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Designing an Executive Leadership Institute

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Thomas Jefferson University
Philadelphia, PA
Doctoral Programs
in
Strategic Leadership
and
Complex Systems Leadership

DESIGNING AN
EXECUTIVE LEADERSHIP
INSTITUTE



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STRATEGIC LEADERSHIP REPORT

Greater Philadelphia Senior Executive Group (GPSEG)

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Table of Contents

[Foreword](#)

[Preliminary Phase 3 Report](#)

[Operational Definitions](#)

[Executive Summary](#)

[Recommendations](#)

[Appendix I: Premise of the Inquiry](#)

[Appendix II: Idealized Design](#)

[Design Methodology Applied on April 14 Session](#)

[Appendix III: Synthesizing Research Results into Recommendations](#)

[Appendix IV: Idealized Design Output](#)

[Visual Representations of The Data Obtained From The Design Session](#)

[Appendix V: Literature Search and Learnings](#)

[Sources](#)

[Qualitative Analysis of the Data](#)

[APPENDIX VI: Interviews](#)

[Appendix VII: Survey of Executive Education](#)

Foreword

The Greater Philadelphia Senior Executive Group (GPSEG), now Beacon, one of the largest professional and networking associations in the PA-NJ-DE region, provides a unique environment for members to build trusted business relationships, to expand their knowledge and to advance their careers.

Dr. Larry M. Starr, Director and Dr. John Pourdehnad, Visiting Assistant Professor in the **Doctor of Management in Strategic Leadership (DSL)** Program at **Thomas Jefferson University (TJU)** engaged with Diane James, Executive Director of GPSEG and Jane Frankel Director of Internships and Corporate Partnerships and Assistant Professor at the **Temple University Fox School of Business** (Sponsors) to discuss how DSL could help GPSEG to address a leadership challenge. The results of this conversation produced a contract, approved by the GPSEG Board, in which a set of new workshops would be designed informed by systems thinking and design methodology that would be offered to members of GPSEG. Four Phases were proposed to be carried out by DSL faculty and doctoral students:

1. Identify and Invite Participants to a Design Workshop

GPSEG members as well as employers, HR representatives and recruiters (key stakeholders) were invited to a 3-hour workshop. These participants generated the input for the future workshops that will be delivered to GPSEG members. Also invited to this workshop – primarily as observers were some GPSEG members who were (1) seeking new positions; (2) considering application to a new position; and (3) interested in honing their leadership skills to remain competitive in today's changing environment. By attending/observing, members gained a keener understanding of “what the employers are seeking” in order to build personal and professional competencies and capacities of relevance to the employers and recruiters.

2. Engage in the Design Process

Employers/Recruiters were challenged to specify the properties, e. g., roles, competencies, capacities, and skills of the people *ideally* they would like to hire or recommend for hire in the *C-Suite environment*. This was a facilitated process that generates shared knowledge and creates an initial design for the *ideal candidate they would like to hire*. The output of this session, i. e., the characteristics and the ideal candidate, will become the input to the design of a curriculum – set of workshops – that will be offered to GPSEG members. By inviting to observe *without*

intervention/comment, GPSEG members (and GPSEG leadership if they wish to attend) will gain direct understanding of the needs and interests expressed by employers/recruiters.

3. Design and Develop Member Workshops

DSL will deliver a report that describes the knowledge acquired. Then, based on this knowledge and in collaboration with GPSEG, a set of workshops/education experiences will be defined, designed and developed. Topics/content will be drawn from what emerged from the ideal design session (Phase 2) and will reflect the interests and knowledge of employers/recruiters, members, GPSEG leadership, and PhilaU educators. Workshop descriptions will have educational objectives for knowledge/skills and where appropriate will be interactive, tool-oriented and enable direct application by members.

4. Market and Deliver Workshops

DSL will deliver** a set of integrated workshops to GPSEG members. Each workshop will be 3 hours in length, will be facilitated by a DSL educator, and will be delivered at TJU's campus or another location agreed upon by DSL and GPSEG.

** NOTE: In subsequent dialog with Sponsors it was determined that other resources may be called upon for execution of this step.

Preliminary Phase 3 Report

This is a working document. The design described here is very tentative and subject to change. No part of it will be finalized until the whole is finalized.

Suggested additions, deletions, or modifications are solicited from all who read this report. Those involved in the design process will consider the inputs received for incorporation into the next version of the design.

This record is not a literal transcription of what transpired at the design session on April 14th. It is based on the data collected in the design session and written and oral recollections of the facilitators augmented by their notes. Some data presented may have misinterpreted the will of the group. Nevertheless, this report is written in a positive mode in order to stimulate comments. Even where there was no resolution of differences among the participants/designers, we have chosen to be positive because we believe it will stimulate reactions and subsequent discussion. We are confident

that our misinterpretations will be subject to scrutiny and correction; they are not likely to sneak through.

Operational Definitions

Leader, Manager and Administrator: An administrator is one who directs others in the pursuit of ends by the use of means, both of which are determined by a third party. A manager is one who directs others in the pursuit of ends by the use of means that he or she selects. A leader is one who induces and guides others in the voluntary pursuit of ends by the use of means that they, the followers, select or approve of if they are chosen by another.

Strategic Leadership: Strategic leadership manifests in individuals as the capacity to anticipate, envision, maintain flexibility, and empower others to voluntarily make effective decisions and to create strategic change as necessary.

Competency: From a Systems Thinking perspective, competency is considered as an emerging property of the individual. This property emerges from the interaction of knowledge, understanding, skills, cognitive ability and the experience. As is often the case in business, competency is used to describe a measurable behavior/ability and technical skill/attitude linked to success in the workplace.

Curriculum: This refers to the subjects covering a course of study or a planned sequence of instruction supported by distinct learning objectives for the purpose of achieving a learning outcome.

Active Learning: Active Learning is a process whereby learners engage in activities, such as reading, writing, discussion, or problem solving that promote analysis, synthesis, and evaluation of presented content.

Action Learning: Action Learning is a process that involves a small group working on real problems, taking action, and learning as individuals, as a team, and as an organization. It is accomplished within an organization and helps organizations develop creative, flexible and successful strategies to pressing problems.

Executive Education: This refers to a specialized program that provides opportunities for executives or emerging executives to develop new competencies, knowledge and skills.

Executive Summary

This report is the result of a combined effort between Greater Philadelphia Senior Executive Group (GPSEG) and the Doctor of Management in Strategic Leadership (DSL) Program at Thomas Jefferson University (TJU). The objective is to utilize a four phase method, informed by systems thinking and design methodology, to successfully define, design, and develop workshops/educational experiences for leaders wherein they identify, gain, or enhance the necessary capabilities needed for not only today's but tomorrow's complex and dynamic business environment within our global knowledge economy. Key stakeholders were identified and invited to participate in a design workshop on April 14, 2016 at TJU. Human Resources employers and recruiters were asked to specify ideal competencies, skills, roles and capacities of the executives they would ideally hire for the C-Suite. The output data from this session, in conjunction with the literature research and one-on-one interviews conducted to identify workforce and leadership trends, competencies for 21st century leader, transition-related insights and barriers, and competitive landscape offerings, has produced the following recommendations as content for developing membership. A more in-depth description may be found in the Recommendations section of this report.

Executive intelligence: the ability to be self-aware, emotionally intelligent, credible and courageous, and allows a leader to pivot between collaborative and authoritative.

Strategic Thinking and Complexity Awareness: augments critical thinking processes and are crucial to the elimination of myopic perspectives:

Executive Presence and Storytelling: allows the leader to provide a clear message and enrich personal relationships.

Building Bridges: through communication skills motivated by the mindset of value-added relational capital creates the conditions for a leader to recognize not all solutions must come from him/her.

Talent Awareness: is not just the acquisition but the development of human capital to ensure a support team focused on the collective vision and capable of making complex decisions.

Entrepreneurial Edge: is achieved through design thinking and the generation of creativity and technology/innovation ultimately improving internal and external customer intimacy.

These emerging themes represent the leadership content most relevant and useful to design curriculum with a holistic approach to leadership development. However, because the content is not easily separated, the DSL Team recommends that careful consideration be placed on the delivery method and integration of material. Further recommendations include a survey of GPSEG members and stakeholders to clearly define areas of importance based on these findings. This will advance the definition of concentrated capacities as well as the design methodology and assist in the formulation of recommended learning objectives and outcomes. Each of the Four Phases contributes to and guides the development of workshops/educational experiences that center on the importance of balancing cognitive strengths such as complex problem solving, complex decision making, critical thinking, creativity, technology skills/innovation with disposition skills recognized and enriched through being authentic, conveying a clear message, and focusing on relational capital.

Recommendations

After careful consideration of the input from those who participated in the Phase 2 design session, Key stakeholders, recommendations of the GPSEG Sponsors, and the DSL Team, we have concluded that the following categories represent the leadership concepts most relevant and useful to design a curriculum from which a program of executive education can be drawn for GPSEG members. The content categories are presented for consideration prior to moving forward with establishing learning

objectives or learning outcomes. To ensure greater alignment with GPSEG member interests, we recommend that a survey be created to allow members to rate and prioritize these content areas in terms of importance to them and to the communities from which they are drawn.

- **Executive Intelligence.** To be a leader is to be cognizant of how you “show up” in the context of others, and in the context of the organization. This facet of development includes building self-awareness, emotional intelligence, credibility and courage. Leveraging one’s own strengths to focus on others to achieve common goals and alignment is what leadership is all about. Flexing one’s people skills, including motivation, will allow leaders to pivot between being collaborative and authoritative.
- **Strategic thinking and complexity awareness.** Most executives are clear about their perspective and base it directly on their past experience. However, they may not be as clear about how to articulate *how* they think strategically, understand complexity, and *how to define* their awareness of the “current state” of industry. As a result, they may be perceived as being less innovative and more myopic in their approach.
- **Executive presence and storytelling.** Leaders struggle conveying a clear message. This shows up in how they discuss their point of view, value proposition, and what makes them stand apart. Some may come across more transactional and “traditional,” and less courageously risky and entrepreneurial. One’s personal narrative must disclose a passionate purpose – beyond “getting it done” and “been there, done that.”
- **Building Bridges.** Strengthening communication skills, Board of Director relations, networking and learning to build relational capital regardless of whether or not one is carrying a briefcase. Many leaders walk into a room with suit and title, and expect to be asked to solve problems. Building relational capital turns this around so leaders use self-awareness to build bridges with others.
- **Talent Awareness.** Organizations require more attention be placed on human capital. Changes in the areas of talent development, talent acquisition, inclusion and unconscious bias, demographic shifts and succession require leaders to take active steps to harness and support engagement. Leaders must be aware of cutting edge strategies and communicate how implementing those strategies will achieve organizational objectives.
- **Entrepreneurial Edge.** Many leaders come with decades of success built on outdated systems. Today’s leaders must understand the *gig economy*, be an intuitive strategist, recognize trends in technology, and take risks including application of intentional disruption. Armed with processes, methods and tools for innovation and design thinking, recognizing market opportunities and communicating an approach to maintain an entrepreneurial and nimble edge will allow leaders to develop in their careers.

