LEADERSHIP APOCALYPSE:
Why You Need a Plan

Agenda

Session One

- The Why
- Traditional Leadership Development
- Transformative Leadership Development
- Future Proofing Your Firm Through Strategic Succession Planning
- Beach Side Chat
- Q&A

Agenda

Session Two

- Strategic Positioning for Long-Term Success and Resilience
  - Small & Large Group Brainstorming
  - Q & A

Enhancing Collaboration and Connectedness

Achieving Work-Life Harmony

Embracing Digital Transformation

Rapidly Changing World

Sustainability and Resiliency

Increasing Emotional Intelligence

Understanding Generational Dynamics

Purposeful and Intentional Leadership

The Why

Aggressive Recruitment

From outside the industry too!

Greatest Asset & Challenge

Succession Planning Importance:
86% of Firms

Effective Succession Planning:
14% of Firms

*Deloitte

Impact of Not Investing in Leadership Development & Succession Planning

Leadership Gaps

Employee Morale

Negative Impact on Company Culture

Increased Turnover

Decreased Competitive Edge

Loss of Institutional Knowledge

Operational Disruptions

Cost Implications

Strategic Misalignment

Client Relationships

Lack of Planning

1 2 3 4 5 6 7 8 9 10

Your Cost

How much total value is lost by firms in the US _each year_?

$1 Trillion

How much could your valuation increase?

20%+

Traditional Leadership Advancement

Leadership Development
Over the Generations

Traditional Leadership (Pre 1980s)

Hierarchical Structures: Command-and-control models

Skill Focus: Technical expertise and operational efficiency

Leadership Development: Mostly ad-hoc and technical

Modern Leadership (1980s-2000s)

Flattening Hierarchies: Emphasis on teamwork and collaboration

Skill Focus: Soft skills and emotional intelligence

Leadership Development: Some formal training programs and workshops

Contemporary Leadership (2010s)

Flexible Structures: Cross-functional teams with some "business-trained" leaders

Skill Focus: Inclusivity and consensus building

Leadership Development: More formal training programs and workshops

Intentional Leadership (2020-Present)

Agile Structures: Proactive, adaptive, and inclusive

Skill Focus: Strategic and forward thinking, growth mindset, innovation, rapid decision-making, digital literacy & AI

Leadership Development: Custom programs with group and personalized development plans

One Size
Does Not Fit All

Do you lead like whom you succeeded?

Should you?

Will your successor?

Should they?

Transformative
Leadership
Development

"People buy into the leader before they buy into the vision."

~ John Maxwell~

Strengths &
Areas for Growth:
Individualization

Goals of Custom Transformative Leadership Development Programs

Align with Organizational Goals

Strategic Fit:
Leadership capabilities are in sync with the organization's strategic goals and objectives

Cultural Alignment:
Leaders who embody the organization's values and culture

Address Skill Gaps

Customized Training:
Programs to address specific needs and gaps of individuals and the firm

Future-Proofing:
Leaders prepared for emerging trends and future challenges

Enhance Employee Engagement and Retention

Growth Opportunities:
Commitment to leadership and employee development

Talent Retention:
Firms invested in the future of leaders, future leaders, and the company

Leadership Characteristics

What are your firm's needs to further its success and ensure resiliency?

What leadership characteristics promote your firm's culture now and in the future?

How does this align with your Core Values?

Authentic Alignment™

How will you gain buy-in from your leaders and future leaders?

How will you ensure input from those with different perspectives?

What does it mean to be a successful leader in your firm now and in the future?

Authentic Alignment™ Leadership Models

Purpose-Driven	Facilitative	Charismatic
Transformational	Many more...	Servant
Combination of Two+	Visionary	Adaptive

Authentic Alignment™

Characteristics

- Empowered & Empowering
- Inspired & Inspiring
- Determined
- Results-Driven
- Curiosity

Models

- Transformational
- Servant
- Adaptive

Transformative Leadership Program Key Components

Holistic, Comprehensive & Tailored

- Focus on skill-building and aligning personal growth with organizational core values, mission, and vision
- Incorporation of innovative learning and development methodologies

Customized & Expert Assessments

- Expert assessments (Core Strengths, LE306, etc.)
- Change Style Indicator™ (CSI) Assessment
- Custom 360 Assessments based on the culture and goals of the program and firm
- Beginning and end of program to measure growth individual and firm growth and ROI

