

VISTAGE

Perspectives®

Issue 8 | Fall 2021



Blazing Your Own *Path*

Meet 5 Vistage members who bet
on their passions and turned their
dreams into reality

pg 12

Make employee
development your new
competitive advantage

pg 8

Peter Schwartz:
A Chair for
members and
peers alike

pg 24

first to do so
who make

For Jimmy Fallon, the host of *The Tonight Show*, nothing is ordinary about his homes in New York (pictured here). When he needed one-of-a-kind design and custom fabrication, he reached out to Vistage member Michael Bednark.

Fallon's Manhattan home features three floors of custom fabricated décor: a full English-style bar room, a tree-wrapped turret, and several hidden nooks, rooms and passages. Fallon's barn in the Hamptons — where he's shot recent episodes of *The Tonight Show* — houses a 30-foot-tall cedar tree that forms railings for stairs and a balcony, as well as an immersive game nook and adult-sized tube slide.

Bednark, the owner of Bednark Studio Inc., spent his childhood around creative people and places on Cape Cod. His dad had a millwork and woodturning business, and he spent multiple summers building sets for the many theaters in and around the peninsula. Now he works closely with companies like Nike, Google and Peloton to design and build immersive experiences that build brand recognition and loyalty.

A decade ago, Bednark had a 7,000-square-foot space and two employees. Today, he employs over 100 people in a 65,000-square-foot space in Brooklyn, New York. Soon he'll likely expand to a bigger studio.

Assembling a business is an art, Bednark realized — both require refinement, patience and craftsmanship.

Of all the big projects, Bednark says his biggest strength is finding the right people to work together. "I love solving design challenges by bringing the right group of artisans together," he says. "Finding the right people, for the right project — and seeing how that chemistry evolves and makes the project better than expected — is magic." ■

*Photos courtesy of
Bednark Studio*

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Improving the effectiveness and enhancing the lives of CEOs, business owners and key executives of small and medium-sized businesses.

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Out in front. Leading the pack. Carving a new path. These attributes commonly describe Vistage members. This issue of Vistage Perspectives magazine shines a light on several trailblazers, CEOs fueled by their passions and purpose, and challenged by their peers to push into new territory. They've built thriving organizations that help others live authentically, affect civic change, help seniors age in a dignified, sustainable environment ... and even make a better pizza!

Just as you learn from their business and leadership decisions, we hope you take inspiration from award-winning Chair Peter Schwartz. Peter epitomizes servant leadership and what it means to go above and beyond. Plus, discover Vistage programs that are helping CEOs execute more effectively and achieve their vision by developing the leaders they rely on.

It's a privilege to support you and this network of high-integrity leaders in making great decisions that benefit your companies, families and communities. It's an incredible honor to capture these stories on the pages that follow.

All the best,

Sam

Sam Reese
CEO, Vistage Worldwide



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What's the *Most Important Thing* You Do to *Develop Your Teams*?

At the beginning of every year, each member of our team shares development goals. Throughout the year, **we're proactive in looking for training and development opportunities aligned to their goals.** When we find one, all a team member needs to do is tell me the cost, the time they need, and how they think it will benefit them in their job. In addition, I send books and articles to the team on topics that may be of interest. We participate in frequent team-building activities. Sometimes they are around the behavioral assessment we use in our recruiting process. Other times it's a community service project or maybe just a team lunch. We share what we've learned through professional development with one another in our weekly team meetings.

— Jolene Risch

President and Founder, Risch Results | Dallas, Texas
Vistage member since 2020

Developing our people and our teams is critical. I work with each of my direct reports in **finding development opportunities that they are excited about** and buy into. Without the buy-in and the willingness to learn and stretch, development dollars end up wasted.

— Julie Thomas

President and CEO, ValueSelling Associates, Inc.
Rancho Santa Fe, California
Vistage member since 2014

Mentor younger business leaders. Each month at ForensisGroup, we watch "TED Talk Fridays" because I believe strongly in **cultivating a culture of intellectual curiosity and personal fulfillment.**

— Mercy Tolentino Steenwyk

President & CEO, ForensisGroup, Inc.
Pasadena, California
Vistage member since 2007

The most important thing is to **find ways for people to experience different aspects of the business.** Start by having the conversation with the employee to find out if they are interested in developing professionally. If they are, let them know you will find ways for them to have different experiences throughout the company. Have them lead a committee of cross-functional team members or spend time learning a different position by shadowing or doing a rotation into different departments. Have them attend meetings they would not normally attend at different levels in the company. This comes with some coaching and mentoring, and maybe even specific training. Assign them to bring questions or key takeaways from their experiences.

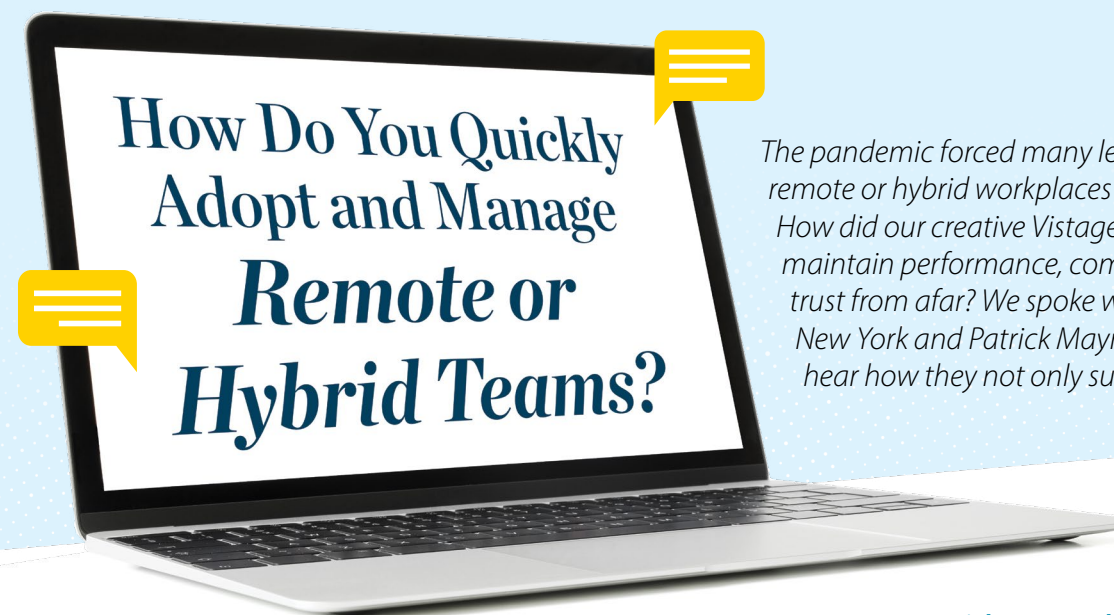
— Andrea Fredrickson

President, Revela | Omaha, Nebraska
Vistage member since 2014

Pay attention to culture. You can feel a culture when you walk through the door. Your employees will vote with their feet if you do not work every day to offer them an extraordinary experience while valuing their contributions. **Be a coach, not a manager.** Your employees do not like micromanagers. If you coach individuals so that they can become their best selves, you will be able to give and get real feedback. Coaching is a gift to be cherished in any organization. **Develop career paths.** Many employees will give up compensation if you are focused on helping them grow and learn. If you are spending more on finding new talent, divert those funds to keeping and developing the great talent you already have.