Appendix

Appendix I: Premise of the Inquiry

The following question was posed by GPSEG: **What are the attributes and characteristics of a member of the C-Suite necessary for success as a 21st century leader?** The responses were sought in order to design a curriculum from which an educational program including workshop courses would be developed and made available for their membership with the purpose of enhancing employability and competencies of executive career management. The DSL team subsequently posed deeper inquiry.

The premise of inquiry revolves around the increasing evidence that the success of organizations and the acquisition of competitive advantages are primarily dependent on increasing customer satisfaction. Greater customer satisfaction, in turn, can only be obtained by increasing one's knowledge and understanding of user and market needs and desires. Customer desires are changing rapidly and are increasingly difficult to predict. This is becoming even more difficult as a result of growth in the digital economy and globalization of the marketplace, which is ever more dynamic and complex. In such an environment, it is also increasingly difficult to predict important aspects of the future, including customer and consumer desires and needs.

Through a preliminary search of available literature and targeted interviews, we identified that it is obviously desirable for GPSEG to serve members and stakeholders better, but doing so has become increasingly different than in the past. A monolithic mass market with homogeneous users no longer exists; the market has evolved to become increasingly fragmented. In general, users and stakeholders are more diverse and more demanding. This has given rise to a number of questions that challenge organizations such as GPSEG: What drives member behavior? What motivates them? What kind of curriculum/courses should it provide and at what price? How should it help members specify its offerings and use them effectively? Until recently, member organizations have addressed these questions with traditional marketing research. However, recent literature on marketing research increasingly points toward the development of alternative approaches. The following represents the current reality:

“It seems traditional market research no longer works with an increasingly diverse and capricious customer base. The methods marketers have relied on for decades, perfunctory written and phone surveys, are nothing more than tracking studies, designed to measure if

customers are little more or less pleased with you than they were last year. Even standard focus groups may have outlived their usefulness. People often lie about their feelings if the rest of the group disagrees with them, and their memories of their encounter with your company may not be fresh.” (Lieber, 1997, p. 102)

Although discussion of the methodology of such research is not new, infusion of systems thinking into it is. For example, can any amount of analysis, in contrast to synthetic thinking, explain consumer behavior? By what processes can consumers discover what they want? What is the balance between ‘necessity is the mother of invention’ and ‘invention is the father of necessity?’ Dichotomizing market research into the so called ‘traditional’ versus ‘non-traditional’ does not serve the field well, since ultimately there is no one approach that provides all the ‘right’ answers to the emerging questions. The various social sciences and the various ‘schools’ within these sciences are like the proverbial blind men touching different parts of the elephant. Thus they are actually describing different ‘aspects’ or ‘levels’ of social psychological reality. Therefore, we decided to use a very different style of inquiry. We decided to design a balanced approach, employing both traditional and non-traditional market research. The aim of this study was to acquire a comprehensive knowledge and understanding of what customers and consumers (stakeholders) want, rather than merely collecting data and generating information about these desires.

Especially, we decided to use consumer idealized design (CID), a particularly attractive non-traditional way of studying consumers/stakeholders, which engages a carefully selected group of stakeholders in a creative design of an ideal offering. CID is fundamentally different from focus groups in which participants are asked to react to preconceived, already partially designed offerings. The purpose of CID is to produce a design that a relevant and representative group of stakeholders prepares and considers to be ideal. As suggested by the thought-leader for this approach,

“Producers often try to find out what consumers want by asking them. This seldom yields useful information because consumers either don't know what they want or they try to provide (or avoid) answers they think are expected of them. In many cases a better way consists of using the consumer to design products or services. It is harder for a market researcher to get inside a consumer's mind than it is for a consumer to turn his mind inside out.” (Ackoff, 1986, p.4)

In particular, even when consumers are aware of what they want and are willing to reveal it, their wants are likely to be strongly influenced by what is available. And when the product or service

available is basically unsatisfactory to them, they are unlikely to reveal startling new desires or concepts. The insights resulting from CID are qualitative in nature but appropriately designed quantitative research can provide valuable complementary knowledge and understanding.

Appendix II: Idealized Design

Idealized design is a problem solving and opportunity discovery methodology that is considered an example of 3rd generation design thinking. 1st generation design thinking involves expert (professional) designers who create products or services for clients, i.e., *designing for users*. 2nd generation design thinking involves expert (professional) designers who immerse themselves into client situations and engage directly with clients for their ideas then create products or services for them, i.e., *designing with users*. 3rd generation Idealized design thinking considers the users the experts and places the power of the design with them. In this approach of *design by users*, facilitators enable and support the users and stakeholders of the product or service to design what they want for themselves.

The Idealized design methodology unleashes and capitalizes on the creativity that resides in the stakeholders. Although inspired discoveries are often attributed to talented individuals, it is more often that for complex challenges, novel and creative solutions emerge from the “wisdom of the crowd” or a heterogeneous community assembled to brainstorm. The combined intellects of group members, often representing different disciplines and experiences, can create the intellectual environment in which truly new ideas emerge. The important thing is to provide the right mix of experience and skills so that the combined knowledge and understanding of the individuals can be unleashed on the complex challenge. Furthermore, the opportunity to act as a designer for an agreed ideal outcome and then work toward the realization of that outcome motivates the stakeholder to be creative. A participative process enables the stakeholders collectively to specify the characteristics and properties of the ideal outcome or system they wish to create. By engaging in an iterative design process the purposes, functions, processes and structures of a leadership curriculum may be elucidated.

The idealized design methodology begins with the disruptive statement that the current leadership courses and workshops that exist within GPSEG were destroyed but that GPSEG personnel, knowledge and environment remained intact. The purpose of this is to avoid suggestions about improving or adding to any current products and services, because if nothing exists there is nothing to improve. As nothing exists, the design challenge is to identify and describe the characteristics of a leader that the

stakeholders would prefer right now if they could have anything they wanted with the only constraints being feasibility, technological reality and sustainability in the current and anticipated environment. The product of this design session is not ideal or utopian because it is subject to subsequent improvement from within and without. Rather, it is called "idealized" because it is the best ideal-seeking (sub) system its designers *can imagine* when they prepare it. The ideal it seeks is expressed in the mission statement of GPSEG. The designers recognize, however, that they and others may be able to imagine a better design in the future, especially after implementing the one now being prepared. Therefore, the curriculum designed must be flexible — ready, willing, and able to change — so that GPSEG can learn, and thereby improve and adapt it to changing conditions. This enables GPSEG to maintain or increase its effectiveness to its community under changing internal or external conditions.

Design Methodology Applied on April 14 Session

On April 14, 2016 a workshop was conducted on the campus of Thomas Jefferson University to solicit input and insight from participants (GPSEG members/stakeholders and recruiters) about the competencies a senior executive needs to lead in the 21st century knowledge economy. Specifically, the invited participants were asked to both think about the challenge of 21st century leadership and identify specifications a leader needs to be successful in that environment. The ultimate challenge was to create this series of workshops using design thinking methodology, and allowing the DSL doctoral students to play an active role in the process.

Participants in the meeting were challenged to specify the building blocks that will inform the curriculum. These are the properties, e.g., roles, competencies, capacities, and skills of the people *ideally* they would like to hire or recommend for hire in the *C-Suite environment*. The meeting was a facilitated process that generated shared knowledge and created an initial list of specifications for the *ideal candidate they would like to hire today*. The output of this session, i.e., the characteristics of the ideal candidate, as well as results of traditional research becomes the input to the design of a curriculum – set of workshops – that will be offered to GPSEG members. By inviting additional participants to observe *without intervention/comment*, the design content was able to take advantage of additional ideas that these people held. Then via an open conversation at the conclusion of the session with the additional participant (observers), additional characteristics of an ideal candidate design emerged.

The session morphed into a more active discussion and generated a brainstormed list of skills, capabilities, and behaviors the participants suggested were critical for senior executive success. The ideas were recorded and posted for review then the DSL doctoral students captured the data to use in the subsequent steps of the process.

Appendix III: Synthesizing Research Results into Recommendations

The results of an idealized design process often yield a great deal of information that may seem random. There are a few techniques used to organize the information, along with the subsequent research and trends, and focus the results leading to recommendations.

The process involves a combination of divergent and convergent steps where a field of view is expanded and narrowed down again to fit within the area of study. It is important to recognize that while the divergent thinking process can cause stress for those who are looking for concrete answers, it is a valuable exercise. It allows for creative ideation and thinking that goes beyond common assumptions. Design thinking requires this interplay between divergent and convergent thinking to provide rich, insightful results as the subject matter is broken down and reassembled in new ways.

Additionally, integrative thinking enables unique solutions to emerge. The process of solution generation is encouraged to operate within the tension between seemingly opposing ideas. By avoiding decisions that are based on an either/ or decision between sub-optimal solutions, creative new solutions can emerge. Often the new solution takes elements from the opposing ideas and creates a superior new solution thus avoiding choosing one at the expense of the other.

For the design session output, identifying the frequency of terms is a good proxy for knowing what is important to the participants. The following processes were used to achieve this end:

- Quantifying the qualitative results was done through the identification of repeated words and counting root words. The counts were then incorporated into a Wordle that offers visualization into the word count.
- Affinity groupings were used to combine terms that were similar. For example, the term “teach” is almost interchangeable with the term “train” allowing for them to be combined.
- The use of Pareto charting measured the frequency of the term, word, or affinity group to allow for trends. These trends were included in the Bubble Chart to show emphasize and emerging themes.

- A literature review was done to examine the number of studies on shared topics such as requirements for c-suite executives in the global economy of today and tomorrow, global workforce trends, competencies for the 21st century leader, transition-related barriers/insights and a review of competitive market/current market offerings in executive education.
- Output from the idealized design session was broken down into 2 logical groupings. The lists were further refined based on those ideas that seemed to be higher priority as a result of the quick voting exercise. This became a base to refer back to as recommendations were developed and confirmed linkage to what the stakeholder group came up with in the idealized design session.