Transformative Leadership Program Key Components

Strategic Individual Development Plans

- Creation of personalized development plans that align with strategic priorities and guide daily decision-making

Personalized Executive Coaching

- Individual executive coaching sessions tailored to each participant's and the firm's needs throughout the program

Transformative Leadership Program Key Components
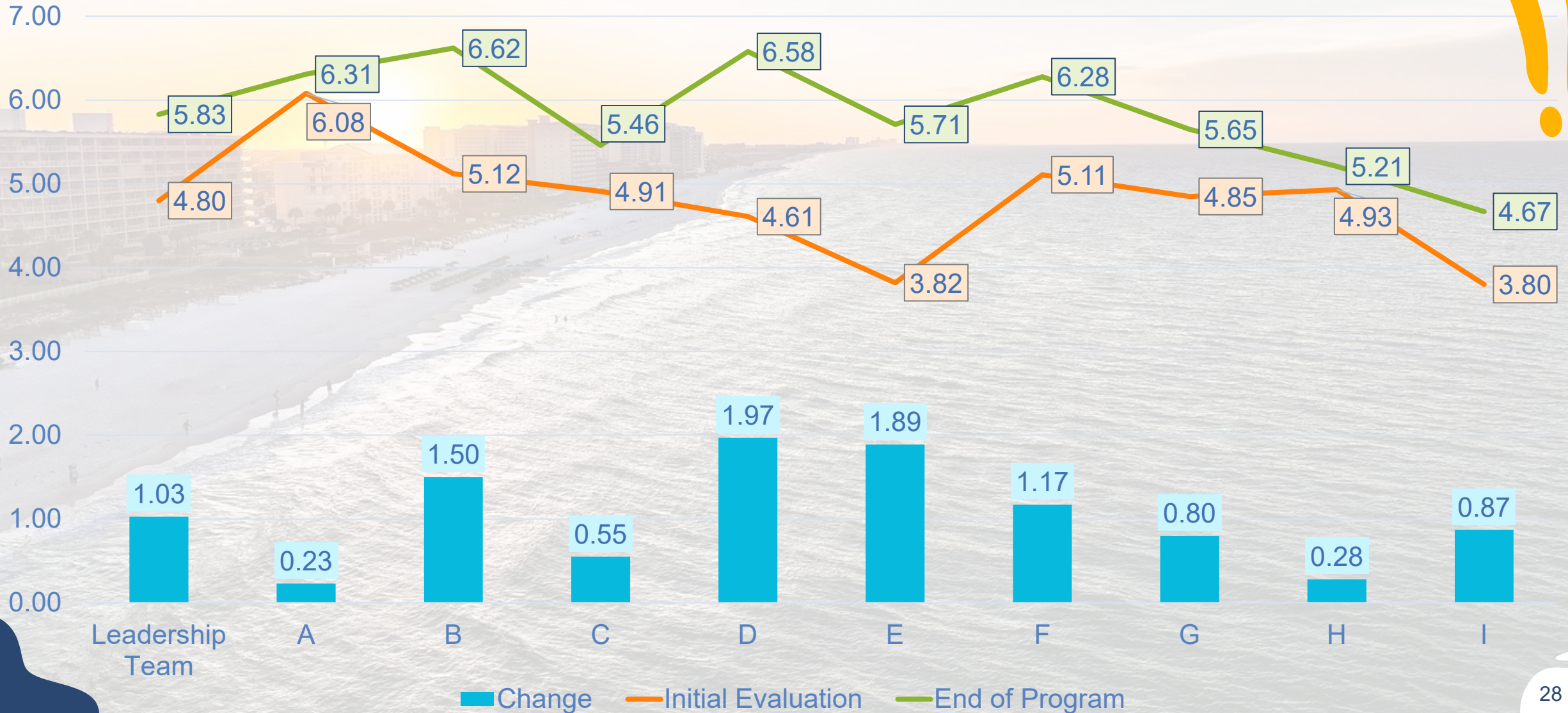
Experiential Learning and Real-World Application