— John Dame

Harrisburg, Pennsylvania
Vistage Chair since 2007



The pandemic forced many leaders into managing remote or hybrid workplaces seemingly overnight. How did our creative Vistage community maintain performance, communication and trust from afar? We spoke with Marc Wolin in New York and Patrick Maynard, Ph.D., in Ohio to hear how they not only survived but thrived.

Marc Wolin is CEO of Seneca Insurance Co., a Crum & Forster company. Seneca's nearly 300 employees began working remotely, upending long-held procedures and workflows. The experience has informed Seneca's plans to adopt a flexible hybrid model going forward.



Patrick Maynard is president and CEO of I Am Boundless, a nonprofit that provides residential support, autism programs and other health services for people with intellectual and developmental disabilities, and behavioral health challenges. Remote working will likely evolve into a "hoteling" strategy (i.e., reserving desk space) for administrative roles post-COVID.

Wolin: It improved performance, in many respects. We did away with a large portion of our paper systems and came up with new work processes that were digital. Our tremendous employees really stepped up and got the job done. Some projects took half the time they would have before COVID-19 because people really put their noses to the grindstone.

Wolin: We had to have more meetings and more disciplined meetings. We are institutionalizing what we've learned with the goal of taking the best of this work-from-home environment and carrying it over.

Wolin: You have to have constant communication, and empathy is very important. Our teams thought of ways to stay connected virtually with fun things to do, like happy hours and other ways to keep the personal touch. We also reminded people about their mental health benefits. We let them know that they didn't need to be chained to their computers, and we encouraged people to take their vacations.

How has the shift to work-from-home or hybrid working affected your team's performance?

What processes or policies did you put in place to ensure solid communication?

What did you have to be mindful of to build and maintain trust across your team?

Maynard: We expanded in services, so performance increased. Before the pandemic, we were offering some virtual services, but it was mostly on the sidelines. When the pandemic hit, we had a tool in place and began using it more. In March, we were in 27 counties, and by December, we were in more than 50 counties.

Maynard: We had already been expanding geographically, which forced us to deal with engagement, training, oversight and accountability. The pandemic accelerated these issues for us. We decided that we couldn't over-communicate.

Maynard: Communicate, communicate, communicate. I knew our direct service providers had to go into the office, and I didn't want them to feel abandoned. So, I continued to go in and started doing fireside chats online from my office. The feedback was positive. They said, "You didn't abandon us; you helped allay my fears. You're answering our questions."

Photos courtesy of members

Elevating Your Team to Scale Your Business



After 10 years serving as the sole decision-maker for his software company, HCSS CEO Mike Rydin knew something had to change if he wanted to scale beyond \$1 million. He couldn't remain "in the weeds," answering all the questions, all the time. He needed to build up the leaders around him, developing employees who would be aligned with his vision and ready to execute.

This is a common challenge for CEOs. Nine out of 10 CEO members ranked employee development as "important" or "very important," in a recent Vistage CEO Confidence Index survey.

Today, Rydin and many CEO members are solving this challenge by leveraging Vistage Leadership Development Programs to develop the leaders they depend on. Each program adapts the Vistage model of learning and meets leaders where they are. It's a customized approach to align your leaders with your goals.

The result? The company that started with a mere \$8,000 in annual revenue surpassed \$100 million in annual revenue in 2020. HCSS now has 400 full-time employees and about 4,000 contractors across North America, and it continues to thrive. Rydin utilizes a combination of Vistage programs to achieve his goals.

Case Study: Mike Rydin focused on building up his people.

Name: Mike Rydin

Title: Founder and CEO

Company: HCSS, computer software for construction industry

Location: Sugar Land, Texas

Industry: Computer Systems Design and Related Services

Member since: 1996

Challenge: Scaling

In 1986, with no business education, "or ever having read a business book," Mike Rydin founded a software company for the construction industry out of his bedroom in Sugar Land, Texas. Total revenue for that first year was \$8,000.

After 10 years of running HCSS, Rydin built his company to 12 employees and \$1 million in revenue. But Rydin found himself stymied — with every staff member coming to him for everything all the time.

"I was up to my eyeballs, constantly working out the day-to-day problems of the business," he says. He knew he had to get out of the weeds and learn how to start delegating in order to scale. That's when he decided that joining Vistage could help. Through Vistage, Rydin gained insight and perspectives from peers on how to better manage and empower his team, allowing him to focus more on long-term growth opportunities.

As the company grew, Rydin decided to take it a step further in developing his staff. "I needed to build up the people around me," he says.

Program	Leadership Roles	Outcomes	Value to CEO
Chief Executive Small Business	CEO, President, Owner	Making great decisions to benefit company, family and community	
Key Executive	C-level Executives	Improving effectiveness of C-level executives to support strategy and drive results for CEO	Supporting the executives who help develop and execute strategy
Advancing Leader	Experienced and Advancing Managers	Develop strategic thinking and more effective execution skills to deliver results	Building leadership at all levels responsible for helping CEO deliver better results
Emerging Leader	Managers and Individual Contributors	Building foundational competencies for effective leadership	Building foundational knowledge to prepare the next generation of leaders
Vistage Inside	Teams and functional leaders within the same organization	Improving the effectiveness of teams to achieve specific results	High-performing team through improved alignment, collaboration and communication

Here is the full range of Vistage Leadership Development Programs available — including the new Advancing Leader Program.

Understanding the value he found in Vistage, Rydin put three of his executives in the Vistage Key Executive Program, where, for more than 10 years, they've been working on issues and learning how other executives deal with their respective CEOs. And due to their longevity, they've become leaders in their own Key groups.

More recently, he signed up 26 high-potential employees for the two-year Emerging Leader Program. "At this stage, I'm trying to develop them as leaders, and I was thrilled that Vistage had a program for that — and that I didn't have to figure out how to do it on my own," Rydin says.

Rydin says he's already seen better alignment and communication among his team leaders, allowing him to focus even more on strategy. The heightened collaboration should help Rydin and his team continue to grow — they hit \$100 million in revenue last year — and scale well into the future.

"The fact that during the first 10 years we went from \$10,000 to \$1 million — and in the next 25 years we went from \$1 million to \$100 million — I'm absolutely certain that we couldn't have done all the clever things we did, or have grown to that size, without Vistage," says Rydin.



