

Leadership, performance, results.

A 2019 look-back on learnings
from the Vistage Executive Summit.

Dear members,

It is said that to be a success, you should surround yourself with successful people. No one knows this better than the members of our Vistage community. To be a member is to continually inspire — and be inspired by — successful people. Nowhere is this more evident than at a Vistage Executive Summit.

This year, we gathered in cities all over the country. We got out of the weeds for a day to learn from the achievements of regional peers and the companies they lead. We connected with those who have met challenges, and were moved by those who persevere.

We created this book so you may get to know some of the high-integrity leaders who made the 2019 Vistage Executive Summit experiences so valuable.

You will notice the e-book is organized by theme and is a gold mine of impactful stories from fellow business leaders. It demonstrates that our community is the premier way truly effective leaders improve, and drive decisions and results. Simply put, Vistage is how leaders learn.

Whether you read from cover to cover, or parse each theme as you draw your own roadmap for excellence, I know you will come away galvanized and refreshed.

I am proud of what we have accomplished through our unique Vistage Executive Summit experiences. My hope is that the connections you've made, and experiences you've shared are a launch pad for a productive and prosperous 2020. I look forward to seeing you in 2020 at a Vistage Executive Summit.

Best,

Sam Reese

Chief Executive Officer
Vistage Worldwide, Inc.

“

*To be a Vistage member
is to continually inspire
— and be inspired by —
successful people.
Nowhere is this more
evident than at a Vistage
Executive Summit.”*

Sam Reese

Chief Executive Officer
Vistage Worldwide, Inc.

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Snapshot

The Vistage Member Excellence Awards

One of Vistage's greatest strengths is the caliber of its members. You make high-impact decisions. You go above and beyond to deliver results. You are committed to bold leadership in your group, your company and your community. The Member Excellence Awards celebrate those that go even further, with winners and nominees honored at the Vistage Executive Summit.



Leadership Award

Day in, day out — this person makes a difference in their company, their Vistage group, their community.

**Nominees a member of Vistage a minimum of one year at time of nomination.*



Impact Award

The progress of Vistage's newest members is awe-inspiring. In a short span of time, this member has had lasting impact on their company, Vistage group and community.

**Nominees a member of Vistage 1-3 years at time of nomination.*



Lifetime Achievement Award

A track record of bold decisions. A spirit of continued growth and learning. Wisdom shared freely. The embodiment of Vistage values.

**Nominees a member of Vistage 10+ years at time of nomination.*

Snapshot

The Vistage Executive Summit



The Vistage Executive Summit is a synergy of the resources Vistage members leverage all year. This powerful event brings the Vistage community together for a day of learning, inspiration and connection. From carefully selected speakers, to thoughtful breakout sessions. It's an opportunity to step away from the minutiae of the day-to-day to work on your business, rather than just in it.

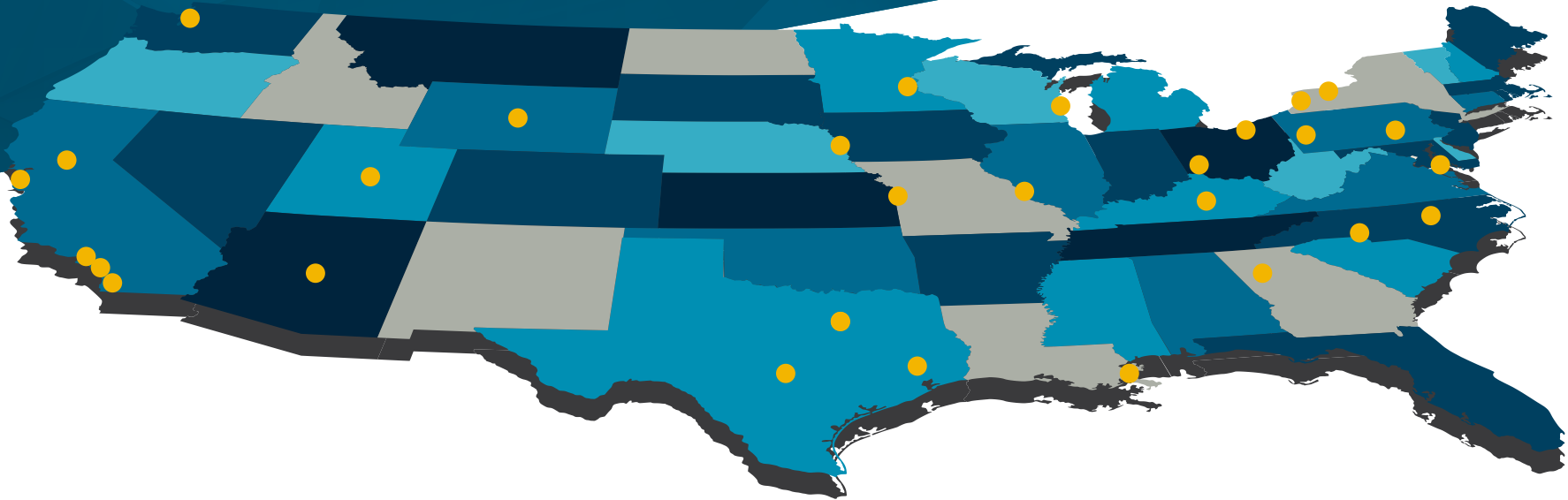
Vistage member CEOs do things differently. Gain trusted perspectives and new ideas to bring back to your team. Pioneer the change necessary to stay relevant. Make better-informed decisions.

*Realize what you
are capable of.*

2019 Vistage Executive Summit

From coast to coast

Each Vistage Executive Summit featured a panel of Vistage Member Excellence Award winners sharing their journeys and best practices. These inspiring accounts fill this e-book's pages.



- Arizona
- Atlanta
- Buffalo
- Charlotte
- Cincinnati
- Cleveland
- Colorado
- Dallas
- DMV (DC)
- Houston
- Kansas City
- Kentucky
- Los Angeles
- Milwaukee
- Minneapolis
- New Orleans
- Omaha
- Orange County
- Pittsburgh
- Rochester
- Sacramento
- San Antonio
- San Diego
- San Francisco/SV
- Seattle
- S. Central PA
- St. Louis
- Triangle/Raleigh
- Utah
- [Coming to a city near you in 2020!](#)

Deep dive

A look-back on learnings from the 2019 Vistage Executive Summit

Get inspired by Vistage Member Excellence Award winners and Vistage Executive Summit speakers and sponsors.

Explore a year of significant real-world lessons from those who lived them.





Empowering others

“

Individually, we are one drop. Together, we are an ocean.”

– Ryūnosuke Satoro



Gordon Bernhardt

Leadership Award

President/CEO | Bernhardt Wealth Management, Inc.
Chair: Peter Schwartz | Member since 2009 | CE 3643

“What do I want to do with my life?” Energized by planning for the next generation of leaders, Gordon Bernhardt had an aha moment that spurred his company’s most significant growth. He realized, to create a company that would outlast his own tenure, he needed a team approach in the form of a group ownership structure. “We would not have achieved such growth if I hadn’t had that shift,” he said.

Gordon empowered his team to make key decisions and contribute ideas. “It’s more effective having the team’s influence on the crafting of process and product.”

Other aha moments:

1. Find a mentor.
2. You don’t need to be involved in everything. Trust your team.
3. The greatest rewards come from living a full life.

 **HEAR MORE**



Robert Berntson

Leadership Award

CEO | Berntson Porter & Company PLLC
Chair: Tom Zahniser | Member since 2005 | CE 0193

Robert Berntson built his accounting firm on the premise of treating people well, regardless of rank or role. On the heels of the 2008 recession — and in an industry known for turnover — Robert aggressively innovated around workplace culture and customer relations, earning Berntson Porter national recognition as a top place to work and top-grossing firm.