An analysis and synthesis of all information, literature and trends led the DSL Team to compare and contrast different results. The result of this process incorporated the various sources to identify emergent trends that informed the recommendations found in this document.

Appendix IV: Idealized Design Output

The output presented below is an unedited list. Numbers at the end of phrases represent the additional votes displayed during the exercise.

<ul style="list-style-type: none"> • Visionary • Intellectual curiosity / lifelong learning • Outcomes focused / results oriented • Authenticity • Empathy • Talent assessment • Talent acquisition • Talent management • Positive energy • Create a sense of purpose • Inclusive • Open-mindedness • Create followership • Role modeling with performance & engagement of team & organization • Ultimate keeper of the brand & deliver on the brand (5) • Coaching is a key role, allow others to take risks & push back (1) • Networking - new currency • Balance transformation with maintaining continuity (too fast/slow) & outward • Communication (1) • Culture manager • Do not be the smartest person in the room/humility. • Comfort w/ambiguity (1) • synthesizer (1) • Manage change & successfully produce it. • Dynamic problem solver/analytic skills (5) • Creative destruction/changing model (1) • Constant reinventing. (1) • Balance between tactical & strategic • Grit • Differentiate between CEO & c-suite & how do you pull them together • Make better faster & more nimble decisions • Recognize the benefits of disruption (either via new employee or innovation) • Strategic hiring allows for destructive input (1) • Cultivate people & anticipate industry trends (1) • Approachable & people have to want to follow you • Give up their ego - not a knower but a learner 	<ul style="list-style-type: none"> • Failure as learning opportunity • Encourage risk • Big thinkers/bold • Engaging diversity • Read customer/know their needs before they do • Pulse on the market • Flexibility with direction (course correction) • Sense making • Question everything • Listening/defining problem/creative problem solving methodology • Fulfil established need vs. Innovative marketplace • Resiliency (3) • Audacious/courage/tenacity/grit • Leverage tech across generations • Be nimble • Be disruptive • Social/civic responsibility • Appreciation for structure/culture of organization • Political savvy • Proven ability to operate in different cultures • Listening/understanding customer • Patience • Leading/role modeling collaboration internal + external • Business acumen/value proposition • Soliciting feedback from stakeholders • Communicating w/workforce in the way that they communicate • Internal/external networks • Integrity/experience • Understand impact of social media • Assess what's working/not working • And having the courage to make the change • Balance sheet business • Connect across generations/use tech • Create connections • Passion • Understand impact of technology & how to leverage for the brand more than do • 2 way communication • Teacher (team needs to change as org. Changes) • Create vulnerability & safety • Create followers/coaching 	<ul style="list-style-type: none"> • Sense of self (capabilities & limitations) • Recognition of feelings & shared directions • Continuous learner & present curiosity • Know how to learn & ferret out solutions • Recognize that people matter, aware of the org. Culture & growing the people • Compassionate • Smart recruiter & get right people • Confidence to enable others to rise up • Global mindset & think more broadly • Courage to make tough decisions • Hire smart people • Context • Culture clash • Internal structure • Political sensitivity to navigate • Culture/ context • Personalities differentiates & mindset • Is a company a product? They are a context • Create safe space • C-suite • Senior leaders report to the CEO • Manages the strategy of company • Members the board considers the standards of the business (1) • Out of a 360 degree view every aspect is represented by the c-suite • Create functionality of the leader & give leaders structure • Make decision over functional area & building consensus • Function & plus cross function • Members have vantage point of company of where company is & where company is going • Set directional future of organization (1) • Everyone excited about mission of organization (1) • Responsible for getting decisions made • Role • Transformation, strategically & breakthrough (1) • Reinvention & risk taking (4) • Compelling sense of purpose • Relationship builder • Technological literacy • Balance between depth & breath • Communication skills outward facing • Manage change in terms of preventing unwanted change & bring on desirable (2)
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The DSL team took the raw data output from the Idealized Design session and separated the comments into 3 categories: **Attributes** of a C-Suite Leader, **Actions** required of a C-Suite Leader, and **Other**. The **Other** category was used as a place to move the few comments that did not seem to fit in the other 2 categories. Once the list was split into essentially 2 sub-categories, **Attributes** and **Actions**, the comments were ordered using the voting scores and the **Other** category was integrated. The items with the additional votes appear at the top of the list in bold, and progress down based on the number of votes. Items that did not receive additional votes are listed in a random order.

ATTRIBUTES	ACTIONS
<ul style="list-style-type: none"> • Ultimate Keeper Of The Brand And Deliver On The Brand • Dynamic Problem Solver/Analytic Skills • Resiliency • Comfort W/Ambiguity • Compassionate • Courage To Make The Change • Courage To Make Tough Decisions • Excited About Mission Of Organization • Global Mindset And Think More Broadly • Grit • Intellectual Curiosity / Lifelong Learning • Political Savvy • Synthesizer • Teacher (Team Needs To Change As Org. Changes) • Visionary • Appreciation For Structure/Culture Of Organization • Approachable And People Have To Want To Follow You • Audacious/Courage/Tenacity/Grit • Authenticity • Big Thinkers/Bold • Business Acumen/Value Proposition • Compelling Sense Of Purpose • Confidence To Enable Others To Rise Up • Continuous Learner And Present Curiosity • Empathy • Flexibility With Direction (Course Correction) • Give Up Their Ego - Not A Know-er But A Learner • Inclusive • Integrity/Experience • Internal/External Networks • Members Have Vantage Point Of Company Of Where Company Is And Where Company Is Going • Open-Mindedness • Outcomes Focused / Results Oriented • Outward Facing Communication Skills • Passion • Patience • Personalities Differentiates And Mindset • Political Sensitivity To Navigate • Positive Energy • Relationship Builder • Sees Failure As Learning Opportunity • Sense Of Self (Capabilities And Limitations) • Social/Civic Responsibility • Technological Literacy • Proven Ability To Operate In Different Cultures 	<ul style="list-style-type: none"> • Coaching Is A Key Role, Allow Others To Take Risks And Push Back • Communication • Constant Reinventing • Create A Sense Of Purpose • Create Vulnerability And Safety • Creative Destruction/Changing Model Daily, Quarterly, Yearly • Cultivate People And Anticipate Industry Trends • Encourage Risk • Engaging Diversity • Hire Smart People • Strategic Hiring Allows For Destructive Input • Transformation, Strategically And Breakthrough • Understand Impact Of Technology And How To Leverage For The Brand More Than Do • Read Customer/Know Their Needs Before They Do • Pulse On The Market • Manage Change In Terms Of Preventing Unwanted Change And Bring On Desirable • Reinvention & Risk Taking • 2 Way Communication • Assess What's Working/Not Working • Balance Between Depth And Breath • Balance Between Tactical And Strategic. • Balance Transformation With Maintaining Continuity (Too Fast/Slow) And Outward • Be Disruptive • Be Nimble • Communicating W/Workforce In The Way That They Communicate • Connect Across Generations/Use Tech • Create Connections • Create Followers/Coaching • Create Followership • Create Functionality Of The Leader And Give Leaders Structure • Fulfil Established Need Vs. Innovative Marketplace • Culture Clash • Culture Manager • Culture/ Context • Differentiate Between CEO And C-Suite And How Do You Pull Them Together • Do Not Be The Smartest Person In The Room/Humility. • Know How To Learn And Ferret Out Solutions • Leading/Role Modeling Collaboration Internal + External • Leverage Tech Across Generations

	<ul style="list-style-type: none"> • Listening/Defining Problem/Creative Problem Solving Methodology • Listening/Understanding Customer • Make Better Faster And More Nimble Decisions • Make Decision Over Functional Area And Building Consensus • Manage Change....Successfully Produce It. • Manages The Strategy Of Company • Networking - New Currency • Responsible For Getting Decisions Made • Role Modeling With Performance And Engagement Of Team And Organization • Talent Assessment / Acquisition Management • Understand Impact Of Social Media • Recognition Of Feelings And Shared Directions • Recognize That People Matter, Aware Of The Org. Culture And Growing The People • Recognize The Benefits Of Disruption (Either Via New Employee Or Innovation) • Question Everything • Set Directional Future Of Organization • Soliciting Feedback From Stakeholders • Smart Recruiter And Get Right People • Sense Making
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The raw data was shared with the Sponsors and reviewed by the DSL team in its entirety. As preparation for the DSL team to begin their work, a meeting was held on June 4th with the Sponsors to further discuss and define a path forward. In this meeting Jane Frankel presented a preliminary set of six (6) topics for consideration along with sub-topics and learning objectives. The topics and learning objectives were broad, and competencies and capabilities offered in the workshop output were not isolated to the categories provided. The DSL team aligned the raw data under the proposed topics and, where applicable, data was repeated across the broad topical categories. The topics and corresponding data output include:

1. Authenticity with impact

<ul style="list-style-type: none"> • Resiliency • Visionary 	<ul style="list-style-type: none"> • Comfort w/ambiguity • Appreciation for culture of org 	<ul style="list-style-type: none"> • Teacher • Approachable so people want to follow
<ul style="list-style-type: none"> • Audacious/courage/tenacity • Compelling sense of purpose 	<ul style="list-style-type: none"> • Authenticity • Create a sense of purpose 	<ul style="list-style-type: none"> • Big thinker/bold • Confidence to enable others to rise up
<ul style="list-style-type: none"> • Empathy • Passion • Positive energy • Sense of self (capabilities and limitations) • Question everything 	<ul style="list-style-type: none"> • Give up their ego • Patience • Relationship builder • Create vulnerability and safety • Empathy 	<ul style="list-style-type: none"> • Open mindedness • Personality & mindset differ • Sees failure as learning opportunity • Understand feelings and shared direction

2. Understanding the current landscape

<ul style="list-style-type: none"> • Comfort w/ambiguity • Political sensitivity to navigate 	<ul style="list-style-type: none"> • Global mindset & think more broadly • Constant reinventing 	<ul style="list-style-type: none"> • Visionary • Read customer/know their needs before they do
<ul style="list-style-type: none"> • Pulse on the market 	<ul style="list-style-type: none"> • Assess what is working/not working 	<ul style="list-style-type: none"> • Listening/understanding customer

3. Executive presence and credibility

<ul style="list-style-type: none"> • Ultimate keeper of the brand and deliver on the brand • Courage to make tough decisions 	<ul style="list-style-type: none"> • Compassionate • Excited about mission 	<ul style="list-style-type: none"> • Courage to make the change • Political Savvy
<ul style="list-style-type: none"> • Visionary • Outward facing communication skills • Relationship builder 	<ul style="list-style-type: none"> • Approachable so people want to follow • Political sensitivity to navigate • Create a sense of purpose 	<ul style="list-style-type: none"> • Compelling sense of purpose • Positive energy • Do not be the smartest person in the room/humility