- Curated list of books, articles, videos, and podcasts with custom created learning activities (individual and small and large groups)
- Focus on tackling real-world challenges through experiential learning during in-person workshops and virtual shared experiences
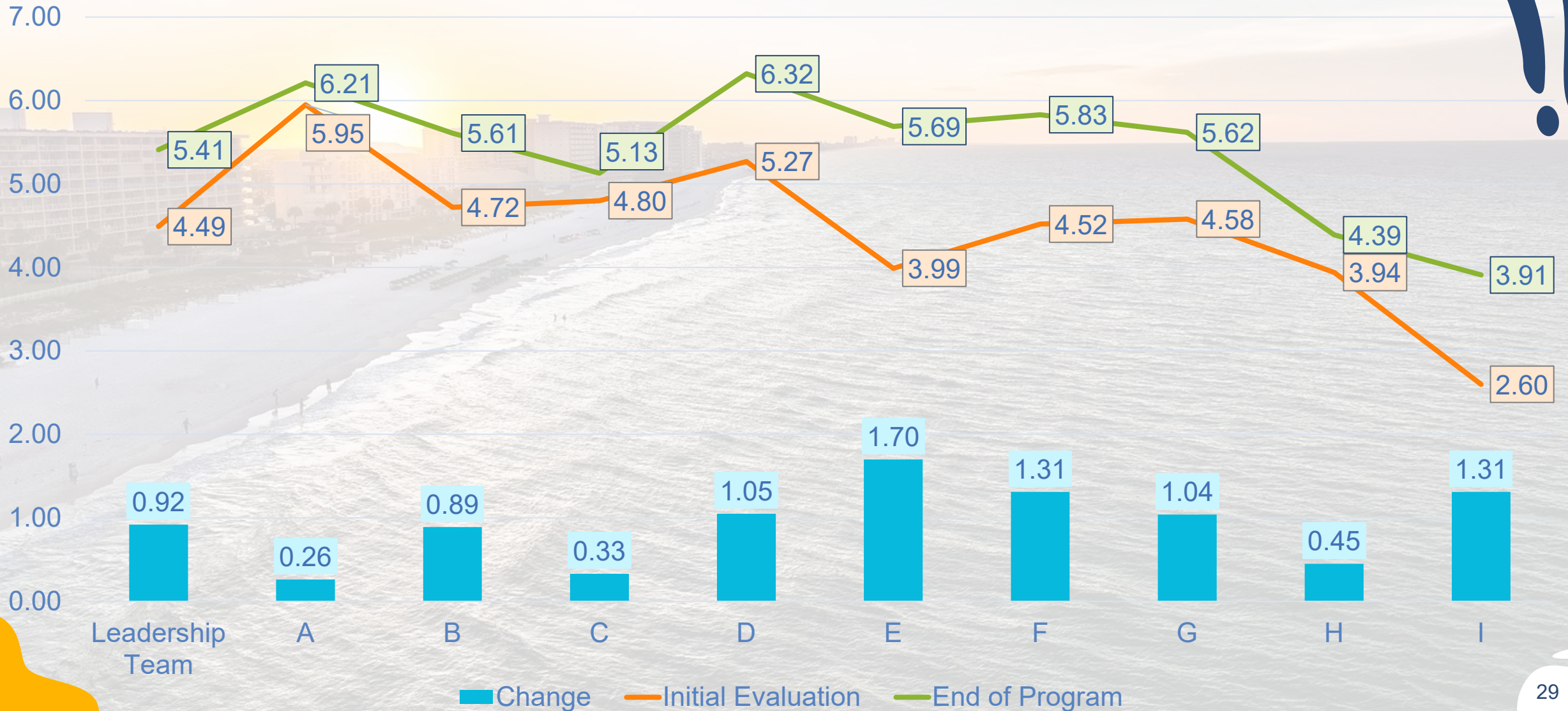
Future Outlook & Strategic Growth Mindset