Robert’s leadership lessons:

1. Winning is a transitory state.
2. Listen to people. Always be learning.
3. Understand how business works, but don’t reinvent the wheel. Find the right people to do the work in order to grow.
4. Be aware of industry changes to gain market share and keep people.
5. Don’t come to a conclusion without gathering all the information.



Rebecca Clyde

Leadership Award

Founder/Owner | Ideas Collide Inc.

Chair: Michael Denning | Member since 2014 | CE 4400

"I want people to do business with us, because of EVERY person in the company." Rebecca Clyde has inspired greatness for her current teams, and for the next generation of women in tech.

To implement Rebecca's people-first approach:

1. Ask: Do you have everything you need to be successful?
2. Take a genuine interest in your employees as human beings.
3. Consider leadership an "elite sport." Have a coach. Train daily. Always work to improve your game.

Rebecca founded digital marketing firm Ideas Collide when she was just 30 years old. She did so determined to empower people to do their best work, a mission that carries over to her co-founding of Phoenix's Girls in Tech, and of AI platform Botco.ai.

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Mark Oswald

Lifetime Achievement Award

CEO | Sizzling Steak Concepts

Chair: Jay McDonald | Member since 2002 | CE 155

1,000 teammates. 13 locations. 45 years in the industry. Mark Oswald, CEO of Sizzling Steak Concepts, has led the largest Ruth's Chris franchise through some of history's biggest ups and downs — and has retained much of his staff throughout.

In a business known for turnover, here are Mark's tips for differentiating:

1. By example, inspire loyalty. If you ask your team to make sacrifices, you must also.
2. Create a culture of growth. If you don't provide opportunities, your employees will find others.
3. Offer generous benefits. (Many restaurants offer none.) Take care of your people.

Mark is also a founding participant in The Giving Kitchen, a nonprofit helping hospitality industry associates experiencing misfortune.

 **HEAR MORE**



Marty Palmer

Leadership Award

President/CEO | Palmer Candy Company

Chair: Cathy Fitzhenry | Member since 2011 | CE 03630

One of the oldest candy companies in the U.S., Palmer Candy has been under continuous family ownership since 1878. Marty Palmer joined the business in 1980 and, since then, has grown the size of the company twentyfold.

Marty believes it's his job to inspire his team and bring the 141-year-old business into the modern era. Using an approach that values "clarity of vision, pride in the work and passion for what we do" over metrics, Marty leads a joyful team with low turnover.

Marty's tips:

1. Encourage new ideas, even if they fail.
2. Seek out "star quality."
3. Give people tailored tools to be all they can be.
4. Remove fear of punishment for not always getting it right.
5. Pursue growth, but stay true to your roots.

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Lisa Reardon

Leadership Award

President | OwnersEdge Inc.

Chair: John Howman | Member since 2010 | CE 10006

Lisa Reardon is an evangelist for ESOP. In fact, her company's first acquisition was the result of her impassioned speech on the topic.

Known as the epitome of servant leader, Lisa has these tips:

1. Constantly attract, grow and retain top talent.
2. Stop overextending yourself. Become energized by the work.
3. Leverage Vistage peer perspectives and experiences.
4. Put good development practices in place, so people are ready to advance.
5. Enroll executives in Vistage. Create a common language and culture.

With a mission to help Wisconsin workers thrive as business owners, the OwnersEdge portfolio has grown to four companies, it's added more than 100 employee-owners, and revenues have tripled.



Aaron Scott

Impact Award

SVP | E.A. Sween

Chair: Brian Davis | Member since 2018 | KEY 9258

“How you handle the people in the situation is what dictates the outcome.” Teamwork is paramount in Aaron Scott’s leadership approach. A new executive and a leader that genuinely cares for his people, Aaron balances empathy with what is right for the business.

Here are his tips:

1. Don’t hurt 600 people because you are worried about one.
2. Listen and interact with curiosity, instead of giving immediate direction.
3. Take the emotion out of making decisions.
4. Use an accountability matrix to improve team structure.

As SVP of Operations at E.A. Sween, Aaron has led a team of 600 to increase supply chain efficiencies in the delivery of more than 80 million packaged food items each year.

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Richard (Rick) Serra

Lifetime Achievement Award

President/CEO | Allpro Parking, LLC

Chair: MJ Caliendo | Member since 2009 | CE 4827

For Rick Serra, “the hardest thing was letting go of being the one to make all the decisions.” Empowered by his Vistage group, Rick let go, and his leadership soared. Rick has built an organizational culture that celebrates growth, establishing a high-EQ leadership model that puts employee development first.

Here he shares words to lead by:

1. In meetings, sit on your hands. Give others the opportunity to speak. Direct gently until they reach answers “themselves.”
2. Making mistakes is a step in good personal development.
3. Coaching is essential to success.
4. Never stop learning better/different ways of doing things.
5. Lead by example. Never ask anyone to do something you aren’t willing to do yourself.

 **HEAR MORE**



Robyn Benincasa

 Speaker

World Champion Adventure Racer and best-selling author Building world-class teams

How can you lead your team to adapt, overcome and win as ONE — against all odds?

A group of successful individuals can become even better, together, using the Essential Elements of Extreme Team Performance:

- Total commitment
- Empathy and awareness
- Adversity management
- Mutual respect
- “We” thinking
- Ownership of the project
- Relinquishment of ego
- Kinetic leadership

Robyn Benincasa is a World Champion Adventure Racer, San Diego firefighter, 10-time IRONMAN triathlete, New York Times best-selling author, CNN Hero, and founder and CEO of the 501(c)(3) Project Athena Foundation. For 20 years, she has studied team building, leadership and performance in the most extreme classrooms on Earth.

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Greg Banning

 Speaker

Head of Commerical Sales | Marketo POP²: A cultural leadership journey in establishing a world-class organization

Providing a safe, secure, respectful and inclusive place for people to be themselves and do the best work of their lives is critical to having a long-term competitive advantage in today's business world.

People, Ownership, Purpose and Passion (POP²) are the focus of the renaissance CEO aimed at building a connected culture:

- As a leader, your People need to be your No. 1 priority at all times.
- Empower your staff to have Ownership in the process and outcomes of the business.
- To produce work full of pride, employees need to know the Purpose they serve and how valuable they are.

Greg Banning is head of commercial sales at Marketo, drawing from 20+ years of experience to provide executive leadership.

 HEAR MORE



Conscious leadership

“

I wouldn't ask anyone to do anything I wouldn't do myself.”

– Indra Nooyi



Jason Arceneaux

Impact Award

President | ARC Energy Equipment, LLC

Chair: Jim Dore | Member since 2016 | CE 04842

With wisdom that surpasses his years, Jason Arceneaux is ARC's calm amidst chaos. "Be a rock," he says. "It gives people a sense of safety." Leading through adversity such as Hurricane Katrina, Jason has built a company that retains high-performing talent by rewarding hard work and modeling honest communication.

Jason's tips:

1. Be grateful in the good times.
2. Know the bad times won't last forever.
3. Spend focused time with every direct report.
4. Culture is more important than experience.
5. Give your team a sense of ownership.
6. Employee engagement starts at the top.

When asked about Jason, a Vistage peer said, "I've never seen and worked with a more positive young leader in all my years in business."

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Ted Broman

Lifetime Achievement Award

Owner | Spruce Capital

Chair: Dwayne Nielson | Member since 2006 | CE 507

Ted Broman has created several multi-million-dollar businesses, currently owns more than 15, and considers himself one of the luckiest people alive. With a diverse portfolio that includes Smart Staffing — employer of 3,000+ — and the nonprofit The Other Side Academy — solving the problem of addiction and recidivism — Ted has found his rhythm doing what he loves most and is best at.

Ted's top 7 leadership tips:

1. If you don't have an assistant, you are an assistant.
2. Prioritize culture, purpose, mission and values.
3. Love those you lead.
4. Always be worthy of trust.
5. Live a balanced life. Put your phone down.
6. The answer is always in the question. Ask more.
7. Add more value than you take.