Want to Hire and Keep Top Talent?

Employee Development is the Key.



By Joe Galvin,
Vistage Chief Research Officer

The competition for talent is intensifying as the economy rapidly expands and revenue projections of small and midsize businesses increase. A recent Vistage CEO Confidence Index revealed that 66% of CEOs plan to increase their head count in the next year so they'll be ready to scale.

Unfortunately, traditional hiring strategies are no longer effective as the sole means to source qualified applicants. To get high-quality talent, employers need both a competitive recruitment strategy and a comprehensive retention strategy.

Having a strong employee development program is key. In today's workplace, employees are looking for more than just a job: They want to improve their job performance, focus on personal wellness, expand their professional skills and support a purpose. Consequently, they will gravitate toward — and stick with — companies that actively invest in their people.

Here are two Vistage members who have taken employee development to heart and made it a competitive advantage for recruiting and retaining their employees.



Joe Kenner, photos courtesy of Greyston

From raw talent to seasoned employees

Case Study: Joe Kenner
President and CEO of Greyston | Yonkers, New York
(greyston.org)

Forget resumes, interviews or job applications. To get a job at Greyston Bakery in Yonkers, New York, you just need to put your name on a list. When a position opens, you're hired — no questions asked.

Greyston's approach might feel new, but it's not. For more than 40 years, the bakery has used open hiring to build its workforce of approximately 100 people, many of whom come from difficult circumstances or have struggled to find employment. Profitable since 2009, Greyston supplies millions of pounds of brownies each year to corporate clients across the United States. Ben & Jerry's packs them into pints of ice cream, Whole Foods sells them in its stores and corporations ship them off as client gifts. In 2020, bakery sales reached record heights.

"This is good business," says Joe Kenner, president and CEO of Greyston. "There's a financial argument, an ethical argument, a diversity-inclusion argument and an economic development argument. It's just a strong talent management strategy and a great business model."

Key to this model is Greyston's rigorous apprenticeship program, which helps new hires develop technical skills and soft skills over 6-9 months. Rotating between the bakery

I call this the next evolution in HR.

— Joe Kenner



A Greyston Bakery floor worker holds packs of the company's brownies.

floor, mixing rooms and packing areas, apprentices learn everything from safety protocols to conflict resolution to the history of the company. They also meet with the directors overseeing production, supply chain and manufacturing — all while earning wages as an hourly employee.

Upon completion of the program, apprentices "graduate" and become line workers. Over time, they can progress to more advanced positions in the bakery's mixing rooms or even gain training for leadership roles.

Greyston's training model is complemented by its Employment Pathmaker Program. Led by an on-site social worker, the program helps employees work through personal challenges that might impede their professional success, such as housing, childcare or addiction issues. Since implementing the program, turnover at Greyston has dropped from 60% to 23%.

"I call this the next evolution in HR," says Kenner. "People say, 'I want to be successful. But I also have some challenges. If you can help me sort through those, I will give you my time and skills.' And then they stick with us."



ASCI team members participate in a crane cage training exercise. Photos courtesy of ASCI.

In this six-month phase, employees complete a series of e-learning programs that explore topics such as effective communication and conflict resolution. They also complete a DiSC® Profile, meet with every leader at ASCI, and participate in a 360-degree assessment that identifies goals to work toward in leadership, productivity, management and more. Those goals are achieved with help from Hopkins, who personally coaches each employee for the next six months. From start to finish, each training cycle takes 18 months.

Hopkins knows this represents a major investment for ASCI — not to mention her own time. But it gets back to why the company exists.

Turning high potentials into high performers

Case Study: Christine Hopkins
President and CEO, Associated Service Companies
International | Anchorage, Alaska (asciLLC.com)

In the crowded space of supply chain management, it's hard for any business to stand out. But Associated Service Companies International (ASCI) does — namely because of its people.

Serving customers in industries including oil and gas, fisheries, mining, manufacturing, education, utilities, and health care, ASCI holds on to employees for eight years on average. "That's almost unheard of in companies that manage warehouses and laydown yards," says President and CEO Christine Hopkins. "Despite the fact that we have employees in such high-risk jobs, we have worked 640,000 hours without a recordable incident and more than 2.2 million hours without a time-loss incident."

Hopkins attributes much of this success to the company's robust leadership development program, which she designed and implemented in 2015. Before joining the company, Hopkins worked for more than 12 years in human resources.

The program begins with two courses — "Developing and Implementing an Outward Mindset" and "Outward Leadership" — that are taught by Hopkins, who is certified in these programs offered by the Arbinger Institute. During the training, Hopkins identifies high potentials — those who understand how their work impacts others and can make adjustments — and moves them to the next phase of training.

"If you look at our purpose statement, it is to inspire and cultivate people and businesses to thrive," she says. "For our employees, that means giving them the flexibility to be good at what they're good at, and the accountability that comes with that."

Employee development programs don't just unlock the potential of employees; they unlock a growth opportunity for companies. And as the competition for talent increases, development programs provide a solution to bolster performance and provide employee satisfaction as well. ■



ASCI President and CEO Christine Hopkins with team members from her leadership development program.

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Blazing Your Own Path

Sometimes you have to go your own way. The “why” can vary. You see an opportunity that no one else does. You have a project that speaks to your soul and demands your attention. You know you could do better — be better, climb higher — if you took the lead. And, honestly, you know it’s time to step up.

Whatever the reason, the result is the same. You make a move, go off on your own and see where the path takes you.

The Vistage members you’re about to meet had the passion, the drive and the confidence to travel down that unknown path. Buoyed by their peers and their Chairs, they overcame obstacles, built the right foundations, got the right people on the bus and pulled away from their competition.

They learned to lead in remarkable ways. They blazed a trail for others to follow. But most importantly, they had an impact, not only on their companies, but also on the communities around them.

“Distinctive impact isn’t about being big,” says bestselling author Jim Collins. “It’s about being distinctive but making an impact on the community you touch, however big or small that is.”

As you’ll read, going where no one has gone before can be the biggest gamble of your career ... and the best decision of your life.

Doing What Comes Naturally

Chris-Tia Donaldson noticed a gap in the market and spun it into a successful company and thriving nonprofit.

When Chris-Tia Donaldson first entered the corporate world, she knew she would be held to a “common beauty standard of blonde hair, blue eyes and straight hair,” she says. “And I was in the midst of growing out my relaxer.”

Transitioning to a natural hairstyle would take time, so Donaldson started wearing a wig. “I thought if I looked like a younger version of Claire Huxtable, then that — combined with my hard work — would lead to success,” Donaldson says. “Nothing was further from the truth.”

The move actually backfired, Donaldson says, as it hampered her ability to function in corporate America. It wasn’t until Donaldson started wearing her hair naturally that things turned around, and the experience spurred her to write a book, “Thank God I’m Natural,” as a guide for others facing similar challenges.