- Ensure broad range of perspectives in leadership roles
- Embrace digital transformation, new business models, data monetization, and a rapidly changing world
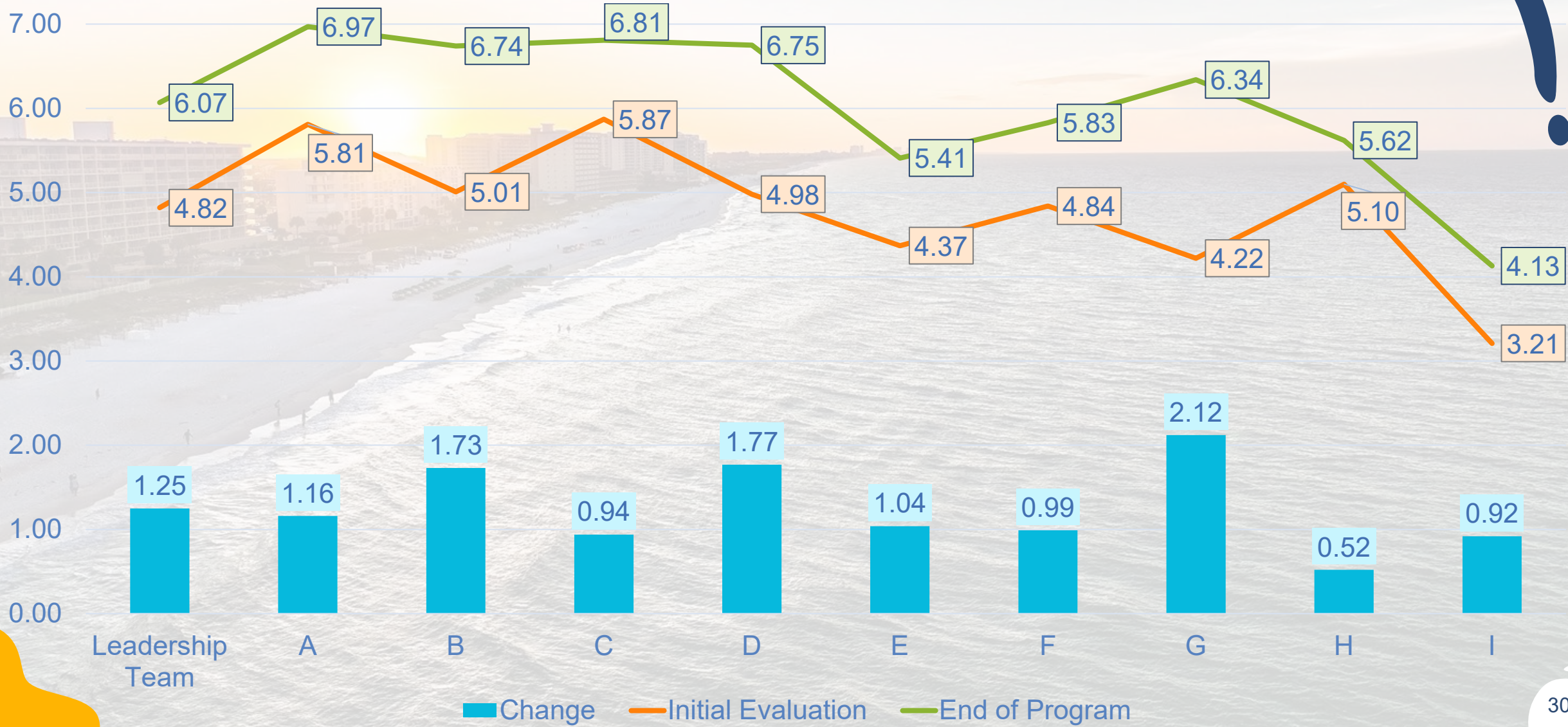
Participant Growth: Visualizing the Future

End of Program line: 5.83, 6.31, 6.62, 5.46, 6.58, 5.71, 6.28, 5.65, 5.21, 4.67

Initial Evaluation line: 4.80, 6.08, 5.12, 4.91, 4.61, 3.82, 5.11, 4.85, 4.93, 3.80

Change bars: Leadership Team 1.03, A 0.23, B 1.50, C 0.55, D 1.97, E 1.89, F 1.17, G 0.80, H 0.28, I 0.87