 **HEAR MORE**



Mark Evans

Lifetime Achievement Award

Owner & President | Burton AC, Heating, Plumbing and More

Chair: Rick Faber | Member since 2013 | CE 04081

Mark Evans qualifies his success with characteristic humility: “We are doing a lot of little things right.” 24 hours a day, 365 days a year, Mark’s loyal team is thriving, due in no small part to his steadfast approach to developing himself as a leader. Mark is tireless in his pursuit of providing a wonderful work environment, resulting in above-average tenure.

His leadership tips:

1. Weigh business and human aspects in decisions.
2. Be attached to the outcome, not the process of getting there.
3. If you delegate to the right person and provide good resources, they will take the ball and run with it.
4. Hire people smarter than you are.
5. Your company is only as good as the team you put together.

 **HEAR MORE**



Rick Finfera

Impact Award

CEO | Legacy Brokers

Chair: Jeff Hutsell | Member since 2017 | CE 3771

There to help at a moment’s notice. A leader that thinks of others first. Truthful, always. Rick Finfera brings the dedication, wisdom and perspective of a U.S. Army Special Forces Officer to his Vistage group, inspiring growth and connection in all.

Rick’s leadership tips:

1. Leadership is never about you. The moment it is about you, you have failed.
2. If you talk about the truth, people will want to work with you.
3. Give people the space and resources to build knowledge.
4. Embrace the triangle of understanding: The base is data, then information, then intelligence, followed by knowledge and finally understanding at the top.
5. Re-evaluate regularly. Is what you’re doing leading to the objective?

Rick considers his Vistage group to be his Special Forces team of business leaders.

 **HEAR MORE**



Jim Ginther

Leadership Award

Partner - Operations | U.S. Compliance Corp.
Chair: Brian Davis | Member since 2014 | CE 03745

“If we were going to improve as a company, it needed to start with me.” Jim Ginther once thought being a better leader meant a willingness to “try new stuff in/on the business.” His experience with Vistage opened his eyes to the realization, being a better leader meant working on himself.

Jim was particularly motivated by insights from Vistage speaker Michael Allosso:

1. Anytime you are in front of your team, you are on stage — have you prepared properly?
2. Are you ready to live the culture you are asking for?
3. Are you approaching everything you do with intentionality?

Jim transformed from working in the business to ON the business, restructuring, delegating with confidence and embracing vulnerability.

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Bob Hendrickson

Lifetime Achievement Award

President | Republic National Distributing Company Inc.
Chair: Nina Atwood | Member since 2006 | CE 641

“To me, the trademark of my success ... has been the people I work with.” Bob Hendrickson has more than 30 years of wine and spirits industry knowledge, and he freely shares that wisdom with his Vistage group. A member for 12 years, Bob has leveraged his learnings to complete several acquisitions, expanding RNDC from \$2B to over \$7B in sales. Though he’s reached the pinnacle of success in his industry, Bob remains humble and committed to self-improvement, and is recognized by peers as a “team guy all the way.”

Bob’s tips:

1. Make sure your leaders have access to ongoing development. (RNDC has 18 executives in Vistage.)
2. Never stop learning.
3. Surround yourself with positive team members who share your goals. This makes it all worthwhile.



Ray Isaac

Leadership Award

President | Isaac Heating & Air Conditioning
Chair: John Bayley | Member since 2005 | KEY 9502

Speaking about Ray Isaac, a Vistage peer said, "Ray epitomizes what leaders should be and how they should act at all levels." Prior to transforming Isaac Heating & Air Conditioning into a "NYS Best Place to Work," Ray seriously considered leaving his third-generation family-owned business. Searching for passion, he looked inward to become the leader his employees needed.

Ray's business axioms:

1. Define your own vision.
2. Strive to be a calming presence.
3. In a family business, your last name is a responsibility, not a privilege.
4. Even if the industry doesn't excite you, the leadership and culture can.
5. Be comfortable in your own skin.
6. If you hate your business, don't expect employees to love it.



Chris Jennings

Lifetime Achievement Award

President & Owner | Chris Jennings Group
Chair: Leslie Whitney | Member since 2009 | CE 3170

Chris Jennings takes client and peer success personally. Known by Vistage peers to be "100 percent committed to service, particularly within the Vistage community," Chris places great value in being useful, be it to fellow members in his group, those he reaches as a speaker, or his own team.

Chris' advice gleaned over 24 years in the consulting industry:

1. Own your mistakes as fast as you can, and implement change.
2. Run ideas past others to target where best to direct your energy.
3. "Prune" your energies. Optimize expertise in fewer areas to be really good at what you do.
4. Have stretch goals. Push yourself further.

Since joining Vistage, Chris has grown his business from \$1M annually to over \$5M.

 **HEAR MORE**



Mary Searcy Bixby

Leadership Award

Founder, President, CEO | Altus - The Charter School of San Diego

Chair: Steve McNulty | Member since 2012 | CE 0012

Mary Searcy Bixby has dared to make a difference in a field calling for responsible, reasonable change. As president and CEO of Altus Schools, Mary has improved education for 44,000 students, leading The Charter School of San Diego become the first K-12 school in America to receive the Malcolm Baldrige Award. Mary's scalable, innovative school models center on technology-rich resource centers and specially trained teachers.

Her team thrives under a unique standard of leadership that is:

1. Non-positional. Everyone has the opportunity to be leader or servant at different times.
2. Not managerial. Focused on real, intended change.
3. "Not just something you do." Leaders are the stewards of company culture.



Ron Weatherly

Leadership Award

Founder & CEO | Dry Pro Systems

Chair: Tom Grogan | Member since 2013 | SB 02284

Ron Weatherly believes the service he offers is just a way to bring in revenue. His real work is improving people's lives. His leadership is driven by this ethos — not limited to employees, but encompassing customers and community as well.

Some secrets to Ron's success:

1. Instill a culture of learning that includes the C-level.
2. Provide benefits to employees that inspire authentic dedication.
3. Build a reputation, and honor it. Do what you say you will, when you say you will do it.

In Ron's own words: "I realized the business was only going to be as large as the leaders running it. Growth needed to come from people growing." Dry Pro Systems has been voted one of the best places to work in Charlotte.

 **HEAR MORE**



Chris Hyland & Bill Priemer

Leadership Award

Chairman of the Board & CFO (Chris Hyland), President & CEO (Bill Priemer) | Hyland Software

Chairs: Cheryl McMillan and Bradford Roller

Member since 2008 (Chris), 2010 (Bill)

CE 03547 (Chris), CE 321 (Bill)

Few companies maintain the positive qualities of a start-up as they press past \$750M in revenue. Hyland Software is an exception. Chris Hyland and Bill Priemer have realigned leadership, products and systems to meet the needs of a fast-growing company — while ensuring their employee base still considers itself part of a family. Now an international leader in content service provision, Hyland Software is a Fortune 100 “Best Place to Work” six years running.

Integral to its growth was partnering with a private equity firm.

For a successful partnership, Chris and Bill recommend finding an investor that:

1. Understands critical success factors for your specific kind of business.
2. Can offer advice on best practices.
3. Provides visibility into competitor businesses.
4. Trusts your ability to run the business.

 **HEAR MORE**



Elizabeth Lombardo

 **Speaker**

Ph.D., Speaker & Concierge Coach
Leadership from the inside out

How can you rewire your brain to optimize your leadership?

Start mastering the “3 P’s” — Passion, Purpose and People:

1. Realize when you are making decisions from a place of distress, instead of Passion.
2. Grow your Purpose by identifying how you spend your time, money and energy. Is it in alignment with your goals?
3. Listen to your People. Recognize that for every outward behavior, there is a positive underlying motivation.