Keeping her natural curls while working her way up to senior corporate counsel at Oracle, Donaldson could’ve stayed on the corporate track. But the success of her book inspired Donaldson toward another path. She started researching and developing hair and skincare products. Two years later, she started launching product lines designed for those transitioning to a natural look.

When Donaldson finally left Oracle in 2017, her company Thank God It’s Natural (TGIN) had over \$1 million in annual revenue with products selling nationwide at



2020 Member Excellence Award winner
Chris-Tia Donaldson, photos courtesy of TGIN

“At TGIN, talent wins over everything.”

— Chris-Tia Donaldson

Target, Ulta Beauty and Whole Foods. The following year, the company made the Inc. 5000 list. “My ability to focus full time helped it to just explode,” she says.

Advocacy has always been a part of Donaldson’s life, she says, whether it was participating in the Girl Scouts, getting involved in student council or volunteering for various civic organizations. That advocacy soon became part of her career aspirations. In her entrance essay to

Harvard Law School, Donaldson wrote about becoming a labor lawyer and safeguarding the rights and wages of workers, ideals she continues to prioritize at TGIN.

“A huge part of my job as CEO is culture and ensuring that people are treated well by their jobs or creating an environment that supports people becoming the best version of themselves,” she says.

PASSION PLAY

The Unbeaten Path

Chris-Tia Donaldson wanted to help those in the general market transition to and celebrate their naturally curly hair.

Result

She founded a company whose hair and skincare products now retail nationwide.

Key Takeaways from David Galowich, Chris-Tia’s Chair

1. Lead from a genuine place of purpose, as Chris-Tia does. It has been documented time and time again that the highest performing leaders do this.
2. Develop and empower your team. This enables Chris-Tia to step away when needed for professional development, strategic thinking and personal time.
3. Make leadership a social process. Chris-Tia cultivates respect and boosts the people she interacts with, whether it’s peers, clients, employees, or a one-time interaction.

Thank God It’s Natural Founder and CEO Chris-Tia Donaldson (center, right) showcases some of her company’s products.

Another priority? Providing job opportunities to often-overlooked workers. During her company’s early days, Donaldson hired part-timers from hiremymom.com to handle customer service calls and social media work. When TGIN became her full-time job, Donaldson hired a team that was predominantly women of color.

“At TGIN, talent wins over everything,” she says.

Even today, through the eponymously named TGIN Foundation, Donaldson provides on-the-job staff training to help them fulfill the organization’s mission: delivering breast cancer awareness, information and services to young, uninsured women of color. Among its programs, the foundation partners with Lyft to provide rides to and from treatment.

The mission is personal: Donaldson was diagnosed in December 2015 and spent 2016 battling the disease. In 2019, she published another book based on her experiences.

“I saw how much money made a difference between living and dying,” she says. “Very few realize that the ability to pay for childcare, parking, transportation and meds, or take time off from work can affect cancer outcomes. So that is a huge thing that I’m very passionate about.”

Since joining Vistage in 2017, Donaldson has redoubled her efforts in both for-profit and nonprofit ventures. But now, she uses her Vistage peer group and Chair as sounding boards to sharpen her culture, manage wealth and ensure her priorities continue to shape TGIN’s evolution.

“For me, I quickly realized I had to be in Vistage,” she says. “I talk about what I need to be thinking about: financials, growth and exiting. And that type of advice just was not going to come to me outside of this network.” ■



All Fired Up

Kristian Tapaninaho and Darina Garland took their love for pizza and transformed it into a market-leading global business.

It started simple enough: Kristian Tapaninaho wanted to make the best at-home pizza he could.

Running a London-based global education business with his wife, Darina Garland, Tapaninaho had become obsessed with pizza making and trying to make restaurant-quality pies. And while he improved at selecting ingredients and mastering techniques, one obstacle remained: his kitchen oven.

"I thought, 'My pizzas are good, but they're not great,'" he recalls. Most types of pizza require higher temperatures than a domestic oven can deliver. This is especially true for Neapolitan-style pizza, which, in order to be called Neapolitan pizza, has to be cooked at close to 900°F.

Unable to get the temperatures he needed, Tapaninaho looked at buying a wood-fired brick oven, but he found them to be either too expensive or too bulky to fit in

the couple's garden. Seeing this as an opportunity to revolutionize home pizza making, Tapaninaho and Garland used their creative problem-solving abilities to build an at-home pizza oven that was both affordable and high quality.

The result was the Ooni, a petite, carbon-steel, half-moon-shaped oven that's been hailed as a category creator and game changer in the outdoor cooking market. Since launching in 2012, the company has reached 400% year-over-year growth and more than \$130 million in revenue. Ernst & Young named the company "One to Watch" at its 2020 UK Entrepreneur of the Year Awards and WIRED magazine naming the company's flagship model, the Ooni Pro, "Best Pizza Oven" of 2020.

Bootstrapped by the couple and with help from a Kickstarter campaign, Ooni has become a household name among pizza enthusiasts, thanks to its design, price point (ovens start at \$299) and portability, Garland says. The company has also benefited from being a direct-to-customer, primarily online business, though Ooni ovens are also sold at Selfridges in the UK. "Being an e-commerce business, we're not limited by geography," she says. "We've been able to scale up in the U.S., where there is a massive consumer market with big buying power."

That demand required Tapaninaho and Garland to scale up quickly after the ovens first hit the market. The couple moved Ooni Limited's base

of operations from London to Broxburn, located between Glasgow and Edinburgh in Scotland. "It's a great location for an outdoor cooking product company," Tapaninaho says.

As Ooni grew to more than 150 employees with offices in the U.S., Germany and China, the couple realized they should continue to focus on their company's culture, much like how they raised their at-home pizza game. "Because we had an education business before, we're very much focused on empowering staff," Garland says.

As part of this focus on people, Ooni recently raised its base salary to more than 45% higher than the national average for a living wage in the UK and gave all staff a 10% wage increase. Additionally, 1% of its annual revenue is donated to social and environmental causes. "Culture is the one constant you're able to build, and it's absolutely central to Ooni's future," Tapaninaho says.

As they scaled up, the couple discovered Vistage through a joint program with The Hunter Foundation, a Scottish-based nonprofit that works with ambitious, growth-driven companies. Soon, both Tapaninaho and Garland joined Vistage, looking to their peers for fresh perspectives and expertise.

"Our Vistage group wants to stretch us as leaders."

— Darina Garland



Kristian Tapaninaho and Darina Garland, photos courtesy of Ooni Limited

"It helps us identify gaps," Garland says. "We also love it that the group has such a growth mindset. Currently, our biggest focus is selling to the U.S., and not once has anyone said, 'You're doing great already.' They understand the ambition, and they want to stretch us as leaders."