4. Strategic Choices

<ul style="list-style-type: none"> • Dynamic problem solver/analytic skills • Flexibility with direction (course correction) • Political sensitivity to navigate • Transformation/strategic breakthroughs 	<ul style="list-style-type: none"> • Synthesizer • Vantage point of company (Where it is and where it is going) • Creative destruction/changing model • Listening/defining problem/creative problem solving methodology 	<ul style="list-style-type: none"> • Visionary • Outcomes focused/results orientation • Hire smart people/strategic hiring • Sense making
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5. Execution

<ul style="list-style-type: none"> • Dynamic problem solver/analytic skills • Proven ability to operate in different cultures • Encourage risk • Reinvention and risk taking 	<ul style="list-style-type: none"> • Manage change in terms of preventing unwanted change and bring on desirable • Coaching is a key role, allow others to take risks and push back • Engage diversity • 2-way communication 	<ul style="list-style-type: none"> • Fulfil established need vs. innovative marketplace • Creative destruction/changing model • Teacher • Balance between depth and breadth
<ul style="list-style-type: none"> • Balance between tactical and strategic • Culture manager • Be Nimble 	<ul style="list-style-type: none"> • Balance transformation with maintaining continuity (too fast/slow) • Inclusive • Talent assessment/management 	<ul style="list-style-type: none"> • Role modeling with performance and engagement of team and organization • Manage the strategy of the company

6. Financial Literacy

<ul style="list-style-type: none"> • Business acumen/value proposition 	<ul style="list-style-type: none"> • Outcomes focused/results orientation
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The team discussed the potential of either retaining the topics or altering them. It was agreed that the research and analysis done by the DSL team would drive the ultimate recommendations.

Visual Representations of The Data Obtained From The Design Session

Data can be interpreted in several ways and the DSL team determined that a visual representation would be useful for the purpose of both framing the literature scan and also presenting it to the Sponsors.

Figure 2.



Appendix V: Literature Search and Learnings

The DSL team focused their research and discovery into four areas, as outlined below. A fifth area, surveys for validation, was seen by the team as an important item to consider ensuring the recommended content resonated with the GPSEG membership. At this stage a sample survey was conducted and highlighted in the next section.

- Workforce & Leadership Trends
- Competencies for 21st Century Leaders
- Competitive Landscape Offerings
- Transition-related Insights & Barriers

- Sample Survey For Validation

Sources

A wide variety of sources were accessed to help gain perspective of the research and focus on the expected needs for leaders to be successful in the 21st century. Attention was given to skills, competencies and also issues related to talent acquisition or executive career management. Units of analysis were identified by the DSL Team in concert with conversation with the Sponsors and included:

- Cognitive Abilities
- Vision & Presence
- Relational Abilities & Emotional Intelligence
- Social Intelligence
- Technology
- Innovation
- Communication
- Business Acumen

The list below is a representation of sources accessed by the DSL Team.

- | | | |
|---|---|---|
| • MIT Sloan Management Review | • Journal of Applied Business & Economics | • Design for Affect |
| • Harvard Business Review | • Journal of Leadership in the 21 st Century | • SHRM |
| • Knowledge@Wharton | • International Journal of Disclosure and Governance | • Center for Healthcare Governance |
| • Korn Ferry Institute & Hay Group | • Creighton Journal of Interdisciplinary Leadership | • Executive Leadership Council |
| • McKinsey Quarterly | • Journal of European Industrial Training | • IBM Institute |
| • Institute for Research on Technology Management & Organizational Learning | • Vistage International | • Association of Chartered Certified Accountants (ACCA) |
| • Connective Leadership Institute | • Forbes | • Center for Creative Leadership (CCL) |
| • Chicago Booth | • Small Business Association | • Career Partners International (CPI) |
| • Columbia University | • Leadership Toolbox | • Lee Hecht Harrison (LHH) |
| • AON Consulting | • IDEO | • Challenger Grey |
| • Deloitte and Bersin | • International Coach Federation | • Project Zero |
| • Spenser Stuart | • Kotter International | • Minds at Work/Robert Kegan |
| • Stanford University | • PSPS | • Daniel Goleman |
| • HR Resource Systems Group | • World Institute for Action Learning (WIAL) | • CFO Thought Leaders |

Qualitative Analysis of the Data

Workforce & Leadership Trends

The most comprehensive relevant findings came from the 4th edition (2013) biennial *Global CEO Study Series* conducted by IBM Institute for Business Value and IBM Strategy & Change. The DSL Team highlights this work based on its high level categorical findings that the Team also believes most identified with suggested GPSEG themes.

The study consisted of 1541 CEO face to face interviews from September 2009 through January 2010 with a representation from 60 countries and 33 industries, and an analysis based on long-term (4 years) and short term (1 year) operating margin growth rate. Additional data was gathered from 3619 students from 100 Universities (46% MBA/Grad degrees; 3% Ph.D.; 54% undergrad/various programs).

The key findings:

Complexity

Complexity was the primary challenge identified and 79% of CEOs expect an increase in complexity issues, referred to as the Complexity Gap, while over half of CEOs doubt their ability to manage complexity. Issues mentioned include their awareness of the increasingly interconnected economies, enterprises, societies, and governments leading to the need to understand the ultimate consequences of decisions, the external forces impacting organizations with regard to marketplace factors and technology, and the need to demystify/standardize complexity to navigate through it successfully.

Those who identified successful strategies to bridge the Complexity Gap, called “Standout CEOs” (Standouts), turned increased complexity into financial advantage through:

- Practice & encouragement of experimentation
- Innovation in leadership & communication
- Creativity to make deeper business model changes leading to strategy realization
- Customer intimacy: Design thinking/co-creating products with customers
- Management of complexity on a systemic level (organization, customers, partners)
- Designing for speed and flexibility

The study pointed to three over-arching areas of focus required to lead: Creative Leadership, Customer Relationships, and Operating Dexterity.

Creative Leadership

Sixty percent (60%) felt the top leadership quality is Creativity. Disruptive Innovation/ continuous re-invention was seen resulting from breakthrough thinking, questioning the status quo, and being comfortable with and committed to ongoing experimentation. In addition, there is recognition for:

- Importance of a new mandate of immediacy and recognition of the time constraints in conducting studies and reviews
- Mastering analytics to decrease uncertainty resulting in answers that are swift and correct
- Creating adaptive business models through innovation/fluidity of business design
- Creating conditions to encourage a mindset of questioning
- Coaching other leaders
- Balancing communication approaches to be effective; including vision from the top and social media

For the Standouts, 74% take an iterative approach to strategy, 54% rely on quick decisions to avoid unnecessary delays, and 58% prefer to persuade and influence in their leadership

Customer Relationships

88% of all CEOs and 95% of Standouts define the key to realizing their strategic potential is customer intimacy. Increased supply of products, services, and experiences decreases customer loyalty and developing a new mindset and approach to decision making guided by customer needs is needed. In addition, leveraging the information explosion (closing the gap between data rich and insight poor) requires the move away from Internal//external collaboration and toward a co-creation model. The study emphasized that ever-changing customer needs requires continuous engagement and measurement of value, co-innovation and on-going interaction with customers that begins with providing process transparency.

Operating Dexterity

The need to simplify interactions with customers and operating strategies was reinforced by 61% of Standouts who intend to simplify operations, increase speed and flexibility to generate new revenue sources, integrate functions to create empowered teams and enable faster decisions, and extract value from options increasing efficiency and effectiveness. Other items of note include:

- Leveraging benefits of analytics to move from soloed approaches to organizational empowerment
- Relying on strategic vision to provide clarity in the dynamic, complex, global business world
- Increasing speed of execution through streamlining processes
- Aligning metrics and objectives to identify successful patterns
- Creating a continual feedback loop to modify actions quickly when necessary
- Identifying new growth opportunities both globally and locally
- Replacing fixed costs with variable costs through strengthened partnerships

Identified Skills as Required for Leadership

The most notable information was offered from the World Economic Forum: Davos. In their *Future of Jobs Report* the top ten skills were identified and outlined below:

Top 10 Skills In 2020	Top 10 Skills In 2015
1. Complex Problem Solving	1. Complex Problem Solving
2. Critical Thinking	2. Coordinating with Others
3. Creativity	3. People Management
4. People Management	4. Critical Thinking
5. Coordinating with Others	5. Negotiation
6. Emotional Intelligence	6. Quality Control
7. Judgement & Decision Making	7. Service Orientation
8. Service Orientation	8. Judgement & Decision Making
9. Negotiation	9. Active Listening
10. Cognitive Flexibility	10. Creativity

The DSL Team placed a high priority on scanning the literature and identifying themes to inform the recommendations for content considerations. In addition to the skills above, the themes below were identified using the following:

- http://www.huffingtonpost.com/jeffrey-m-cohn/leadership-qualities-that-matter-the-most_b_4726694.html
- <http://www.mckinsey.com/global-themes/leadership/how-new-ceos-can-boost-their-odds-of-success?cid=other-eml-alt-mkq-mck-oth-1605>
- <http://www.mckinsey.com/industries/infrastructure/our-insights/the-leadership-challenge-building-the-future-of-global-infrastructure?cid=other-soc-lkn-mip-mck-1606&kui=ZpWXmvV4S Uy4HoSkM1uNlg>

- https://www.chicagobooth.edu/executiveeducation/programs/management/advanced-management-program?utm_campaign=amp&utm_source=LinkedIn&utm_medium=display&exed-dp-li-pd-amp-chicago-20160505
- <http://www.mckinsey.com/global-themes/leadership>
- <http://www.futureceoprogram.com/about-us/a-meeting-of-minds/>
- <http://www2.deloitte.com/us/en/pages/human-capital/articles/introduction-human-capital-trends.html>
- <http://www2.deloitte.com/us/en/pages/operations/articles/cxo-confidence-survey.html?id=us:2pm:3lp:cxoconf16:eng:cons:051116>
- <https://www.weforum.org/agenda/2016/05/how-to-be-a-leader-in-the-digital-age/>
- <https://hbr.org/2016/01/how-to-decide-what-skill-to-work-on-next>

Additional Themes

Discernment

- "Successful executives have to be able to **discern** the really important decisions and get a high percentage of them right," says Warren Bennis, a professor at the University of Southern California and co-author with Noel Tichy of "Judgment: How Winning Leaders Make Great Calls." "This is the heart of great leadership, especially now when so much is changing so quickly."