Best-selling author Dr. Elizabeth Lombardo is on a mission to free people from their inner critic to create the health, wealth and happiness they crave. Her ability to help people unlock their unique personal happiness code has made her America's most-interviewed celebrity psychologist.

 **HEAR MORE**



Innovation



Logic will get you from A to B. Imagination will take you everywhere.”

– Albert Einstein



Paul Danos

Leadership Award

Executive Vice President | Danos

Chair: Jim Dore | Member since 2017 | CE 04842

In an industry where the trend is to cut back man hours in favor of automation, Paul Danos empowers employees to chart a course into the future, equipping them with cutting-edge technology and establishing the Danos CARES program to fund employee-driven community initiatives.

Described by a Vistage peer as “a visionary ... who understands working from the ground up,” Paul ties all decisions for his third-generation family business back to core values — the heart of which is a culture of respect.

Paul’s tips:

1. Find the connection between purpose, values, vision and culture: Driven by purpose, reinforce a culture that supports your strategy and propels you toward your vision.
2. Be a voice of reason.

 **HEAR MORE**



Michael Fratkin

Impact Award

CEO | ResolutionCare

Chair: Julie Reinganum | Member since 2015 | VC 07215

Dr. Michael Fratkin started ResolutionCare with a vision of what was possible. Channeling frustration into action, Michael faced head-on the challenges of becoming a business leader, raising capital and integrating telemedicine into comprehensive care for people with serious illness.

Here he shares lessons learned along the way:

1. Don't be afraid to make a difference with your life.
2. Don't acquiesce to the inertia of the status quo. Be willing to shake it up for all the right reasons. And then get lots of help.
3. Race to find talented people to do what you're not good at, so you can do what you are good at.

Michael made it his mission to dramatically improve palliative care. In five years he's delivered on this promise to 1,400 patients.

 **HEAR MORE**



Kevin Grawe

Lifetime Achievement Award

Co-Owner & President | Centriq Training

Chair: Tony Lewis | Member since 2003 | CE 00113

Kevin Grawe's commitment to continuing education for IT professionals has provided advancement opportunities to thousands unable to attend four-year colleges. Considered the innovator of coding boot camp, Kevin's dedication has propelled him through constant change, including selling his company and buying it back — only to make the enterprise grow in value.

He brings inspiration and strategic insights to his Vistage group, including:

1. Turn anger into opportunity to grow the business.
2. No matter how right you are, when you have a partner you disagree with, you have to settle.
3. Know which battles to fight, and when to make the compromise for a better future.
4. Actively seek learning opportunities.

 **HEAR MORE**



Jesse Mecham

Impact Award

Founder & CEO | You Need a Budget

Chair: Dwayne Nielson | Member since 2014 | CE 3968

Jesse Mecham founded You Need a Budget (YNAB), while still in college. To-date, he's helped hundreds of thousands break the paycheck-to-paycheck cycle. Since joining Vistage, Jesse's company has tripled its annual revenue, and he's built a team of 100 remote workers — with less than one percent turnover.

Jesse's remote leadership tips:

1. Effective written communication is imperative.
2. Eschew long meetings, but don't hesitate to jump on a quick call.
3. Value deep work, when people "go dark" and aren't available to chat.
4. Believe your people will do their work. Build on trust.
5. Allow people to work flexible schedules.

YNAB was voted 2019's No. 2 "Best Place to Work in the U.S." by Fortune Magazine.

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Mark Peabody

Lifetime Achievement Award

President | Astronics Advanced Electronic Systems Corp.
Chair: Tom Leonard | Member since 2006 | CE 190

Achieving significant growth in the aerospace industry is not easy. Astronics CEO Mark Peabody realized 10x growth in 10 years. His secret? Be good at everything, but focus on your area of greatness.

For Astronics, that meant industry-leading customer relations. Dedicated to rebuilding Astronics' business foundation, Mark realized, "We need to have engineers who can communicate really well — they can't just be brilliant." This kind of innovative thinking has empowered Astronics to exponential success.

Along the way, Mark has learned:

1. Trust your gut when it comes to your staff.
2. Find what sets your business apart, and run with it.
3. Instead of reacting, take a few minutes to plan a course of action.



Apolonia Rockwell

Impact Award

Founder & CEO | True Safety Services
Chair: Nancy Haboush | Member since 2018 | SB 2429

Saving lives is Apolonia Rockwell's business — and her passion. The founder of True Safety Services has grown her young company to \$5M by emphasizing the personal side of safety compliance. "It's about making it home safe to the people you care about," she says. True Safety provides fun, interactive onsite training, and Apolonia plans to build a facility where clients can put training into practice. As a new leader, her main challenge is creating a culture to attract the best. "We may be small, but our goal is to be the biggest safety company in the world."

Leadership lessons:

1. Be a purpose-driven company.
2. Build personal relationships with clients and employees.
3. Don't tolerate toxicity in your workplace.



Steve Garguilo

 Speaker

Co-Founder | Action Surge The science of taking action

How many times have you had an idea you were really passionate about? How many times has that idea vanished into thin air because the “perfect” opportunity never came?

Combat procrastination and start taking action with these tips:

1. Exercise your action muscle. Detail specific steps you can take to get the ball rolling.
2. Stop waiting. What can you do right now to start taking action?
3. Collaborate. Gain perspective and motivation by bringing peers into the conversation.

Steve Garguilo, co-founder of Action Surge, helps people make their ideas happen. Steve led the revolution to transform the culture of Johnson & Johnson, shaping a grassroots movement that engaged 23,000 employees.

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Scott Klososky

 Speaker

Founder | TriCorps Technologist The technology integration of humanity

The technology integration of man will have positive and negative effects. Will you — and your company — win or lose?

Leverage technology in the following ways:

- Build relationship journey maps that detail every touchpoint of engagement.
- Find the HUMALOGY® balance, using tech to augment human efforts and wow customers.
- Develop hyper-personalization within engagement efforts.
- Get the customer talking about their experience to their networks.

Scott Klososky, founder of TriCorps Technologies, lives on the leading edge of technology innovation. He is globally recognized for his ability to accurately predict future digital trends and explain why they will alter the status quo.

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Transformational change

“

Growth and comfort do not coexist.”

– Ginni Rometty



Richard Aste

Impact Award

Director | McNay Art Museum

Chair: Charles Marino | Member since 2016 | CE 3867

Richard Aste assumed the role of McNay Art Museum CEO faced with a challenge — transform a staid institution in financial decline into a progressive organization. The biggest roadblock? The status quo. Succeeding a CEO who'd held the position for 25 years, Rich recalls, "Not everyone got the memo I was brought in to be a change agent."

Undeterred, Rich has propelled McNay into the present-day, achieving his vision gradually, purposefully and inclusively:

- Gradually: Over 2.5 years, went from three departments to eight to flatten the organization.
- Purposefully: Made decisions based on data and best practices from other art museums.
- Inclusively: Staff and board of trustees are collaborators in the process.



Beth Hahn

Impact Award

President | Berkshire Systems Group, Inc.

Chair: Joni Naugle | Member since 2015 | CE 3765

"I worry about 112 families, not just my own. These are our business families — my responsibility when I walk through these doors." Before assuming control of Berkshire Systems Group Inc. from her father, Beth Hahn spent 30 years running her own business alongside his. This experience helped smooth a transition encompassing significant C-level changes.

When Beth took over, she recalls, "Nothing was really excellent." To take BSGI from "coasting" to world-class, Beth's strategy included establishing a clear company culture with a focused theme to work on each year.

Themes included:

- 2017: Realignment (New software)
- 2018: Quality over quantity (New processes)
- 2019: Impact (Community service)

 **HEAR MORE**



Scott Hester

Leadership Award

President | Counselman-Hunsaker

Chair: Jonathan Jones | Member since 2015 | CE 4477

From the moment he took over as president of C-H, Scott Hester focused on strategically preparing the next generation of owners.