While the global pandemic forced the company to shift operations to remote working, Ooni saw a profitable year in 2020 as many found themselves at home and, like Tapaninaho, hankering for a quality slice of pepperoni pizza. The couple plans to continue their scaling efforts and see their passion for cooking blossom even further.

"In 20 years' time, we want to wake up happy with what we built," Tapaninaho says. ■

PASSION PLAY

The Unbeaten Path

Kristian Tapaninaho wanted to create an affordable, portable, at-home pizza oven that produced restaurant-quality pies.

Result

Kristian and wife Darina Garland designed, built and launched Ooni Pizza Ovens, one of the fastest-growing companies in the UK.

Darina's Key Takeaways

1. Treat your customers as backers. They're partners who want you to win because, by default, they do, too. They're on the same side as you!
2. Hire and live by your values — and don't be swayed by experience if the values don't fit.
3. Don't go too wide. Choose a very focused focus, and focus!



The couple created products like the Ooni Karu (pictured) to help home cooks make better pizzas.

Enhancing Elder Care

Former economist Vassar Byrd found her calling at Rose Villa in Portland, where she sets a high bar for elder care.

There was a time when Vassar Byrd wanted to be president of the International Monetary Fund and help foster global economic stability. Then she got the bad news.

"I didn't realize you had to be French," she says.

Still, when you consider the drive it takes to pursue a goal like that, it's little wonder that Byrd has made her mark as CEO of Rose Villa, which contains the first-ever zero-energy senior-living neighborhoods in Portland on its campus. Next year, Byrd will complete the final phase of a 10-year, \$166-million expansion that will include two

independent-living neighborhoods and a 24-hour, long-term-care building.

With energy-efficient fresh air systems, innovative heat recovery systems and rooftop solar paneling, the neighborhoods within the 22-acre Rose Villa campus will produce a net-zero-carbon footprint.

When Byrd came on as executive director in 2006, Rose Villa presented a dilapidated physical plant with no investment in infrastructure. "There was no time clock and only one computer," Byrd recalls.

So how does an economist with a master's degree from the London School of Economics end up running a senior living community? It begins when Byrd returned home to Portland after stints with the U.S. Department of Commerce and a trade industry group in Washington, D.C., left her burned out. "I finally got sick of being there," she says.

While working for ECONorthwest, Byrd volunteered with Meals on Wheels, spending her nights and weekends providing nourishment and company to elders. Enamored by the lifetimes of stories she heard, Byrd decided to become more involved in elder care, eventually becoming a state-certified ombudsman inspecting nursing homes.

One day, she reviewed a small Portland nursing home and was horrified by the smell of human waste in public areas and residents left stranded in wheelchairs. A nursing assistant pulled her aside and told her to investigate the director of nursing services and the building's administrator. Within six

months, both staff members lost their licenses for selling the residents' medications.

Later, while having a beer with her best friend, Byrd mentioned the nursing home and how its residents deserved better. Her friend's response? Either shut up or do something about it.

That final push empowered Byrd to leave economics altogether and pursue a new career path: elder care.

"I wanted to have an alternative, hippie-commune, crazy-ass community that was different from anything I'd seen," Byrd says. "And that's actually what we created at Rose Villa."

As she planned Rose Villa's overhaul, Byrd joined Vistage in 2010. She found the outside perspectives refreshing and quickly developed a rapport with her Vistage Chair at the time, Wade Clowes. "He was a smart guy, and I could challenge him. And he knew how to deal with that," she says.

With the help of her group and Chair, Byrd cleaned up sloppy practices and unprofessional managers, and prepped her plan. Finally, in 2014, phase one of construction began. As Rose Villa transformed, Byrd occasionally hosted group meetings, judging the campus' progress by the shocked looks on her fellow members' faces.

"One of my personal missions is to restore elders to the rightful position of leaders in their societies."

— Vassar Byrd

2021 Member Excellence Award winner Vassar Byrd, photos courtesy of Rose Villa

But the more important looks belong to the residents who pushed for the net-zero-energy installations, Byrd says, the ones who don't mind getting the mail in the rain or starting a food composting program. "Those kinds of people live here already," she says. "So I can be dragged forward by them, or I could charge with them into the sustainability world."

Where she once saw decrepitude, Byrd now sees a community as bright, spirited and lively as its inhabitants. And she couldn't be happier.

"One of my personal missions is to restore elders to the rightful position of leaders in their societies," she says. "My job is to support them from underneath and let them keep living large for as long as they want to." ■

PASSION PLAY

The Unbeaten Path

Vassar Byrd wanted to help elders "live large."

Result

Byrd left a career in economics, became CEO of Rose Villa and built a state-of-the-art senior neighborhood with a net-zero-energy output.

Key Takeaways from Jim Plymale, Vassar's Chair

1. Life's too short to waste your time and talent. Do something that you love.
2. It's never too late to pivot to your passion and make a huge difference in the lives of others.
3. No matter how smart and accomplished you are, you can always learn and grow from the perspective of others, especially when their only agenda is your success.



CEO Vassar Byrd speaks with residents at the Rose Villa senior living community in Portland.

Laying the Groundwork *for a* Better Dallas

Through his firm and various civic groups, architect Darren James has built the foundation for inclusivity and community growth.

When you look at Darren James' career, it's hard to tell where his work as a professional architect ends and his work as a civic leader begins.

"It was never the plan, but they're so intertwined," says James. "A lot of the work I do is truly going to transform Dallas for the better, and it overlaps what I do on a daily basis. I joke from time to time that KAI is my night job."

To clarify, James is president of KAI Enterprises, an integrated architectural, engineering and construction services firm. But he also sits on several boards in the Dallas-Fort Worth area, affecting civic change that's as substantial as erecting new buildings.

Most notably, James is chair of the Dallas Black Chamber of Commerce — the oldest continually operated Black chamber in the United States — and board president of Fair Park First, a revitalization committee overseeing the restoration and management of Fair Park, home to both the State Fair of Texas and a history of racial animus. Taking on such roles is hardly the path of least resistance, but James says they've led to high rewards. "I've been able to take my experiences and grow my business and open some doors at KAI," he says. "But I also have a responsibility to take the information I have and share that with others so that they have similar opportunities."

James says he wouldn't have it any other way. Growing up in St. Louis, he developed a strong sense of civic duty



Darren James works with his team during a meeting at KAI Enterprises.

from his father and grandfather, both of whom were leaders in the Boy Scouts. Like his father, James was an Eagle Scout.

That civic-mindedness also bled into his love of architecture. At a young age, James began noticing the discrepancies between where he lived and other parts of the city. Ultimately, he became an architect with a focus on working in underserved communities in Kansas City and continued that work after moving to Dallas and joining KAI's Texas office in 2005.

"Our portfolio has traditionally been under-resourced, ignored communities," he says. "So that outgrowth of serving on the professional side led to what I do on the nonprofit side."