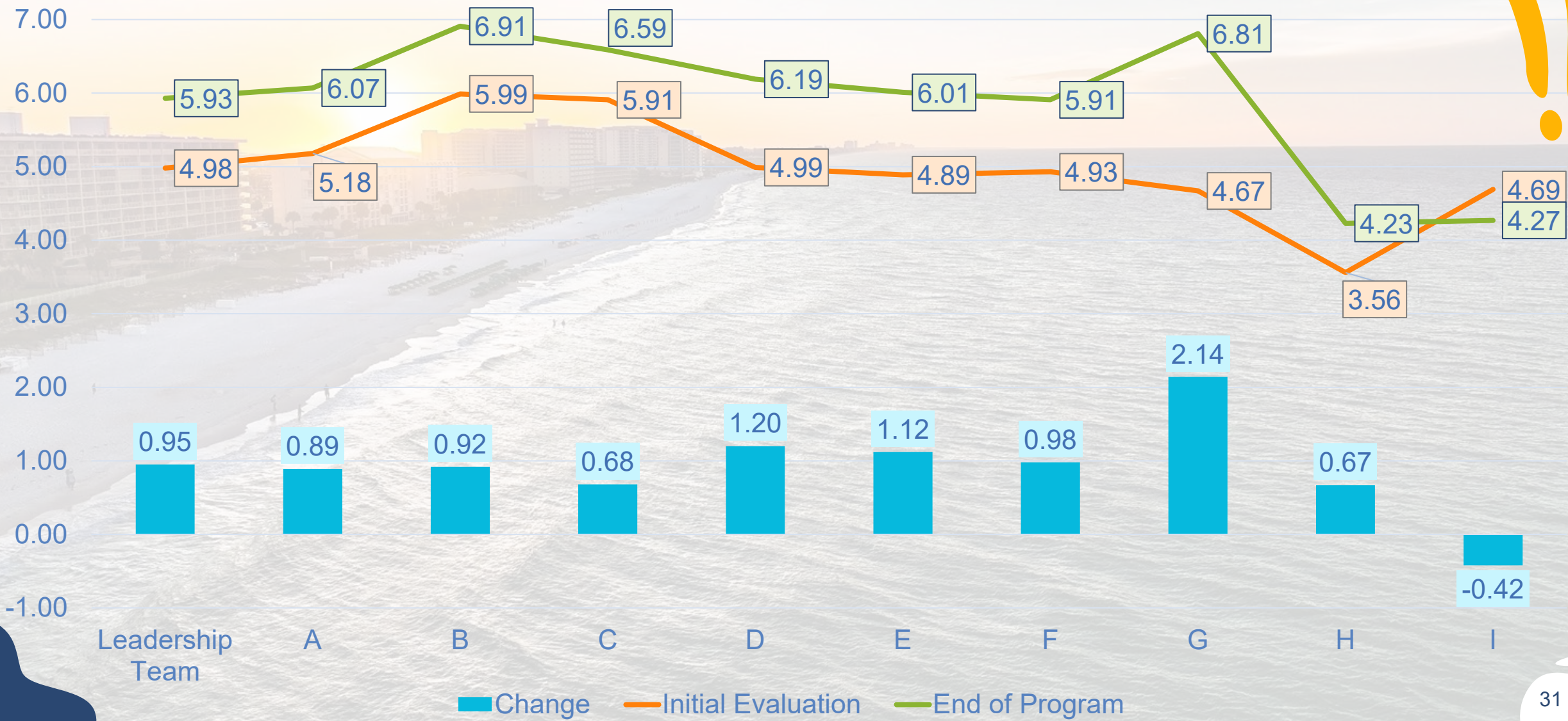Legend: Change, Initial Evaluation, End of Program

28

Participant Growth: Delegation

Participant Growth:
Communication with Direct Reports

Participant Growth:
Communication with Supervisor

	Leadership Team	A	B	C	D	E	F	G	H	I
Initial Evaluation	4.98	5.18	5.99	5.91	4.99	4.89	4.93	4.67	3.56	4.69
End of Program	5.93	6.07	6.91	6.59	6.19	6.01	5.91	6.81	4.23	4.27
Change	0.95	0.89	0.92	0.68	1.20	1.12	0.98	2.14	0.67	-0.42