Some of his lessons learned:

1. Seek out veteran teammates. You can't replace the value of experience.
2. Practice open-book management. Ensure your people understand the financials, opportunities and challenges.
3. Identify key employees that have entrepreneurial spirit, can take the risk and are good leaders.
4. Treat employees as your greatest asset.

Since joining Vistage, Scott has doubled the size of C-H in revenue and employees, and secured an exclusive partnership with the American Red Cross — a game-changing opportunity for the company, uniquely tied to its mission.

 **HEAR MORE**



David Hicks

Impact Award

CEO | Home Vestors of America, Inc.

Chair: Ed Burke | Member since 2016 | CE 3715

How do you lead a company from survival to growth? David Hicks mined adversity for opportunity by examining HomeVestors' core purpose and investigating non-traditional avenues to achieve it. Implementing an innovative fee structure and leveraging new income streams, David established a stable basis for expansion.

David's axioms for transitioning to growth:

1. In every adversity there is a seed of equal or greater benefit. (Paul J. Meyer)
2. Leverage crisis as an opportunity to evaluate who you really are.
3. Get the right people in the right seats.
4. A person who says "that's not my job," doesn't belong.

Since 2008, HomeVestors has grown from 165 franchises to more than 1000, in 40 states and 170 cities.



David Knotek

Leadership Award

Co-Founder & CEO | Smart LLC

Chair: Steve Elson | Member since 2011 | CE 492

3000 percent growth in eight years. Since joining Vistage, Leadership Award winner David Knotek has transformed a small company into an international powerhouse. As CEO and co-founder of Smart LLC, global leader in premium car care products, David has revolutionized the automotive aftermarket parts business model.

He attributes much of his success to a Jim Collins “20-mile march” ethos:

1. Simplify. Hone your focus.
2. Recognize where the momentum is going, and just go for it.
3. Once you have clarity, build a culture and discipline.
4. Rain or shine, every day keep marching.

David has set a new mold for how businesses operate and sell in the era of personal engagement and lifestyle-driven marketing.

 **HEAR MORE**



Cory Jackson

Lifetime Achievement Award

CEO | CTG

Chair: Jay Curry | Member since 2008 | CE 3559

Cory Jackson grew up working in his family’s gasket manufacturing firm when the business ran on heavy machinery and hard labor. When he was ready to take on a leadership position, Cory automated processes and re-engineered company culture to focus on employee development and community service — changes that have made CTG an industry leader.

His key learnings:

1. Surround yourself with good people who will connect you to other good people.
2. Be transparent with your management team. Connect your success to their contributions.
3. Identify core strengths, play to those, and don’t be distracted.
4. Run a business like a meritocracy.
5. Build your business to function well without you.

 **HEAR MORE**



Jeff Rafn

Lifetime Achievement Award

President | Northeast Wisconsin Technical College (NWTC)
Chair: Phil Hauck | Member since 2007 | CE 00003

Under Dr. Jeff Rafn's leadership, NWTC has transformed, and enrollments have risen 62 percent. Integral to his leadership success has been eschewing micromanagement to empower his team.

Jeff's tips:

1. Trust your employees.
2. Stop reworking and checking everything everyone does. This undercuts confidence.
3. Embrace your role as coach and teacher, but allow for independence.
4. Allow yourself to grow in perspective and knowledge. It does not have to be done your way.
5. Embrace "productive conflict" to encourage crucial conversations.

NWTC is the only WI institution, and one of only 31 nationwide, recognized by the Bill & Melinda Gates Foundation as a "leader in transformation change for student success."



Brent Thalasinis

Impact Award

President/ CEO | T&T Enterprises
Chair: John Morris | Member since 2017 | SB 2769

While other kids were riding bikes or skateboards, Brent Thalasinis was riding a forklift at his father's nuclear parts supply business. Now owner and CEO of T&T Enterprises, Brent carries his father's business legacy forward while putting his own stamp on company operations.

Brent's leadership ethos:

1. You don't and can't know everything. Listen to your team.
2. Forge strong, lasting relationships with employees and clients.
3. Be transparent and honest through company change.

Brent steered the application for a certification that opened up new sales channels for T&T, and has revolutionized the firm's marketing and sales approach. Through every transformational change, Brent has maintained a servant leader approach.

 **HEAR MORE**



Ron Turnier

Lifetime Achievement Award

President & CEO | What Chefs Want

Chair: Bill Houston | Member since 2000 | CE 394

Twenty-two years ago, Ron Turnier bought a one-employee, one-minivan company. From humble beginnings, that company has become the market gold standard for industry-leading technology, one-of-a-kind marketing strategy and service unlike anything the food service industry has experienced.

Here are some of Ron's key learnings on how to differentiate from the pack:

1. Stop trying to be like competitors.
2. Avoid the mushy middle, have a defined value proposition.
3. Ask your clients: "What can we do differently to help you succeed?"
4. Utilize a small, non-commissioned salesforce.

Ron now has 700 employees and 230 route trucks, serving 16,000 customers.

 **HEAR MORE**



Debbie Winn-Horvitz

Leadership Award

President & CEO | Jewish Association On Aging

Chair: Tricia Warrick | Member since 2016 | CE 4795

Facing fierce competitive headwinds, Debbie Winn-Horvitz has served as a tenacious change-agent leading the Jewish Association on Aging (JAA) through execution of a transformational strategic plan. A Vistage peer notes: "Faces light up as we walk the halls of the JAA with her." From state-of-the-art independent living to piloting the first wireless call bell system in the U.S., Debbie's pursuit of innovation and ability to navigate change in the mercurial nonprofit healthcare landscape has made the JAA a resilient and valued community partner.

Debbie's learnings:

1. Decisions aren't hard; it's the aftermath that is hard.
2. Be prepared to pivot your strategy quickly.
3. Good processes start with good teams.

 **HEAR MORE**



John O'Leary

 Speaker

Best-selling author

The 7 choices to ignite a radically inspired life

What if you lived a radically inspired life every, single day?

Transform your life and business with:

Accountability: Take ownership and see the impact on your bottom-line.

1. Own your wins and failures to truly celebrate your outcomes.
2. Inspire your team to replace blame-shifting with courageous living.

Victor-mindset: Shift perspective to leverage your strength and reclaim freedom.

1. Observe how perspective is coloring your interactions.
2. Strive for progress, not perfection.
3. Instill this mindset in your team.

When he was nine years old, a devastating fire left John O'Leary burned on 100 percent of his body, with a one percent chance to live. Today, he inspires 75,000+ people at 100+ events each year.

 [HEAR MORE](#)



Jack Uldrich

 Speaker

Global futurist and best-selling author

The big AHA: How to future-proof your business against tomorrow's trends, today

Technology is changing at an exponential rate. As a leader, how can you stay agile?

Keep your footing amidst constant change using the AHA framework:

- Awareness: Constantly look at what is happening around you.
- Humility: Do not think it can't happen in your industry. It can and it will.
- Action: Ponder and plan what your business will look like in the future — every week. Get a reverse mentor.

Global futurist Jack Uldrich is a former naval intelligence officer. His expertise is often called upon by major media outlets including CNN, CNBC and NPR. A frequent speaker on technology, change management and leadership, Jack has addressed hundreds of organizations worldwide.

 [HEAR MORE](#)



A purposeful mission

“

If not us, who? If not now, when?”

– John F. Kennedy



Josh Arant

Impact Award

Co-Founder & COO | Mako Medical

Chair: Chris Quinn | Member since 2018 | CE 5685

Supporter of 472 nonprofits. Employer of 250+ veterans. Triangle Business Journal's "#1 Fastest-Growing Company," a record-setting three consecutive years. (No small feat for a company only in business for four.) In co-founder and CEO Josh Arant's own words, "Mako Medical proves you can have faith, spread kindness, give back and still build a successful company."