He soon joined the Dallas Black Chamber of Commerce, later becoming its chairman in 2016. Typically a resource for local Black-owned businesses, the chamber's mission

shifted when the COVID-19 pandemic hit in 2020. James directed the chamber to help member companies secure Paycheck Protection Program loans in the wake of the resulting financial crisis, then extended those services to nonmember companies. In some instances, he helped businesses retool their finances and establish relationships with local banks.

"I wanted to make sure that we were an asset to the community at large," James says. "Not every business was deemed essential like us (KAI as architects and engineers)."

PASSION PLAY

The Unbeaten Path

Darren James wanted a way to merge his work as an architect and civic leader and impact underserved communities.

Result

James leveraged several leadership roles, including his job as president of KAI Enterprises and his volunteer positions at the Dallas Black Chamber of Commerce and Fair Park First, to affect economic and social change.

Key Takeaways from Becky Powell-Schwartz, Darren's Chair

1. Listen with an open mind and be OK with discomfort. Darren listens to all sides and, given the institutions, he deals with a lot of discomfort. But that helps him get to a win-win solution for all.
2. Create a culture of trust. Darren is great at building teams he can delegate to. He leverages his time and talents toward developing and mentoring teams that can work independently.
3. Walk your talk. A lot of people give you lip service. Not Darren. He doesn't just say it; he does it.

James also got involved in a bid to revitalize the 277-acre Fair Park but had to choose between working on the project or serving on its board. He chose the latter, knowing Fair Park's past and its continuing, contentious relationship with the surrounding Black and Hispanic communities.

"I felt that I had a voice, perspective and agency to actually affect change," he says. "I wanted to be in the position to make sure that the residents around the park were a part of the future more substantially than they were in the past."

Still, James has learned a few tricks to manage his responsibilities, from being aware of his energy levels to delegating and taking time off to recharge. He's also found a resource in his Vistage Chair, Becky Powell-Schwartz, who helps clarify issues with James on both for- and nonprofit challenges.

"There's so much connectivity between who I am as a business leader and as a civic leader," James says. "Becky asks questions that are poignant and timely. She knows when to challenge and when to support. It's been very helpful."

The good news? The chamber has seen a huge uptick in membership this year, the Dallas City Council approved the board's master plan for Fair Park and KAI is expanding its operations. All of which means James is ready for his next "day job."

"It goes back to why I wanted to be an architect," he says. "The community can and should be better, and if I'm not going to do it, who is? I want to be part of the solution." ■

*2021 Member
Excellence
Award winner
Darren James,
photos courtesy
of KAI Enterprises*



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A Chair for All

Peter Schwartz aids both members and peers through challenging times.

In March 2020, with the world upended by a terrifying new disease in COVID-19, Peter Schwartz faced a crisis of his own.

His wife, Elaine, had just been diagnosed with a highly aggressive late-stage breast cancer. The Best Practice Chair for the D.C./Maryland/Baltimore area moved his home office from Virginia to the couple's South Carolina home to spend more time with Elaine.

He was handling a lot, but when he heard that a Vistage Chair had been admitted to Johns Hopkins' ICU due to complications from COVID, Schwartz decided to step in and step up.

Shaped by 17 years as an executive coach — and with an innate decency that friends and colleagues extol in him — Schwartz took over his colleague Gerry Stephens' two Vistage groups. He conducted regular meetings as well as one-to-ones with members from each group. Because work had migrated online, Schwartz could take on the extra workload while staying home to support Elaine while she battled cancer.

Four months after facing down death, Stephens recovered enough to resume his Vistage responsibilities. Months of rehabilitation still lay ahead, in which Stephens would build up his strength and physical abilities. But, thanks to Schwartz, Stephens' members continued to learn and grow.

"Any Vistage Chair would have done the same thing," Schwartz says. "What's extraordinary to me is that this spirit of generosity is considered ordinary in my Chair community."

This kind of selflessness belies Schwartz's tenure as a Chair who goes above and beyond, helping members and colleagues through divorces, drug addictions and crises with children.

For his dedication, Schwartz has won the Chair Excellence Award nine times and Master Chair six times. He earned the STAR Award from 2014 to 2016 and again in 2020 and was honored with the Robert Nourse Chair of the Year Award in 2015, a feat he thought would be his crowning achievement. His exemplary leadership in the face of this past year's unique challenges contributed to Schwartz earning the Don Cope Memorial Award for 2020.

"Sometimes people say, 'You give, you get.' Pete gives because it's the right thing to do," said Lee Peters, Vistage Senior Vice President for the East Region. "He is so aligned with our mission and has a tremendous impact on leaders."

Following a successful corporate career, Schwartz felt a calling to coach 17 years ago and earned an Executive Coaching Certificate from Georgetown University. When Vistage reached out to him in 2005, Schwartz realized the organization was a perfect fit.

"The articulation of Vistage's mission has changed over the years, but the one constant that has always resonated is 'increase the effectiveness, enhance the lives of CEOs.' That's what I do," Schwartz said.

Dedicated to helping business leaders in his region, Schwartz currently Chairs six groups with a total of nearly 100 members, including two Chief Executive groups, a Key Executive group, and a new Emerging Leader group. He's also introduced the first Vistage Executive Leadership Program, in collaboration with Stanford University, to the D.C. area.

"He has a passion for helping others grow and looks for every opportunity in the community to make a difference," Peters said.

I have gotten to a place in my life where there is no separation between what I do and who I am.

— Peter Schwartz

Elaine has recovered completely from her cancer, and Stephens has put COVID-19 behind him. Reflecting on the last year and looking forward to the future, Schwartz said he wants to "do the work in a way that brings honor and distinction to the award that I received."

"I have gotten to a place in my life where there is no separation between what I do and who I am," he said. "There is never a question about what you do because it's who you are." ■



*Cope Memorial Award Winner
Peter Schwartz, photo by Vistage*

Unparalleled Insights for Peak Performance

Exclusive access to some of the most trusted experts in business and leadership gives Vistage members a leg up on their leadership climb.

These thought leaders shared their exceptional insights at exclusive events with our community this spring and summer in order to help members navigate new challenges and possibilities.



General Colin L. Powell, USA (Ret.), in his exclusive engagement with Vistage, shared his most valuable leadership lessons as a four-star general, the first African-American Secretary of State and Chairman of the Joint Chiefs of Staff. Powell brought his skills as a storyteller to bear on the topics of building trust, growing your people, servant leadership and high-stakes decision-making.



Bestselling business author **Jim Collins** created four lessons exclusively for the Vistage community. They're based on his latest book BE 2.0, which distills concepts that Jim and his co-author and mentor, Bill Lazier, taught to their students at Stanford Business School to help leaders of small and midsize businesses build enduring great companies. His lessons touch on strategy, people, Level 5 leaders, and "The Map," an actionable framework that a CEO can follow to build a great company.