Mobilization

- **Mobilize their people** to take action.
- **Mobilizing** teams to function as a high-performing group, second only to creating a shared vision.

Decision-making

- Good **decision-making** usually reflects an executive's overall business philosophy and management style.

Brainstorming

- **Brainstorming** - executives depend on frank discussions with subordinates to help them make good decisions.

Taking Quick Action

- A data-driven look at the link between the strategic moves of new CEOs and the performance of their companies highlights the importance of **quick action** and of adopting an outsider's

perspective.

Authentic Leadership

- **Authentic leadership**, listening, and getting comfortable with being uncomfortable.

Gender Challenge

- Breaking down the **gender challenge**

Technological Change

- Embracing **technological change**

Innovation

- Growth through **innovation**

Disruptive beliefs

- **Disruptive beliefs** is a new approach to business model innovation

Alignment

- Organization wide **alignment**
- **Align** others around initial objectives
- Create a shared vision and **alignment** around their strategic direction across the organization --built **buy-in** and communicated a vision to their teams and their organizations.

Culture

- Organizational **culture**, which all executives rate as the hardest area to understand
- Business, **culture**, team, and self—require different tools and resources to successfully engage with each one
- Unlock knowledge and capabilities across the entire organization and to lead **cultural change** that places consumer awareness and social impact high on the agenda
- Transform organizational **culture**

Communication & Collaboration

- Effective at **communicating** which initiatives would not continue, given identified priorities
- Fostering cross-functional **collaboration**

Self-Management

- If empathy is the outward looking part, there's also an internally focused component. This comes in the form of a high degree of self-awareness: the ability to really understand and get in touch with how you think and feel, and what motivates you as a leader, and as an individual.

Group Behavior

- Develop techniques to shape **group behavior**, and gain an understanding of the relationship between individual behavior and organizational performance, as well as an awareness of the impact your behavior has on others.

Social Media & Digitization

- Consumer savvy, **social media** tuned, and IT capable

Multitude of Disciplines

- Working with people across a **multitude of disciplines**

Talent

- Attracting **new talent**
- Retaining **top talent**

Organizational Models

- Developing new **organizational models**

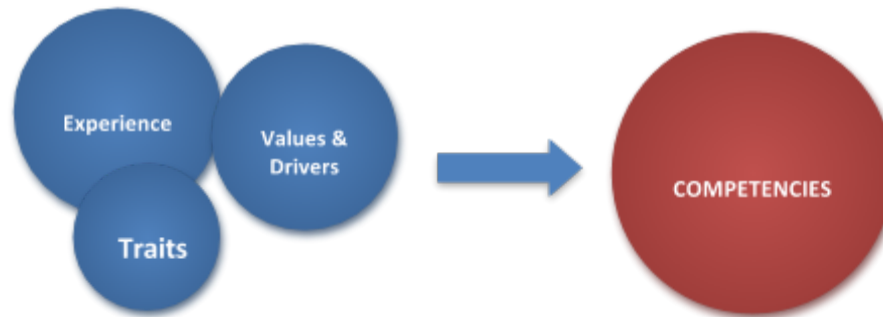
Competencies for 21st Century Leaders

Much research has been done on competencies. Most notably, the work of Michael Lombardo and Robert Eichinger, as founders of Lominger, the Center for Creative Leadership, Saville Holdsworth Limited (SHL), Developmental Dimensions International (DDI), Hay-McBer and PDI-Ninth House. Lominger and PDI-Ninth House were both bought by Korn Ferry International who bring together multi-rater assessment data, talent acquisition, and massive data-bases that inform their, and others' competency frameworks and standards most executives and organizations today adhere to. These are benchmark frameworks that the DSL Team assumes all senior executives have that resulted in their success thus far.

However, the DSL team recognizes that it is critically important to understand what is not included in the above-mentioned competency models as the missing factors required for leaders in the 21st century who face a dynamic and ever-changing landscape. In its simplest form, competencies are

measurable characteristics related to success at work, and can be observed. They are behaviors and approaches that enable a leader to succeed in their environment.

Figure 3.



Where they come from.....How they are observed.

What is known, and backed by research, are the competencies that are critical to performance for a senior executive that are also correlated to factors of emotional intelligence (EI) and learning agility (LA) which have been generally accepted as mission-critical competencies for leadership. While EI was popularized by Daniel Goleman the term was created by Peter Salavoy and John Mayer who defined it as the ability to recognize, understand and manage our own emotions and recognize, understand, and influence the emotions of others. Learning agility, according to Bersin by Deloitte, is the most important factor for successful leadership and refers to the speed one learns and patterns information. Some define this as learning new information while others focus on the learning strategy. For the purpose of this report the DSL team believes LA is *the speed with which one learns and applies meaning necessary to take action*.

For the purpose of this project the DSL Team culled through the list of competencies that are used globally and accepted as industry standard. The following list outlines those competencies for senior executives that are also linked to performance, emotional intelligence and learning agility. While others are relevant, the Team believes these are most aligned with the rest of the research we uncovered.

- *Making Complex Decisions*
 - o *Manages Complexity – making sense of complex, high quality and sometimes contradictory information to effectively solve problems (linked to LA)*

- *Decision Quality – making good and timely decisions that keep the organization moving forward*
- *Creating the New and Different*
 - *Global Perspective – taking a broad view when approaching issues, using a global lens*
 - *Cultivates Innovation – creating new and better ways for the organization to be successful (linked to LA)*
- *Taking Initiative*
 - *Resourcefulness – Securing and deploying resources effectively and efficiently (linked to LA)*
- *Managing Execution*
 - *Directs Work – Provides direction, delegating and removing obstacles to get work done (while not linked to LA or EI this competency is not is high availability at the senior level and is an important competency to display when securing a new role)*
- *Building Collaborative Relationships*
 - *Manages Conflict – Handling conflict situations effectively, with a minimum of noise (highest link to EI)*
 - *Builds Networks – Effectively building formal and informal relationship networks inside and outside the organization (while not linked to LA or EI it is seen as one of the hardest competencies to develop. It is also in high availability at the senior executive level and the focus will need to be applying the network and not building it)*
- *Influencing People*
 - *Drives Engagement – Creating a climate where people are motivated to do their best to help the organization achieve its objectives (linked to EI)*
- *Being Authentic*
 - *Instills Trust – Gaining the confidence and trust of others through honesty, integrity and authenticity (linked to EI)*
- *Being Open*
 - *Demonstrates Self-Awareness – Using a combination of feedback and reflection to gain productive insight into personal strengths and weaknesses (linked to EI and low availability across senior executives)*
-

Being Flexible and Adaptable

- *Manages Ambiguity – Operating effectively, even when things are not certain or the way forward is not clear (linked to LA and EI and high developmental difficulty)*
- *Nimble Learning – Actively learning through experimentation when tackling new problems, using both success and failures as learning fodder (Linked to LA and performance)*
- *Being Resilient – Rebounding from setbacks and adversity when facing difficult situations (linked to EI and performance; high availability among senior executives)*
- *Situational Adaptability – Adapting approach and demeanor in real time to match the shifting demands of different situations (linked to EI, LA and performance, and is high in developmental difficulty and low in availability among senior executives).*

* Operational Definitions adopted from the Leadership Architect® competency model. A member of the DSL Team is certified in competency modeling.

Transition-Related Insights and Barriers

Information was gleaned from a variety of sources including executive recruiters, members of a global career transitions firm across 45 countries, career transition coaches, and talent development professionals who actively teach, train and coach senior leaders. This information was combined with forward-focused pieces from Harvard Business Review, Forbes, and research arms of Deloitte (Bersin), McKinsey, the Executive Leadership Council, IBM Global Services, among others. The information was consolidated and distributed among the content categories outlined in the recommendations section of this report.

The negative factors outlined as significant barriers to executive employment and internal career management includes:

- Inability to inspire, communicate vision and purpose, and influence through dynamic messages
- Struggle identifying key stakeholders and spheres of influence, and building relational capital
- Poor understanding of how to translate basic networking into a functional competency used for managing one's career; in other words, it is more than a friendly cup of coffee
- Lack of self-awareness and a struggle with the courage to take action

- Poor recognition of the needs of the workforce, their burning imperatives in comparison to the leader's, and the necessary levers to drive engagement
- Myopic perspective of industry trends and global disruption, tendency to share what they know rather than discover what they don't know
- Failure to create a narrative all (staff, boards, colleagues) can follow and share examples of how they over-communicated when necessary
- Misunderstanding about how to make decisions when they don't know the answer. Often turn to what they did before without accurately assessing the dynamic landscape

Competitive Landscape Offerings (See Also Appendix VI)

A review of education-related programs (Programs) was conducted and crossed a large range of providers. The Programs selected cost anywhere from a few hundred dollars for online formats to in person programs ranging from a few thousand dollars upward to \$50,000 +. Time commitments can be from one-hour lectures to multi-week and even international exposure.

Sample in-person Non-Degree Programs include:

- Yale School of Management, Global Leader Program- 5 weeks \$56,000 (incl. meals and lodging)
- Columbia University, Leadership Essentials- 2 day program \$3,500
- Columbia University, High Impact Leadership- 6 day \$11,000
- U of Pennsylvania, CEO Academy- 2 day program for \$20,000.

Sample Online Learning:

- Harvard Publishing's 44 Online "Skill Packs" access \$400 for one year.
- Vistage and Sage –learning from peers and access to learning modules
- SkillSoft's Leadership Advantage was only offered through business-vendors and individual license can be upward of \$7,000

The reoccurring topics appear below but they vary greatly in their basis in theory and offering tools for application to real-world scenarios:

- Understanding Leadership- personal leadership, leading others, business leadership
- Innovation/ agility
- Ethics

- Managing and developing people
- Managing change
- Global acumen
- Leveraging cultural differences
- Emotional intelligence

The delivery format components include:

- Individualized assessment and feedback,
- Mentoring/ Role Models
- Peer-to-peer networking
- Leadership coaching
- Experiential learning
- Topic-based workshops/ lectures

Societies and membership associations did not widely published organized learning opportunities.

Highlights of findings for local groups include:

- BNI (Business Network International) – Does not appear to have a local presence but remote networking and seminars are open to members
- EO (Entrepreneurs Organization) – Has a local presence but no learning and development opportunities
- YPO (Young Professionals Organization) – Has a Philadelphia area chapter and New Jersey chapter although the only learning option appears to be a week-long event associated with Harvard Business School. No curriculum is available.