Integral to Josh's continued success? Letting go:

1. Allow people to make the decisions and fail. Then help them grow, to do better next time.
2. Empower your team to be "intrapreneurs." Provide transparency and autonomy to foster ownership and creativity.
3. Trust you have put the right people in the right places. Trust them to follow through.

 **HEAR MORE**



Lawrence Closs

Lifetime Achievement Award

CEO | MaxHome LLC

Chair: Arthur Mears | Member since 2009 | CE 115

"Everybody Happy." It's more than a corporate mission statement. It's words to live by for Larry Closs, a leader whose "family" approach to business positively impacts employees, clients and community.

Here are some of Larry's family values:

1. Be mindful of policy, but not only policy.
2. Treat all people with love and compassion.
3. Define your values and rework them as you grow.
4. The need for reflection never goes away.

After starting his business in 2002, Larry faced enormous challenges when Hurricane Katrina destroyed his entire stock. Undeterred, Larry opened a new warehouse, reevaluated his business model, and is now recognized as running one of the fastest-growing inner city companies in the U.S.

 **HEAR MORE**



Cristina Cordeiro

Impact Award

CEO | Dream Big Children's Center
Chair: Anna Kennedy | Member since 2018 | SB 2848

For Cristina Cordeiro, “dream big” is more than a catchphrase. As CEO of Dream Big Children’s Center, Cristina has built a thriving indoor play and education center where kids can just be kids — regardless of ability or diagnosis.

With three locations and growing, Cristina first looked inward to lead her business to success, finding:

1. You do not have to have all the answers. Look to your team, peers and mentors.
2. Embrace a mindset of growth. Let go of limiting beliefs.
3. Train your management team to run the day-to-day, so you can focus on the long-term.

Play center and autism therapy provider combined, Dream Big is a place where labels don't matter — with an impact felt far beyond its walls.

 **HEAR MORE**



James (Jim) Dentinger

Leadership Award

President | McGuire Development Company, LLC
Chair: Mike LaMancuso | Member since 2015 | CE 4996

Many have asked McGuire Development president Jim Dentinger, “Why are you doing it this way?” The short answer: Jim believes with fiduciary transparency, a real estate development firm can empower clients to make better, faster, more informed decisions.

Here's how Jim has remained accountable to his mission:

1. Get better at staying no. Focus efforts on initiatives that impact the well-being of the community.
2. Align vision, budget and timing. Right-size the project.
3. View jobs from a relationship (rather than transactional) standpoint.

In disclosing all fees, markup and unforeseen costs, Jim’s approach is widely credited as having revolutionized the industry.

 **HEAR MORE**



Anne Lindblad

Impact Award

CEO/President | Emmes

Chair: Debbie Tyler | Member since 2016 | CE 4222

How do you judge if a benefit is worth the risk, when your company's future hangs in the balance? For Emmes CEO Anne Lindblad, the benefit was not just growth of the company, but growth of the scientific research it supports.

In considering her options, Anne wanted to ensure Emmes could continue its work advancing new treatment options and preventing public health threats. She found the right financial partner, and her only regret is that she didn't make her decision sooner. "It's given us opportunities to do really exciting things," she says.

Anne's CEO advice:

1. When you don't know something, don't go it alone.
2. Stick to vision and KPIs will be achieved naturally.
3. People always come first.

 **HEAR MORE**



Douglas Jackson

Leadership Award

President & CEO | Project C.U.R.E.

Chair: Don Myers | Member since 2012 | CE 3126

How do you get 35,000 people to show up to work for you — for free? Doug Jackson, Project C.U.R.E. President & CEO, looks to the distinction between passion and purpose. "Passion comes and goes," he says. "When you focus your purpose on helping other people, it becomes a totally different conversation."

To ensure a good fit, potential staff and volunteers are carefully screened to ascertain:

1. What is uniquely meaningful to you?
2. Why do you want to do this?
3. Do our purposes align?

Thousands die every day because hospitals and clinics lack the supplies and equipment needed to save lives. For more than 20 years, Doug has lead Project C.U.R.E. in its mission to deliver health and hope to the world.



Jim Mason

Lifetime Achievement Award

President & CEO | Beech Acres Parenting Center
Chair: Jeffrey Lazarow | Member since 2001 | CE 327

Teacher, coach, probation officer, therapist — and leader. Jim Mason has committed his professional life to one purpose: Strengthening families so children can achieve their unique potential. In his 40-year career, Jim has led nonprofit Beech Acres in uplifting communities, creating a social support that empowers parents to be there for young people.

His ethos includes:

1. Leaving behind a paternalistic “rescue” mentality.
2. Looking to the up-and-coming workforce for inspiration in addressing traditional challenges.
3. Not just helping one, but providing the tools to help many.

In a rapidly changing environment, in Jim’s own words: “Build a strong team and stay focused on the North Star of your purpose.”

 **HEAR MORE**



Brian Murphy

Lifetime Achievement Award

Owner | BAM Contracting
Chair: Andy Bourey | Member since 2009 | SB 810

“When a kid comes back after 10 years to tell you, ‘If it wasn’t for you, I wouldn’t have been able to do this,’ that is so powerful.” For 20+ years, Brian Murphy has given back, recently collaborating to donate more than \$25K in labor and materials. A true servant leader, his hard work has earned him a reputation as the best — and his philanthropy has changed lives.

Some words of wisdom:

1. Stop worrying what people think. Do what is right.
2. Be you, and do it really well.
3. Help people be part of something bigger than they are.
4. Be generous with your time, resources and support.

In Brian’s tenure with Vistage, he’s gone from being two weeks away from running out of money, to growing his business to over \$20M.

 **HEAR MORE**



Paul Robinson

Impact Award

President & CEO | Home of the Innocents
Chair: Randy Fields | Member since 2018 | CE 4003

If you were to sell, what would the number be? What if — out of the blue — you got your dream ask? Paul Robinson spent 21 years as owner and operator of 19 successful Papa John's franchises. When his business sold, he found himself adrift. What now? He returned to his hometown of Louisville and took the helm of Home of the Innocents, growing the nonprofit's reach by half, increasing families served from 8,500 to 13,000.

Paul's tips for finding your way to a newly fulfilling career path:

1. Look inward.
2. Try new things — rediscover what you enjoy.
3. Change your location.
4. Find a role in which you can truly have an impact.
5. Allow things to “come together.” Embrace what you are naturally called to do.

 **HEAR MORE**



Scott Mautz

 **Speaker**

Founder | Profound Performance
The leadership secret of today's high-performing organizations

Perks, promotions and pay. These aren't what motivates today's workforce. On the contrary, research shows meaning-rich organizations get results like no other.

Foster meaning in and at work with “Markers of Meaning”:

- Find purpose: Teach the importance of doing work that matters.
- Feed personal growth: Think of what you can do daily to promote learning.
- Inspire self-esteem: Plant seeds of growth, not doubt.
- Grant autonomy: Help employees push back on fear of failure.
- Craft an environment of authenticity: Show you care.

Scott Mautz is the founder of Profound Performance, where he teaches audiences how to motivate employees and themselves for peak performance, fulfillment and talent retention.

 **HEAR MORE**



Courage

“

Run to the fire – don't hide from it.”

– Meg Whitman



Brian Allen

Lifetime Achievement Award

President | Precision Walls, Inc.

Chair: Bill Buxton | Member since 2001 | CE 00488

Founded in 1977 with just a handful of employees, Precision Walls, Inc. is now recognized among the Top 10 wall and ceiling specialty contractors in the U.S. Brian Allen became president in 1999 — having never before held a leadership position in the business. “We transitioned the company cold turkey,” he says. Empowered by his Vistage group, Brian’s lack of experience became an asset to his leadership style.

Brian’s tips:

1. Foster passion that makes people WANT to do the work.
2. Look at the weeds, but don’t get into them.
3. Be a student in your industry.
4. Find peers outside your industry.
5. Help people see there is more than one way to do things.
6. Have lots of “green” conversations, not just “red.”