The **Women in Leadership** National CEO Conference offered a springboard of learning and connection for female Vistage members. With keynotes **Nicole Lapin**, bestselling author and veteran business news anchor, and **Andrea Jung**, President and CEO of Grameen America, attendees redefined what it means to be "superwoman," and explored the seven qualities of successful leaders.



Vistage on the Hill with the U.S. Chamber of Commerce returned for its third year. Chamber experts briefed members of the Vistage community on key policies impacting small and midsize businesses. This exclusive annual event gave members the opportunity to gain vital insights on issues significantly impacting their businesses. The event concluded with an interactive town hall, where members had a chance to voice their challenges and opportunities.



The CEO's Journey: People and Culture National CEO Conference posed a crucial question: "How can you be the leader your people need?" With insights from keynotes **Marcus Buckingham**, leader of the Strengths Revolution, and **Juliet Funt**, CEO of WhiteSpace at Work, attendees found answers through a lens of their employees' experience, gaining tools to strengthen their teams and sustain morale.



[Coming in January] **Patrick Lencioni**, author of the bestseller "Five Dysfunctions of a Team" is coming back to Vistage in 2022. He'll be diving into "Three Steps to Regenerate Your Team." Details to come!



The CEO's Journey: Fiscal Health National CEO Conference brought keynotes **Geoff Colvin**, Senior Editor-at-Large at Fortune, and **Karen Gordon Mills**, former Administrator of the U.S. Small Business Administration (2009-2013), to the virtual stage with proven tactics to help attendees take control of the why, what, where, when and how of investing in the health and growth of their businesses.

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Using Networks to *Pump Up* New Business

Entrepreneur and Vistage member Steve Gray has always been the life of the party. His family-owned business — i2k Inflatables — provides fun inflatables for parties and events, from jumpers to obstacle courses to customer-branded promotional inflatables.

When the pandemic put a halt to events and gatherings, it devastated Gray's Azusa, California-based business. But instead of cutting back on his marketing and branding investments, he decided to go all in.

"I'm a strong advocate of companies that bump up their advertising and branding in down economies," says Gray. "They are typically the ones that come out on top."

Equipped with a growth mindset, Gray kept his eyes on the Vistage Marketing and Media Network. As he scrolled through a thread started by a Vistage Chair looking for a top-notch marketing firm, Gray saw a response that intrigued him:



Steve Gray

"We work with businesses that have a big outcome they need to achieve and need a strategic approach to get there — we're business growers that just happen to carry a marketing toolbox," posted Chip Rosales, Vistage member and managing partner of Texas-based Rogue Marketing.

Bingo. The fellow Vistage members quickly launched a partnership to do exactly that — devise a new strategic approach for i2k and achieve a big outcome. The first order of business was to pivot i2k away from the amusement industry and accelerate growth in three key B2B markets: gymnasiums, military defense and fall-protection.

The new partners uncovered the opportunity for i2k to re-outfit gyms and trampoline parks with i2k's AirPads — gym owners saw Gray's products as a sanitary and safe alternative to foam pits. When Rogue focused marketing efforts on this niche market, Gray noticed that new gym customers began to call and email i2k daily.

The military and fall-protection products also took off with new product

placement on the website and Rogue's SEO strategy. "To get four government agencies interested in this new military product is definitely a win," says Gray.



Chip Rosales

To accelerate growth in the B2B markets, Rogue Marketing put into motion several cherry-picked strategies. For lead generation, the Rogue team focused on driving down cost per lead and boosting lead conversion through sales enablement tools. The Rogue team worked with i2k's salespeople to analyze and provide feedback on i2k's sales calls — a high-value process for refining over-the-phone sales language. The Rogue team is also facilitating an e-commerce platform so that customers can purchase noncustomized products directly.

In just less than a year of working with the Rogue Marketing team, i2k's first quarter exceeded its 2019 benchmark. "We are profitable," says Gray.

Gray's decision to reply to Rosales' Vistage Networks post became the catalyst for a revitalized business that has been part of Gray's entrepreneurial vision for more than 20 years.

"We can all go online and do a search for a marketing or branding company, but you never really know who they are or if they are the real deal," says Gray. "Having the Vistage access is an advantage. It's hard to put a price tag on it." ■

i2k's defense line of inflatables includes tactical training walls, vehicle decoys (pictured) and more to support military personnel training. Photo courtesy of i2k.



Life After the Sale



A yearlong trip around the world provides a global perspective

Bryan Jensen

Former CEO of Hort Tech Landscape Management
Joined Vistage in 2012

In 2007 I bought an existing business with the intent of selling. That was right before the Great Recession and, obviously, not the best time to sell. My five-year plan became a 10-year plan, and when the market firmed up, brokers approached me.

The sale process was long and frustrating. At one point, I was going to pull out of it, but my Vistage Chair pulled me back from the emotional edge. My group was also very helpful throughout the process. Apart from my spouse, they were the only people who gave me real feedback.

On the day the sale went through, I hit refresh on the browser about 60 times to check my bank account. It was a huge relief to see the money was there and the sale was final. Soon after, my family and I traveled the world for a year. We went all over — London, France, Rome, Australia, Scandinavia. We visited Costa Rica to surf, Japan to see the cherry blossoms and Egypt to explore the pyramids. The kids really embraced the big cultural differences. It gave them another perspective — and that's something I really appreciate.



The whole family in Egypt

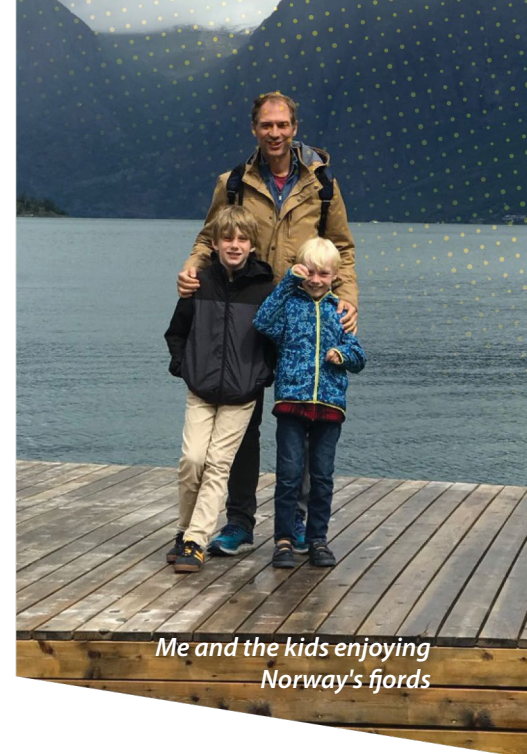
Photos courtesy of interviewees

We homeschooled the kids the whole time — four days a week for a couple of hours a day. Today, we all look back on the whole experience very fondly.