APPENDIX VI: Interviews

Interviews were conducted with leaders recommended by the Sponsors. **Interview Methodology**

Interview subjects were chosen by Jane Frankel, GPSEG and were interviewed in June/ July 2016. The subjects were Dylan Baird of Philly FoodWorks and Suzanne Gaber of Gauze.

To prepare for the interviews the Team researched the individuals and their company in advance to gain an understanding of their history and knowledge about their business. Interviews were conducted in person and over the phone depending on the preference of the interviewee. The interviews were recorded to allow us to review the conversations and share insights. The format of

the interviews was informal, but was guided by the key questions our team wished to explore. Questions were modified or omitted if they did not seem to fit the circumstances and to facilitate the flow of conversation. For example, when interviewing Dylan Baird, who did not have any experience with executive education, questions relating to his experience were not explored.

The questions that guided the conversation were:

- Demographic and personal info- Name, title, background, current business.
- What special skills did you bring to your business?
- What could someone bring to your business in order to take it to the next level?
- What are the most challenging issues senior executives are facing in the knowledge economy? What is their most pressing problem?
- What do you believe needs to be strengthened in order to overcome these issues?
- Can you tell me what characteristics your ideal 21st century executive leader possesses? What areas of expertise would you expect from a senior executive?
- What competencies, skills, and/or abilities do you believe need to be strengthened in senior executives in order to support achieving desired results?
- Please describe your most important/influential leadership experience. What was the driving factor that led to its impact on you?
- Would it be possible to replicate that driving factor and if so, how?
- Have you ever attended an executive education program? If so, what specific action items aided in your retention of knowledge gained? What worked and what absolutely did not work?

Observations from the interview with Dylan Baird

Dylan is a young entrepreneur who co-founded Philly FoodWorks, a distribution company for small urban farmers in Philadelphia based on a Community Supported Agriculture (CSA) model. He won \$70,000 in 2013 from a shark-tank type competition (Be Your Own Boss Bowl) sponsored by Temple and used that money to start the venture.

Highlights-

- He is realizing he can't do it all anymore, they are in the process of figuring out how to organize themselves better and communication is important as they grow.
- Since no one knows how to do everything, it's important to have people around you who are experienced and provide advice

- They are also interested in bringing people into the organization that helps provide the skills the founders lack- he often associates expertise with older, wiser people.
- Leaders need to let go of their ego. They need to ask for help or advice from others
- It's important to think of problems as shared, **I** don't have a problem, **we** have a problem and be open to other people's input
- The benefit of their small size and flexibility is that it enables them to act quickly and not get bogged down in process. They look for technology that is easy to implement, cheap and does the job. They figure things out and often just use technology to build whatever they need for the moment. They use things like excel spreadsheets and Mail-Chimp
- A leader should be a visionary, be passionate, create something people care about, have positive values
- When a leader attracts people and doesn't follow-through or continue to provide the support to individuals, the individual gets lost or disoriented and things fall apart
- It's important to know how to manage different types of people, how to relate to them and communicate in a way that works

Observations from Interview with Suzanne Garber

Suzanne is an entrepreneur, author and film maker. She is multi-lingual and has lived and worked in many different countries such as Algeria, Spain, Dominican Republic, Egypt, Mexico, the UK. In 2015 she wrote a book, SAFETY NETwork: A Tale of Ten Truths of Executive Networking and in the same year launched the business Gauze.

Gauze is the world's first and only global database of hospitals—public, private, and military—outside the US that is vetted by professionals and able to be sorted according to the needs of international expatriates, study abroad students, volunteer staff and international travelers.

Highlights

- To operate in today's global market you need to be adaptable and a personal interest in different cultures fosters better understanding of people
- You need flexibility to change when things don't work out as planned, has the vision and is able to express it in a way that gets people excited about the company.
- Business leaders need to have the ability to execute, be accountable, have good problem solving skills and perseverance.

- The ideal 21st century leader needs to have good communication skills, the ability to influence others and vision
- Her most important/ influential leadership experience was going to Brazil and taking on an international assignment for FedEx. Wanting to connect with people on a personal level and learning the language gave her the opportunity to express her interest in being part of their team as the leader and not set herself apart from the people who were working for her.
- Views on executive education? Not sure you can teach good leadership skills, such as communication, but that would be important as well as possibly teaching practical skills the executive may be weak on like accounting for someone who focused on science for example and never had exposure to general business skills.

Appendix VII: Survey of Executive Education

The information contained in this document came from websites as noted after each entry. The webpage was last accessed on 6/25/16. Wording may or may not have been modified.

Belmont College: High Performance Leadership Bootcamp

Program Description:

3 day program, Cost – Available by request.

Program equips leaders with self-awareness, feedback, coaching and development planning to get them on the right track for future leadership growth. There is no one “right” style of leadership – the challenge facing leadership learners is not to try and copy one person’s example, but to discover their own unique strengths and leadership style. This program combines a hands-on business simulation with individualized assessments, coaching and feedback, to create a compact high-impact learning experience.

- Work in active, engaging learning environment with peers from top organizations
- Participate in business simulation
- Receive individualized assessment, feedback and coaching
- Create a high-performance individual development plan
- Discover the leadership best practices that drive organizational performance
- Know your leadership style and how to be the best “you” you can be
- Grow your network

- Learn from executive role models

Session Topics:

- Strategic thinking
- Engaging and developing others
- Inspiring and motivating people
- Driving results
- Leadership orientation
- High performance motivations

<http://www.belmontleadership.com/workshops> (Belmont College)

Columbia University: Leadership Essentials

Program Description:

2 days, \$3,500

Columbia Business School Executive Education offers non-degree programs in leadership, strategy, finance, and more. Designed for high-impact business leaders, programs teach actionable skills that allow you to make an immediate impact on your organization.

Session Topics:

- Leadership styles
- Emotional Intelligence and Leadership Effectiveness
- Leadership and Organizational Change
- Leadership and Group Dynamics
- Leadership and Personality

Columbia University: High Impact Leadership

Program Description:

6 days, \$11,000

Session Topics:

- Model of Organizational Performance and Change

- Managing Change: Exploring Underlying Assumptions
- Understanding your change management practices
- Leadership styles
- Group Dynamics
- Organizational Climate and Feedback
- Dimensions of Culture and Leader/Manager Behavior
- Self-Management & Leadership
- Managerial Decision Making / Managing Trust
- Myers-Briggs Type Indicator
- One-on-one action planning

<http://www8.gsb.columbia.edu/execed/home> (Columbia University)

MIT Sloan Executive Education

Select from various courses

Program Description:

Courses range from 2 days, @\$3,300, to month long sessions @ \$63,000

Course Name	Area of Study
Advanced Management Program	Innovation, Leadership, Managing People & Change, General Management
Applied Neuroscience: Unleashing Brain Power for You and Your People	Leadership, Managing People & Change
Building Game-Changing Organizations: Aligning Purpose, Performance, and People	Strategy, Leadership, Managing People & Change, General Management
Building, Leading, and Sustaining the Innovative Organization	Innovation, Technology Management, Strategy, Managing People & Change
Business Dynamics: MIT's Approach to Diagnosing and Solving Complex Business Problems	Systems Thinking, Business Analytics, General Management
Closing the Gap Between Strategy and Execution	Strategy, Leadership
Communication and Persuasion in the Digital Age	General Management
Creating High Velocity Organizations	Process Improvement

Developing a Leading Edge Operations Strategy	Strategy, Operations
Developing and Managing a Successful Technology and Product Strategy	Innovation, Technology Management, Strategy, Intellectual Property & Capital, Product Development & Management
Digital Marketing and Social Media Analytics	Strategy, Marketing, Business Analytics
Driving Strategic Innovation: Achieving High Performance Throughout the Value Chain	Innovation, Strategy, Marketing, General Management
Entrepreneurship Development Program	Innovation, Entrepreneurship
Essential IT for Non-IT Executives	Technology Management
Executive Program in General Management	Innovation, General Management
Fundamentals of Finance for the Technical Executive	Business Analytics, Financial Management
Global Executive Academy (multi-language)	Innovation, Technology Management, Strategy, Managing People & Change, Process Improvement, Marketing, General Management
Greater Boston Executive Program	Leadership, Managing People & Change, General Management
Implementing Improvement Strategies: Dynamic Work Design	Operations, Process Improvement
Innovation and Images: Exploring the Intersections of Leadership and Photography	Innovation, Leadership
Intelligent Organizations 4Dx (live online)	Innovation
Investment Management Theory and Practice: A CIMA® Certification Registered Education Program (online)	Financial Management
Leadership by Design: Innovation Process and Culture	Innovation, Product Development & Management
Leading Change in Complex Organizations	Leadership, Managing People & Change, General Management
Managing Complex Technical Projects	Product Development & Management
Managing Product Platforms: Delivering Variety and Realizing Synergies	Systems Thinking, Product Development & Management, Financial Management
Managing Technical Professionals and Organizations	Innovation, Managing People & Change, General Management
Marketing Innovation	Innovation, Marketing
Maximizing Your Personal Productivity: How to Become an Efficient and Effective Executive	Leadership, Managing People & Change, General Management

MIT Regional Entrepreneurship Acceleration Program	Innovation, Entrepreneurship
Negotiation for Executives	General Management
Neuroscience for Leadership	Leadership, Managing People & Change
Platform Revolution: Making Networked Markets Work for You (online)	Strategy, Entrepreneurship
Platform Strategy: Building and Thriving in a Vibrant Ecosystem	Strategy, Entrepreneurship
Pricing Strategy and Tactics 4Dx (live online)	Strategy, Marketing, Business Analytics, Product Development & Management
Revitalizing Your Digital Business Model	Technology Management, Strategy
Strategic Cost Analysis for Managers	Financial Management
Strategies for Sustainable Business	Strategy, Systems Thinking, Leadership
Strategy in a Global World	Strategy, Globalization
Supply Chain Strategy and Management	Operations, Globalization
Systematic Innovation of Products, Processes, and Services	Innovation, Product Development & Management
The Innovator's DNA: Mastering Five Skills For Disruptive Innovation	Innovation, Leadership
Transforming Your Leadership Strategy	Leadership, Managing People & Change, General Management
Understanding and Solving Complex Business Problems	Systems Thinking
Understanding Global Markets: Macroeconomics for Executives	Globalization

<http://executive.mit.edu/> (MIT Sloan Executive Education)

Executive Education Online: Select from various courses

Program Description:

\$79 per webinar, Seminars are scheduled as group events

Executive Education, Inc. is dedicated to serving the continuing education needs of corporate financial managers. Our target market is financial professionals who are not in public practice, including CPAs, CAs, CMAs, MBAs and BBAs. This group makes up as much as 50% of many accounting associations' memberships. Participants in our seminars are experienced financial managers seeking intermediate and advanced level topics.