 **HEAR MORE**



Kevin Bolding

Impact Award

President & CEO | YMCA of Pittsburgh

Chair: Dick Singer | Member since 2017 | CE 676

In his 20 years with the YMCA, Kevin Bolding has never wavered in his service and dedication — even when it meant putting himself on the “hot seat” with the community and press for the ultimate good of the organization. Kevin’s difficult decision to restructure ensured YMCA Pittsburgh is equipped to serve the community for years to come.

Kevin’s non-profit success code:

1. Don’t try to change too much too fast — avoid the snowball effect.
2. Make sure you’re looking at the diverse needs of your people within, as you’re looking forward.
3. Be cognizant of the dual bottom line. Don’t prioritize mission over finances.

 **HEAR MORE**



Eric Casciaro

Lifetime Achievement Award

CEO | Quantum Solutions

Chair: Jonathan Jones | Member since 2016 | CE 03844

From putting himself through college as the first of his family to earn a bachelor's degree, to enacting critical change as CEO of QSI. When Eric Casciaro sets his mind to something, he rolls up his sleeves and gets it done. Armed with insights from his Vistage group, Eric instilled new processes at QSI, taking the company from \$1.3M to \$5M in sales in 2018.

Here are the top five things Eric did to help the company grow and be more stable:

1. Diversified the client base.
2. Built the management team.
3. Networked to make connections for help with marketing and strategy.
4. Restructured leadership to establish a clear decision-maker.
5. Determined direction and core values — taking the emotion out of it.

 **HEAR MORE**



Michael Girdley

Leadership Award

**Investor and Entrepreneur, Managing Director |
Geekdom Fund**

Chair: Tom Cuthbert | Member since 2014 | CE 4446

"You start to learn who you are, and what your strengths and weaknesses are." Michael Girdley, San Antonio's 2015 Businessman of the Year, took stock of his skills and made a bold decision — to stop running his businesses. As co-founder and managing director of Geekdom Fund, Michael has given four tech startups everything they need to flourish, from carefully selected C-level leadership to a standardized playbook for HR, finance and more.

Keys to equipping his businesses to thrive:

1. Expect all businesses to use the playbook. Hold leaders accountable.
2. Ensure CEOs embrace the structure and understand that they do not need to reinvent the wheel.
3. Create a common language and consistent framework across businesses.



Steve Haise

Leadership Award

CEO | All Safe Industries

Chair: Melissa Fraser | Member since 2018 | CE 4277

How is the business going to run without me? It's one of the toughest scenarios a leader can face. For Steve Haise, it became reality. After serving in the Navy, Steve founded All Safe Industries out of his home. From a one-man operation to the leading supplier of safety equipment, when Steve had to take an eight-week leave, his team was empowered to step up and thrive.

Here are some of Steve's hard-earned tips for building a business that works without you:

1. Develop processes for sharing responsibility with a program like Traction.
2. Prepare for your worst-case scenario.
3. Relinquish your inbox.
4. Be a steadfast presence to guide your team through uncertainty.
5. When you return, continue delegating.

 **HEAR MORE**



Lynne Olewine

Impact Award

President | Pharmacy Benefit Dimensions

Chair: MJ Caliendo | Member since 2016 | CE 4827

When Lynne Olewine was appointed president of Pharmacy Benefit Dimensions (PBD), the promotion was nearly two years ahead of schedule.

Lynne embraced the challenge by:

1. Asking for help. Lynne knew she had tactical experience but lacked strategic experience. So she joined Vistage.
2. Staying humble. Lynne was brilliant at what she did, but knew she had a lot to learn.
3. Staying transparent. Lynne shared her uncertainties with her team and, in turn, earned their complete support.

Under Lynne's leadership, PBD serves more than 4,000 employer groups and nearly 500,000 members in 50 states. Its posted profits are the highest in the company's history.

 **HEAR MORE**



Scott Reardon

Impact Award

President/ CTO | D3 Engineering LLC

Chair: Tom Merkel | Member since 2014 | CE 0048

How far outside of your comfort zone would you go to advance your leadership? When Scott Reardon founded D3 Engineering in 1999, he was an exceptional engineer — with no experience managing people. Working with his Vistage Chair and group, Scott gained the tools to turn D3 into one of Rochester's fastest-growing businesses, realizing triple-digit growth.

Some of Scott's learnings:

1. Make decisions that put your company on the path to success, even if it puts you outside your comfort zone.
2. Identify what is keeping you from success. Be willing to learn how to fix it.
3. Role models are crucial to improving as a leader.
4. You can't stay the smartest person in the room and actively pursue growth.



James Tavernelli

Impact Award

Principal | Kohrs Lonnemann Heil Engineers PSC

Chair: Jean Lauterbach | Member since 2013 | CE 3615

"Are we going to survive or fail?" As newly appointed COO of KLH Engineers, Jim Tavernelli found himself faced with a do-or-die test of leadership. Devoted to building and sustaining a culture of continuous improvement and practical innovation, Jim was fearless. With grit, soul-searching and the support of mentors, he got the company back on a growth track.

A leader of the heart, Jim's learnings include:

1. Understand your gifts might be different from others.
2. Inspire engagement in your employees by demonstrating confidence in their ability to push through challenges.
3. Eschew arrogance. Share the honor of work well done.

Jim was recently promoted to KLH president, and is credited with reinventing the firm.

 **HEAR MORE**



David Cook

 Speaker

Performance psychology coach The mindset of a champion

How can you reach your potential in a world of adversity, interference and change?

5 decisions to establish mental toughness:

1. Embrace the pressure. Look forward to game day. See every small challenge as preparation.
2. Prepare for the emergency. There are no surprises — you've trained for this.
3. Paint the masterpiece. Thoughts inform actions and ability. Have a plan for greatness in mind.
4. Trust your talent. Fight the tendency to fixate on what isn't going to work.
5. Persevere. Take one more step. You have your process in place.

Recently named a "Top 10 Mental Game Consultant" by Golf Digest Magazine, Dr. David Cook is expert in helping professional athletes and Olympians become great champions.

 HEAR MORE



Commander Kirk Lippold

 Speaker

USN (Ret.) Leadership and accountability when it matters

How can you get the most from your workforce?

Here Cmdr. Lippold shares his Five Pillars of Leadership, strategies he used to instill integrity in his team and mitigate crises throughout his naval career:

1. Integrity: Do the right thing, at the right time.
2. Vision: Be specific in your goals for your team.
3. Personal accountability: Help your team take responsibility for decisions/consequences.
4. Trust: Give your team the opportunity to succeed and fail.
5. Professional competence: Provide the training, tools and time to do the job right.

Cmdr. Kirk Lippold was in command of the USS Cole when it was targeted by a deadly al Qaeda attack in 2000. His leadership galvanized his crew to action and saved lives.

 HEAR MORE



Leading by example

“

Anyone can hold the helm when the sea is calm.”

– Publilius Syrus



Alan Boudreau

Leadership Award

President | Boudreau Pipeline Corp.

Chair: Lisa Rios | Member since 2014 | CE 5861

Boudreau Pipeline Corp. president Alan Boudreau says, "We're a people company, not a pipeline company — we just happen to dig ditches for a living." The adage was key to his company's dramatic recovery following a devastating recession. "Only a committed leadership team and a company-wide can-do attitude allowed us to survive," he says. His office staff rose to the challenge, and Alan cold called door-to-door. Today, Boudreau Pipeline has more than \$65M in annual revenue and provides opportunity for 275 employees.

Alan's words of wisdom:

1. Diversify.
2. When you find yourself in hell, keep walking.
3. Don't be afraid to reinvent yourself. Change is good.
4. Care about your team, and show them you care.

 **HEAR MORE**



Al Duncan

Lifetime Achievement Award

CEO | Thomas E Strauss Inc.