Legend: Change, Initial Evaluation, End of Program

Participant Growth: Total Growth
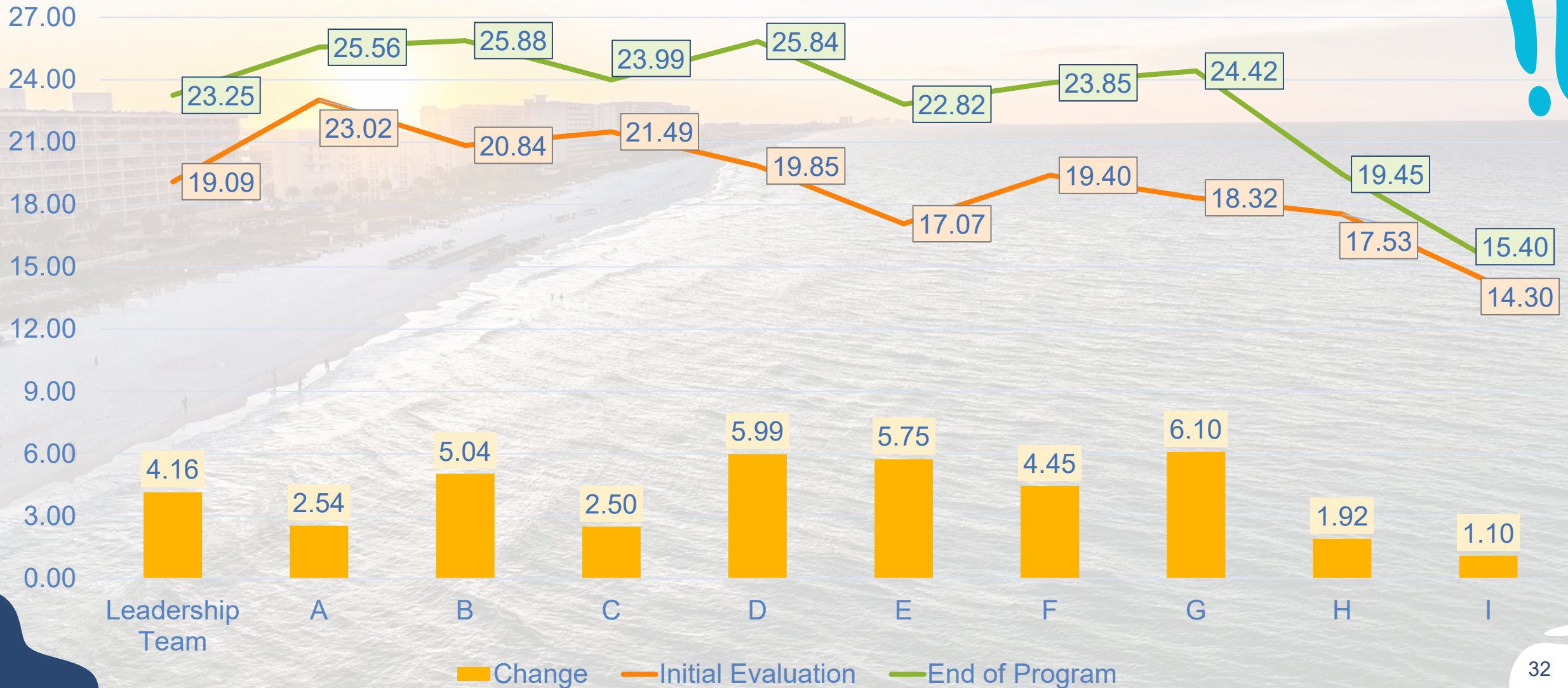
Participant Scores

Before the Program	Leadership Team	A	B	C	D	E	F	G	H	I
Delegation	4.49	5.95	4.72	4.80	5.27	3.99	4.52	4.58	3.94	2.60
Visualizing the Future	4.80	6.08	5.12	4.91	4.61	3.82	5.11	4.85	4.93	3.80
Communication with Direct Reports	4.82	5.81	5.01	5.87	4.98	4.37	4.84	4.22	5.10	3.21
Communication with Supervisor	4.98	5.18	5.99	5.91	4.99	4.89	4.93	4.67	3.56	4.69
Average	4.77	5.76	5.21	5.37	4.96	4.27	4.85	4.58	4.38	3.58

7

4

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Participant Scores

After the Program	Leadership Team	A	B	C	D	E	F	G	H	I
Delegation	5.41	6.21	5.61	5.13	6.32	5.69	5.83	5.62	4.39	3.91
Visualizing the Future	5.83	6.31	6.62	5.46	6.58	5.71	6.28	5.65	5.21	4.67
Communication with Direct Reports	6.07	6.97	6.74	6.81	6.75	5.41	5.83	6.34	5.62	4.13
Communication with Supervisor	5.89	6.07	6.91	6.59	6.19	6.01	5.91	6.81	4.23	4.27
Average	5.80	6.39	6.47	6.00	6.46	5.71	5.96	6.11	4.86	4.25

7

4

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Future Proofing Your Firm Through Strategic Succession Planning

Succession Planning
Over the Generations

1900s-1950s

Focus on Seniority:
Leadership roles were often filled based on tenure and seniority within the company