Course List

- 10 Ways to Kill a Business: Learn from Other's Mistakes
- 15 Best Practices in Budgeting
- Creativity for Accountants
- Critical Thinking Skills for Finance and Accounting Professionals
- Getting Along at Work – Managing Different Personality Styles
- Getting Along at Work - Managing Four Generations
- Interview with Ex-Con Bank CEO Paul Allen
- Leaders Eat Last: The Characteristics of Great Leaders
- Nonprofits: Working with or Serving on Nonprofit Boards
- Strategic Skills for CFOs

<http://executiveeducationinc.com/current-catalogs/> (Executive Education Inc)

Yale School of Management: Global Leader Program

Program Description:

5 weeks \$56,000 (incl. meals and lodging)

The program will bring together a group of proven business leaders who hold C-level positions or positions within one level of the CEO—someone identified within the leadership pipeline as the next in line. They should be an integral part of the organization's decision-making team. Participants should have:

- Significant experience and demonstrated career progression and success across levels, including:
 - Executive Committee members
 - Heads of major business units
 - Heads of function for the entire organization
 - Senior executive members of core advisory or core operating groups
- A minimum of 20+ years of work experience including significant time in senior management roles.
- A strong drive, ambition and belief that being the best within the organization is not enough, they have to be one of the few in the industry, leading and shaping it for the future.

The program will make you a more effective leader with the toolkit to build a high-performing organization:

- Develop a grand strategy for your corporation by understanding the competitive forces.
- Persuade, influence, and negotiate expertly by honing your analytical and tactical abilities.
- Evaluate and improve your firm's performance through financial analysis.

- Gain perception on global business environments and financial factors, opportunities and risks in emerging markets, and policy barriers and incentives.
- Create competitive advantage and leverage operational capabilities.
- Manage crises and drive change effectively through the organization.
- Avoid pitfalls in restructuring, M&A, and turnaround situations.
- Align talent with strategy to create a more resilient and agile organization.
- Drive shareholder value and balance growth, ambition and oversight with fiduciary responsibilities and realities.

Upon completing the program, you will join the elite Association of Yale Alumni and gain exclusive access to our vast global alumni network and an array of resources that facilitate lifelong learning, growth, and success. Following are some of the key benefits:

- Membership in the Association of Yale Alumni, a network of 150,000 Yale alumni around the world.
- Membership in the Yale School of Management Alumni Association
- Inclusion in the Yale alumni directory and the SOM alumni directory
- A lifelong email forwarding address: [yourname]@aya.yale.edu
- Access to the Yale Career Network
- Access to the Yale SOM Job Board
- Invitation to CELI reunions and SOM executive education reunions
- Invitation to local SOM chapter events
- Access to selected Yale SOM career services
- Increasing access to Global Network for Advanced Management alumni events around the world
- 25% discount on all Yale SOM executive education open enrollment programs
- Free participation in faculty webinars available to SOM alumni
- Invitation to participate in the SOM Alumni Association student mentoring program
- Free access to thousands of journals through JSTOR and HeinOnline

Session Topics:

Organizational Leadership

- Organizational strategy
- Business and product portfolios
- Marketing and sales driven growth
- Competitive advantage through operations

- M&A driven growth
- Negotiations
- Restructuring and turnaround situations
- Managing uncertainty
- Innovation driven growth

Personal Leadership

- Positive strategic leadership orientation
- Authentic leadership development
- Building a support network
- Finding and benefiting from mentors
- Leadership coaching for blind spots
- Developing a personal growth roadmap

People Leadership

- Leadership styles and motivation
- Leadership communications
- Leadership in a connected world
- Crisis management
- Change management
- Leadership, ethics and corporate accountability
- Mentoring and coaching other leaders
- Developing ownership and building strong teams
- Developing a leadership pipeline
- Managing boards
- Driving shareholder value and investor relations
- Human resources and talent management

Strategic Financial Leadership

- Measuring, analyzing, and driving corporate performance
- Linking strategy to finance and the new role of a CFO
- Master the essentials of corporate financial management
- Lead in the global economy (including government and international policy, state's economic performance, national income and global business environment)

<http://som.yale.edu/programs/executive-education> (Yale school of management executive ed courses)

Harvard Business Review: Harvard Manage Mentor Online "Skill Packs"

Program Description:

Access for 1 year, 44 modules online, \$399.95

- Interactive exercises help you prepare for real-world challenges
- Flexible features let you follow your own learning path
- Downloadable tools and templates you can use right away
- Engaging audio and video
- Online forum with answers and advice from managers like you

Skill Packs:

Manage Yourself

- Career Management
- Delegating
- Goal Setting
- Managing Upward
- Meeting Management
- New Manager Transitions
- Presentation Skills
- Stress Management
- Time Management
- Writing Skills

Manage Others

- Change Management

- Coaching
- Developing Employees
- Difficult Interactions
- Dismissing an Employee
- Feedback Essentials
- Global Collaboration
- Hiring
- Laying Off Employees
- Leading & Motivating
- Performance Appraisals
- Persuading Others
- Retaining Employees
- Team Leadership
- Team Management
- Virtual Teams

Manage the Business

- Budgeting
- Business Case Development
- Business Plan Development
- Crisis Management
- Customer Focus
- Decision Making
- Diversity
- Ethics at Work
- Finance Essentials
- Innovation & Creativity
- Innovation Implementation
- Marketing Essentials
- Negotiating
- Performance Measurement
- Process Improvement
- Project Management
- Strategic Thinking

- Strategy Execution

<https://cb.hbsp.harvard.edu/cbmp/pages/home> (Harvard Business Review)

Kellogg Northwestern University -Executive Development Program

Advanced Management Program: The Global Experience

Program Description:

4 Week, \$50,000 includes 1 week out of country

Designed for the high-potential executive, Kellogg's Advanced Management Program: The Global Experience provides an immersive journey into leadership agility, driving innovation and identifying growth opportunities. This modular format provides a weeklong, unparalleled intensive week in a global market.

If you've recently assumed enterprise-level responsibilities or are poised to do so, this immersive professional development experience will help you assess the impact of your leadership skills on your organization, prepare you to create markets and drive growth while equipping you to lead your organization through the challenges and opportunities of the 21st-century global marketplace.

Unlike the "MBA refresher" offerings that require a six-to-eight week commitment, the Kellogg Advanced Management Program: The Global Experience offers an innovative schedule designed to accommodate your other executive responsibilities and ensure that you're never away from your organization or your family for more than two weeks at a time.

This is also the only program of its kind that offers an immersive experience in a major global market. This on-the-ground experience will give you nuanced insights and a deeper understanding of global markets and customers well beyond what you can gather through typical business travel or a classroom discussion.

Led by a cross-disciplinary group of senior Kellogg faculty members and enriched by meaningful interaction with other CEOs, board members and senior executives of major multinational companies, the stimulating classroom sessions are further enhanced by:

- Leadership coaching
- Simulations and experiential learning
- Topic-based workshops
- Humanities and arts-based education
- Participatory debates
- Wellness workshops

You'll leave this program with a mastery of advanced business concepts and the skills and confidence to apply them immediately in your organization.

Principal candidates for the program are experienced senior executives with a minimum of 20 years of business experience, including five to 10 years in a general management or senior functional role. A Global Advanced Management Program participant will be poised to or have just taken on enterprise-level responsibilities. These high potential executives need to "look over the horizon" and anticipate business challenges and opportunities in a global marketplace.

Federal Government leaders should consider this program as part of their ongoing professional development. The curriculum in this program supports the Executive Core Qualifications.

Develop senior executive leadership agility

- Acquire requisite leadership abilities to foster talent, prepare for the unknown and identify and articulate a compelling vision.
- Develop the insight and communication skills for collaborating across industries and geographies.
- Prepare to lead high-performance teams, effective organizations and vibrant communities.

Hone implementation strategies

- Engage in immersive action-learning experiences that synthesize program insights and strategies.
- Learn how to equip your organization for 21st-century challenges and opportunities by creating structures, developing partnerships and building connections within a broader ecosystem.

Deepen your understanding of the global market

- Engage in an unparalleled international learning experience in such markets as China and Brazil.
- Connect with top executives and thought leaders; gain perspectives on geopolitical, cross-cultural, strategic and operational issues.
- Equip your organization to thrive in the global marketplace.

<http://www.kellogg.northwestern.edu/executive-education/individual-programs/executive-programs.aspx?gclid=Cj0KEQjw17i7BRC7toz5g5DM0tsBEiQAlt7nLI4H11uAqx7rLvck1JMkZPpD5csG7QGtZjqZgDZhHi8aAs8u8P8HAQ> (Kellogg Northwestern Executive education)

University of Pennsylvania, Wharton School: CEO Academy

Program Description:

2 days, \$20,000

Focusing on the most critical leadership issues facing new and established CEOs, *CEO Academy*® brings together the world's most well-respected chief executives to share what worked while leading their companies through major change and what they would have done differently. Attendees leave with actionable insights from CEOs in the trenches, as well as a richer perspective on macroeconomic trends, shareholder engagement, and strategic leadership.

Designed for both new and experienced chief executive officers, this program features more than 15 current and former CEOs from major companies as speakers. They will focus on the most critical leadership issues relevant to new and established CEOs.

Highlights and benefits

- Enhance your leadership and strategic decision-making skills
- Gain new insight on some of the major issues affecting CEO decision-making today
- Connect with peers in a dynamic setting
- Hear from veteran CEOs at critical moments leading their organizations and what they learned

Session Topics:

- Why CEO Continuous Improvement is Critical
- Case Studies of Successful CEOs
- Why Capital Allocation is Strategy
- Ethics and Integrity: Setting the Tone at the Top
- The Discipline of Getting Things Done
- Continue to Innovate or Die
- Placing Your Bets around the World
- How Best to Assess your Team
- The Changing Landscape of Shareholder Engagement
- What You Need to Know about ALL Media
- Boards: When to Take Charge, When to Partner and When to Stay out of the Way
- Transform Your Company Before Others Do
- The Art of Delegation

Executive Development Program - Senior Management*Program Description:*

2 weeks, \$26,000

Wharton's Executive Development Program (EDP) prepares fast-track leaders to move from mastery of one focused area to success in a broader role, priming them for greater leadership responsibility in large companies and organizations.

During 2 intense, transformative weeks, participants will expand their business acumen in key areas while benefiting from the expertise of global participants from a wide variety of industries, functional areas, cultures and geographical regions.

