions?
- How were revenues this month? +/- Target #'s
- What's keeping you up right now?
- What is your ideal job?
- Let's pick 3 issues to focus on:
- What do you want to bring to the group?
- Who do you want to bring to the group?