Limited Scope:
Succession planning was typically limited to top executive positions

Informal Processes:
Process was largely informal, with decisions made by a small group of senior leaders

1960s-1990s

Introduction of Formal Programs:
Companies began developing more formal succession planning programs

Identification of High-Potentials:
Focus shifted towards identifying high-potential leaders

Training and Development:
Training became encouraged

2010s-Present

Competency-Based Approach:
Skills and attributes required for some leadership roles are identified

Broader Inclusion:
Expansion of succession planning beyond top executives was encouraged

Technology Integration:
Incorporation of tech to help manage planning is growing

Goals of Succession Planning:
Future Proofing Your Firm

Foster Culture You Have Now & Need in the Future

Internal Mobility: Encourage the development and promotion of internal candidates

Employee Morale: Boost morale by providing clear career pathways and opportunities for advancement

Ensure the Right Fit: Take the time to grow and find (internal and external) the best leaders

Ensure Resiliency

Leadership Pipeline: Maintain a steady flow of prepared leaders ready to step into key roles

Risk Mitigation: Minimize disruption caused by sudden leadership changes or departures

Support Long-Term Growth

Sustained Success: Ensure the organization has the leadership strength to drive long-term growth and success

Strategic Agility: Enhance the organization's ability to adapt to external forces and market changes with capable leaders at the helm

Right People Right Roles

Aligning Leadership Development & Succession Planning

Leadership Evaluation & Talent Identification	**Leadership Evaluation:** Objectively assess the depth and breadth of leaders based on program growth **High-Potential Leaders:** Identify leaders who have shown significant growth and readiness for higher roles
Future Role Alignment	**Succession Mapping:** Map leaders to potential future roles based on their skills, competencies, and career aspirations **Readiness Assessment:** Evaluate the readiness of leaders for specific roles, their potential successors, and identify gaps
Targeted Development	**Individual Development Plans (IDPs):** Create tailored development plans for high-potential leaders to prepare them for future roles **Stretch Assignments:** Provide challenging assignments that align with future role requirements
Mentorship & Executive Coaching	**Senior Leaders as Mentors:** Pair high-potential leaders with senior leaders for mentorship and guidance **Executive Coaching:** Offer executive coaching to refine and enhance leadership capabilities
Continued Evaluation & Modifications of Succession Plan	**Performance Tracking:** Continuously track the performance and development of leaders **Succession Plan Review:** Regularly review and adjust the succession plan based on evolving organizational needs and leader readiness

Future Proofing People-Centric Succession Planning

Objective

- Data-Driven
- 360 Feedback
- Other Assessments

Subjective

- Cultural Fit
- Potential Focused
- Ideal Leadership Characteristics & Models
- Results/Action-Driven

Proactive & Adaptive

- Firm Goals & Vision
- Future Focused
- Growth Mindset
- Strategic Ability & Agility

Future Proofing People-Centric
Succession Planning

Objective

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After the Program	Leadership Team	A	B	C	D
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Future Proofing People-Centric Succession Planning

Subjective

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Authentic Alignment™

Future Proofing People-Centric Succession Planning

Proactive & Adaptive

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- Growth Mindset
- Strategic Ability & Agility

The Why

Business Results

Evolved from 2nd generation closely held family-owned firm to 3rd generation of ownership

Vastly increased ownership opportunities

Flat organization chart to a matrix organization

Grew four times+ in people and revenue while increasing NPS & eNPS 11%+

Increased profitability almost 100%

Created two subscription revenue products

Formed a software as a service firm subsidiary

Expanded into three new markets and five new offices

Added additional layer of leadership to work on business instead of in

Prevent a
Leadership Apocalypse

Ensure Your Legacy & Your Firm is Resilient

Beachside Chat

SAIN ASSOCIATES

Jim Meads
President / CEO

Becky White
Sr. Principal / COO

Questions

#futureproof

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Agenda

Session Two

- Strategic Positioning for Long-Term Success and Resilience
  - Small & Large Group Brainstorming
  - Q & A

Brainstorming Session

- **Part One: ~5 MIN**
  - Read all questions individually
  - Write down two ideas for each question
- **Part Two (2X)**
  - **15 MIN:** Form small group and discuss two questions
  - **5 MIN:** Rejoin large group for more discussion

Questions

#futureproof

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