The Executive Development Program is designed to increase the business skills and leadership capabilities of managers who lead key divisions of their companies and aspire to be among top leadership in their organizations. EDP takes a multidimensional approach to learning, combining lectures, small/large group discussion, case study, role playing, campus networking opportunities, and a strategy simulation to provide new insights and give you opportunities to apply them. During the two-week program you will:

- Advance your strategic decision-making capabilities to think faster and more creatively about current competitive strategies and solutions
- Deepen understanding of organizational dynamics to improve the design and implementation of new initiatives and avoid destructive conflicts
- Build capabilities for leading cross-border teams across functions and countries
- Develop knowledge in core areas of business, including finance, marketing, management, and strategy based on current research and best practice
- Put your knowledge and skills to the test in a custom strategy simulation that incorporates program content, sustainability issues, and teamwork
- Develop a global network of peers and experts
- Create a plan to implement the lessons of EDP when you return to work

A team of faculty and experts, from diverse business disciplines, provide in-depth knowledge in core business areas including finance, strategy, leadership, marketing, organizational dynamics, and

globalization. Class sessions are designed to capture the years of experience in the room. Learning groups provide opportunities for exploring issues across business and cultural boundaries, and social activities promote a spirited camaraderie that leads to deep and lasting connections.

Session Topics:

- Valuing Strategic Decisions
- Operations Management and Link to Financial
- Marketing Strategy
- Managing Global Policy Risks
- Creating and Sustaining a Competitive Advantage
- The Power of Corporate Culture and How to Harness It
- Mergers & Acquisitions
- Executive Negotiation Workshop
- Leadership and Integrity
- Team Dynamics
- Leading Through Emotional Intelligence

Other Wharton Programs-

Senior Leadership

- Advanced Management Program
- Boards that Lead: Corporate Governance that Builds Value
- CEIBS/Wharton Joint Programme: Corporate Governance and Board of Directors
- Global CEO Program: A Transformational Journey
- Global Resilient Leadership
- Global Strategic Leadership
- CEO Connection: Effective Corporate Boards for Mid-Market Companies
- General Management Program
- The CFO: Becoming a Strategic Partner
- Wharton Fellows: Master Classes and Networking for Senior Executives

Team & Individual Leadership

- Creating and Leading High-Performing Teams
- High-Potential Leaders: Accelerating Your Impact
- Leading and Managing People
- Leading Organizational Change
- The Leadership Edge: Strategies for the New Leader
- The Leadership Journey: Reimagine Your Leadership
- The Strategic Decision-Making Mindset
- Women's Executive Leadership: Business Strategies for Success

Negotiation & Persuasion

- Executive Negotiation Workshop: Bargaining for Advantage®
- Strategic Persuasion Workshop: The Art and Science of Selling Ideas

Specialized Leadership

- Executive Sports Management Program
- Penn Executive Veterinary Leadership Program: Making an Impact as a Global Health Leader
- Physician Leadership Academy

- Wharton Nursing Leaders Program

<http://executiveeducation.wharton.upenn.edu/> (Wharton School, U of Penn)

VISTAGE: Chief Executive Leadership Program

Program Description:

Cost unknown

Connect with up to 16 executive peers from a diverse range of noncompetitive businesses and backgrounds in this one of a kind peer advisory and executive leadership development program.

Program Features Include:

- Monthly problem-solving peer group meetings consisting of CEOs, executives, presidents or business owners
- Professional facilitating by a seasoned Vistage Chair
- Monthly, personal executive coaching sessions
- Up to 8 training workshops a year led by a Vistage expert speaker
- Access to an online best practices library, member conferences and a network of more than 21,000 global business leaders

Recharge Your Thinking

New approaches, forward-thinking, and fresh perspectives keep your business on the front lines of growth and development. Be inspired to challenge conventional thinking, confront problems head-on and put groundbreaking ideas into action with confidence.

Learn from Fellow CEOs

Get feedback on your toughest decisions from the chief CEO's most effective sounding board — fellow executives who have met and overcome the same challenges. The Chief Executive Program answers your questions and, more importantly, questions your answers until you're certain you've got it right.

Count on Trusted, Confidential Advice

Who do you turn to for honest, straightforward advice with no hidden agenda? Vistage members and business coaches help you determine what will and won't work. They help you dig deeper to find new opportunities, and they hold you accountable for taking action. Vistage private business advisory boards help you build that circle of trusted advisors whose only agenda is to help you succeed.

Seize Opportunities for Results Now

The Vistage Chief Executive program is about continuously developing your leadership skills and driving real results in real time. No theoretical business school scenarios — instead, you get continuous, accelerated, practical executive coaching and peer perspective that you can immediately put into practice.

Key Executive Program**Program Description:**

Cost unknown

Connect with up to 16 executive peers from a diverse range of businesses and backgrounds in your Key Executive Program for challenging discussions, fresh perspectives on the key executive role, and strategies to create closer alignment with your CEO.

Program Benefits include:

- Monthly, executive peer group meetings led by a professional Vistage Chair
- Up to 8 annual small-group workshops led by Vistage expert speakers
- Connectivity resources, including an online best practices library, webinars and member conferences
- Access to the Vistage global community of more than 21,000 business leaders

Recharge Your Thinking

Diverse points of view and innovative approaches enable key executives to take a more prominent leadership position and help drive results. You'll literally redefine your role as a highly confident leader who fearlessly steps up to the plate and makes better decisions and achieves better results. You'll gain the insight and the authority to put your ideas into action.

Learn from Fellow Executives

Get feedback on your toughest decisions from fellow executives who have met and overcome the same challenges. The Key Program provides you with the information and confidence to move beyond day-to-day responsibilities and focus on being a leader.

Count on Trusted, Confidential Advice

Who do you turn to for objective advice with no hidden agenda? Vistage members and business coaches give you solid feedback, help you see new opportunities, and hold you accountable for taking action. The Key Program builds that circle of trusted advisors whose only agenda is helping you succeed.

Seize Opportunities for Results Now

Now more than ever, CEOs are looking to their key executives to help drive results. This business executive program gives you continuous, accelerated, practical perspectives and leadership concepts that you can put into practice immediately.

<http://www.vistage.com> (Vistage)

SAGE Executive Group*Membership organization – Peer Groups**Program Description:*

Cost unknown

The CEO rarely has co-workers whom they can open up to or who don't have a personal agenda that tends to filter what really should be said. C-level executives face many of the same challenges, and as a result they need a place to go where they can vet their ideas, get mentoring and get unfiltered feedback in a confidential, noncompetitive forum of their peers.

Sage was born of the vision that decision-makers should be able to come together with like-minded professionals and collaborate, learn from each other and tackle the most pressing issues. As a result, you can achieve higher levels of success - in your business and in all aspects of your life.

Sage was founded by individuals who have over 45 years of collective experience with CEO peer advisory groups, serving in executive and leadership positions with some of the best-known organizations in this arena and as members of those same organizations. As a result, we know what it takes to put together an effective and value-driven member experience. We understand just how much can be gained when CEOs and leaders collaborate. You will take away invaluable knowledge from the hands-on experiences of other top minds. With this knowledge in hand, your business sense and success will be taken to the next level.

Our goal is not to be the biggest organization in the CEO peer advisory space; it's to be the best. We believe in quality over quantity at Sage Executive Group. Groups are limited to 12 members to ensure there's plenty of knowledge and experience among the group while providing opportunities for each member to get mentoring and have his or her issues addressed. Our facilitators offer leadership and knowledge that will make it possible to gain traction on even your most serious business challenges or roadblocks.

Membership in Sage puts you in a *peer advisory group* of up to 12 like-minded business executives from diverse industries, each driven to become better leaders and achieve greater success and significance. The Sage network encompasses: CEOs, founders and presidents; Chief Financial Officers and Chief Operating Officers; and sales and marketing leaders who share best practices, solve problems and exchange invaluable peer feedback. Each group also has a member who leads a not-for-profit organization in the local area, giving an additional perspective and helping leaders of organizations vital to our communities achieve better results.

Interested in becoming a member of one of our executive peer advisory groups? You'll find our minimum qualifications below. In an effort to engineer the best peer groups, Sage is committed to making sure that we are the right fit for you and you are the right fit for us. Prior to being accepted to a peer advisory group, a Sage representative will meet with you.

Sage Peer Groups:

- **CEO:** Must be the CEO, founder, president or partner of a company with at least \$4 million in annual sales and be experienced, successful and like-minded in striving for growth and excellence in both business and personal life. Meet each month for five hours with a group of 12 fellow chief executives, facilitated by a seasoned business leader with CEO experience in recruiting, hiring, managing and motivating.

- **Ascent CEO:** Members, like chief executives in the pioneering Sage CEO groups, meet monthly for five hours to learn from each other and tackle their most pressing issues. Their companies have sales from \$1 million through \$4 million.
- **Key Executive:** Members are C-level executives who interact with peers to expand their leadership expertise. Titles include COO, CFO, General Manager or Chief Legal Counsel. They meet each month for 2 1/2 hours to explore challenges ranging from creating and following a business plan to developing financial metrics.
- **Sales Leadership:** Sales manager or vice president with responsibility for company sales/marketing.
- **Marketing/Public relations/Advertising/Digital:** CEO, founder, partner or principle of a creative agency.
- **In-house Marketing Executive:** Active in defining and/or executing marketing plans/strategy
- **Facility Manager:** Responsible for key business services. Work with other facility management peers to learn, grow and share best practices.

The monthly group meetings are interactive and dynamic, giving a time out from unrelenting daily distractions to solve critical issues impacting your business and personal life, ultimately improving your leadership effectiveness and bottom line results.

When you join the Sage community, you will become part of an experience that is designed to help you achieve greater success and significance. You can expect:

- Members and chairmen who have been carefully selected by Sage. All members are vetted before acceptance to a group and are committed to growth, personally and professionally.
- Groups of no more than 12 members, so you have ample time and enough experienced leaders to get questions answered and answers questioned.
- A qualified paid facilitator, who serves as chairman of the group, providing guidance and lending relevant knowledge and experience to the discussions. All Sage chairmen have been successful business leaders.
- Monthly peer group meetings that get you the answers you need in an effective and efficient format that makes the most of your valuable time.
- Monthly individual meetings with your Sage chairman to help keep you on track and focused and to provide practical and relevant advice.
- Speakers with real-world experience, relevant insight and actionable advice.
- A strictly enforced confidentiality policy.

<http://www.sageexecutivegroup.com/blog/> (SAGE)