When we returned from traveling, we bought a house in Canada, which is where we are from originally. I started playing a lot of golf and was considering buying another business when the pandemic hit. Through it all, we have been able to do a lot of outdoor exploring and backcountry skiing locally. Plus the schools here stayed open, so our kids got to be with their peers.

What I would say to fellow Vistage members is that the sale of your business is always closer than you think — so be prepared. Make sure you have a good team, that the numbers add up and that your business is in order.

I'm only 50, and while I enjoy not having to work, I do miss being in the company of adults in a meaningful way — and getting things accomplished. That's why I plan to start looking for another business to buy.



Me and the kids enjoying Norway's fjords

Retire into the sunset? No way.

Jill Vitiello

Founder and former CEO of Vitiello Communications Group
Joined Vistage 2014

Over the past decade, we were able to double annual revenues and our team, which was my goal when I joined Vistage. But in recent years, our Fortune 500 clients were asking for expanded services and a global reach. So we set out to accelerate growth and partner with a company that could help us achieve both goals.

When we connected with Forty1 and The Creative Engagement Group (TCEG) based in the United Kingdom, we knew it was a great strategic and culture fit. It was important that our employees would be highly valued and have more opportunities. Also, it was important that my clients would have access to expanded, world-class services. With our acquisition by Forty1 and TCEG's parent company, Huntsworth, we achieved it all. And I've remained at the company, now known as Forty1-Vitiello, as partner and executive vice president.

For me, it was never going to be about retiring into the sunset. I am passionate about what I do, and now I can focus on representing our brand and contributing to thought leadership. My husband recently retired, and we're spending winters in Florida. That's allowed us to enjoy more time with our older daughter, her husband and our grandson. The rest of the year, we're back home at the Jersey Shore, visiting our younger daughter and her husband. I see more traveling when things open up again.

This was my company for 30 years — it was "my baby." I never wanted to be fully out of the arena. And so I found a way to begin to take my hands off the wheel and ease into a different way of being.

It's also deeply satisfying to know that "my baby" is in the very best hands. Nadine Green, a Vistage member whom I hired in 2014 to run operations,



La dolce vita! You can see my husband, Mike, reflected in my sunglasses!

“It's so important to be sure you are turning around and giving a hand up to whomever is behind you.”

— Jill Vitiello

Life After the Sale

is now chief operating officer of The Creative Engagement Group, North America. And Kristen Erickson, whom I hired as my assistant in 2012, is now heading up the company in North America!

There is a motto I live by that I borrowed from Dr. Charlotte Jones-Burton, co-founder of Women of Color in Pharma: “We lift as we climb.” It’s so important to be sure you are turning around and giving a hand up to whomever is behind you.

My husband, Mike, and me with our daughter, Dr. Vanessa Vitiello Williams, at her graduation party in Manhattan after earning her doctorate in psychology.



“Chairing has made me a better person.”

Carla Corkern

Former CEO of Talyst, LLC
Joined Vistage in 2008

When I was hired as CEO of Talyst in 2008, I had no illusions about what it meant to sit in that seat. I had owned my own company at age 26 and was running different businesses in my 30s — but this was a big step up, and I needed to surround myself with others at that level.

I joined Vistage right away. It’s really lonely at the top, and here you always have people on your side who have your best interests at heart. I’m like the poster child for Vistage; I believe in the model so much.

Talyst was backed by venture capitalists and was split and sold to a private equity group in 2017. At around the same time, my Vistage Chair stepped down, and I was approached by fellow group members about the possibility of leading. I’m the kind of person who believes whatever should happen does happen. The timing was right, so I went for it. I went to Chair Academy and built up the group.

As a Chair, I am able to spend a lot more time with my family. My son was a sophomore in high school when I started, and I worked out my schedule so I was able to make him breakfast and spend quality time with him.

Even though I own three hair salon franchises and am on four boards, I still have more time to spend with my family than I did as a CEO. In fact, when the pandemic hit, I was able to spend four months in San Diego to be with my extended family because I could do everything virtually.

Also, I think Chairing has made me a better person. Instead of just solving problems and being bossy, I have to ask questions and help others find their own solution. Chair development — the muscles you have to exercise — makes you a better listener.

At this point in my life, I want to make more of a positive impact on the lives of others, and that’s what I’ve been able to do in recent years. ■

My family at an outside Easter Sunday service, April 2021

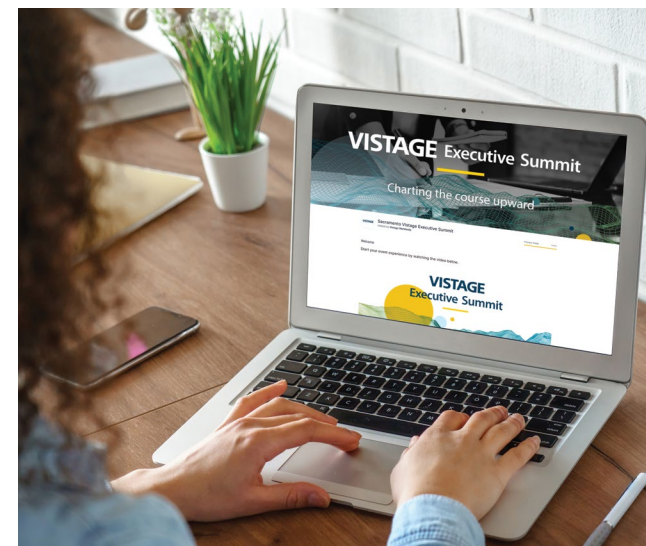


“This is the direct CEO interaction that is hard to come by anywhere else.”

- Vistage member

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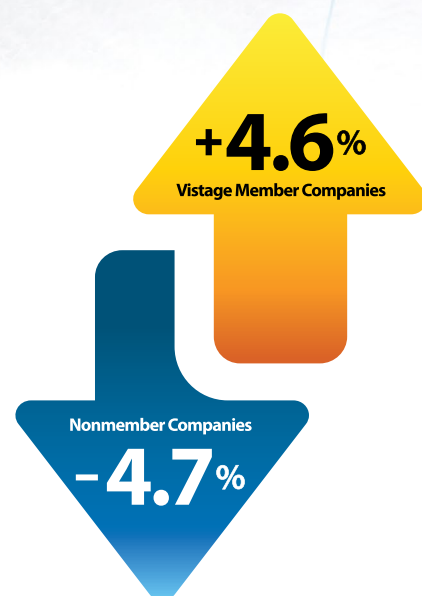
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*Analysis performed on Dun & Bradstreet data for U.S. companies with up to \$1B in annual revenue. The comparison was made on annual revenue growth (2020 vs. 2019) between Vistage member companies (sample size: 1,897) who joined the Chief Executive or Small Business programs prior to 2020 and a random sample of non-Vistage small and midsize businesses (sample size: 702).

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