Chair: Kirby Martzall | Member since 2010 | CE 3220

"If you wake up in the morning and there's nothing you think you could do better at, go back to bed and wake up again." Al Duncan started working when he was 11 years old. In his 43 years with Thomas E. Strauss, he has grown the business exponentially.

Al's words to lead by:

1. You have not earned a cent until your bills are paid.
2. Be smart enough to know what you don't know, and ask for help respectfully.
3. Sometimes you need to make a hard decision about one or two people for the good of everyone else.
4. Be careful how you treat people and don't take advantage of them.

Al believes people deserve opportunity and respect. By his example, he coaches company leaders to encourage good ideas from all corners.

 **HEAR MORE**



Keith Hildebrandt

Leadership Award

President | AED Brands

Chair: Shaun Bradley | Member since 2016 | CE 4792

As CEO of AED Brands, Keith Hildebrandt saves lives — selling the most reliable defibrillators on the market, while rallying his team to support charities focused on heart health. At the heart of his success? Leading from a place of balance and consistent strength.

Here, Keith shares decision-making tips:

1. Once you make a decision, be decisive. Move forward.
2. Don't make decisions quickly, if you don't have to.
3. Don't allow yourself to be pressured.
4. Never make emotional decisions.
5. Never let your ego get in the way.

Keith values work/life balance — family and faith are a core value of AED. To Keith, formalizing core values is one of the most important decisions a leader can make.

 **HEAR MORE**



Jim Kissick

Leadership Award (posthumous)

President and Co-Founder | Kissick Construction

Chair: Mike Bray | Member since 2019 | CE 4471

"What would Jim Kissick do?" From a leap of faith investment and four employees, to \$120M and a team of 400. Jim was the kind of leader that inspired his team to persevere — because he did.

Some of the ways Jim earned the profound trust of his people:

1. Accessibility. "Don't be afraid to come talk to me."
2. Treating everyone as equals, inspiring deep loyalty.
3. An epic work ethic that trickled down. "I'm not going to give up, because Jim Kissick wouldn't give up."
4. Accountability. If Jim said he was going to do something — he did.
5. Giving back to the community.

Jim's leadership legacy is one of honesty, loyalty, hard work and never saying no to a challenge. He treated his employees as his family.

 **HEAR MORE**



Tony Mazzella

Lifetime Achievement Award

CEO | Mazzella Companies

Chair: Cheryl McMillan | Member since 1995 | CE 321

Tony Mazzella took over his family business in 1988, growing Mazzella Companies from two locations to 28, with a team of +350. Ten years ago, he made a bold acquisition decision that nearly doubled the company in size.

Tony's tips for staying competitive:

1. Instill an environment of constant improvement.
2. Establish a training program for employees to develop leadership skills.
3. Teach managers how to embrace and promote company culture.
4. Be agile. Growth is not a straight line, and you can't stand still.

A Vistage member for 24 years, Tony approaches every group meeting as his first, with a passion for learning captured by his favorite Jung quote: "Who looks outside dreams, who looks inside awakens."

HEAR MORE



William "Bob" Roberts

Lifetime Achievement Award

Chairman and CEO | Roberts Oxygen Company, Inc.

Chair: Clyde Northrop | Member since 1992 | CE 123

Bob Roberts knows: Happy employees, means happy customers. He's lived that philosophy with Roberts Oxygen through three generations of family leadership. Recognized for great employee training and benefits, Roberts Oxygen has a stellar retention rate.

Bob's business wisdom:

1. Treat customers and employees with respect, courtesy and integrity.
2. Make business decisions, not emotional decisions.
3. Find your agility sweet spot.

Bob's belief that a company should hew closely to its core business has led to some tough choices, as well as gratifyingly steady growth. As Bob hands over the reins to his son Will, the company boasts 350 happy employees who know Roberts Oxygen is a career, not a stepping stone.

HEAR MORE



Roberta “Sissie” Shank

Lifetime Achievement Award

Co-Owner | Chas Roberts A/C Inc.

Chair: Karie Montague | Member since 2000 | CE 0159

In a male-dominated industry, Sissie Shank stands out as a leader who can hold her own and lead in the toughest of times. She has demonstrated this strength in both community and business leadership.

Sissie's important lessons:

1. On female leadership: Never think about being a “woman leader” — just a leader.
2. On family business: Have all family members start at the bottom. They must understand what they'll be asking people to do.
3. On powering through a recession: Make cuts hard, deep and fast. This diminishes fear among the employees that remain.

By her example, Sissie has instilled a culture of integrity in her third-generation business, which she's grown — despite the 2008 recession — into the largest HVAC provider in Arizona.

 **HEAR MORE**



Chuck Tapert

Lifetime Achievement Award

President & CEO | StoneTapert Insurance Services

Chair: Nora Paller | Member since 1998 | CE 58

When the Affordable Care Act was moving through Congress, Chuck Tapert devised a new business model to help people understand and get coverage under a new mode of health care. It's just one example of many demonstrating his commitment to serving the community.

At the helm of one of the largest and most respected employee benefits firms in Southern CA, Chuck has these trade secrets to share:

1. Don't pretend you have the answers.
2. Make a point with gentle humor, rather than judgment.
3. Maintain high standards and commitment to customers in good times AND bad.
4. Take care in forging relationships.

Chuck has exemplified the Vistage values of Trust, Caring, Challenge and Growth for 21 years and counting.

 **HEAR MORE**



Gary Wichansky

Impact Award

CEO and Head of Creative | Hotopp Associates
Chair: Kevin McKeown | Member since 2016 | CE 4807

“When I think back on what I really enjoyed about being an artist ... it was taking that creative skill set and getting a group of people together to work on it.” Gary Wichansky is a born artist, and a born leader. The Hotopp Associates CEO transformed an award-winning design firm into a profitable one, growing revenue 10x in two years.

Crediting his Vistage group with giving him “language for all the things I was trying to say,” Gary established strategy and culture that support Hotopp’s creative minds.

His tips:

1. Shift from doing the work, to really leading the company.
2. Lean on others, and inspire them to follow suit.
3. Leadership takes honesty, transparency, vulnerability and willingness to learn.



Leonard Brody

 Speaker

Business and technology visionary
The great rewrite

We are living in a unique moment in history, with revolutionary change occurring at a frenzied pace. How can you survive in a world that’s being rewritten around you?

Harness uncertainty and turn it into excitement, innovation and success by keeping in mind:

1. Influence matters more than ever before. Create meaningful, value-driven marketing content.
2. Employee retention is your marketing metric. Stand for something. Have clear objectives on how to get there.
3. Operationalizing innovation must be a matter of priority.

Leonard Brody is an entrepreneur, venture capitalist and two-time Emmy nominee. He is co-author of two best-sellers, and is currently writing “The Great Rewrite” in partnership with Forbes.

 **HEAR MORE**



Joe Galvin

 Speaker

Chief Research Officer | Vistage Worldwide, Inc.
CEO decision factors

Apply these perspectives — based on analysis of data from the Vistage CEO Confidence Index survey — to your decision-making for the coming year.

1. Dark clouds are getting darker: The economic slowdown adds caution to CEO confidence.
2. Uncertainty is the new normal: Be mindful of how policy impacts your business.
3. Talent management: Talent shortage is the biggest threat to growth.
4. Customer engagement: When selling into a slowdown, adapt to the new buying dynamic
5. Business operations: Transform your business with technology.
6. Financials: Measure your Rates of Change (RoC), it's your business blood pressure.
7. Leadership: Culture is your organizational gravity. Create it deliberately.

As Chief Research Officer for Vistage, Joe Galvin provides Vistage members with the most current, compelling and actionable thought leadership on the issues and decisions of SMB CEOs.

 [HEAR MORE](#)

Not the cry, but the flight of a wild duck, leads the flock to fly and follow.

– Chinese proverb



Lifelong learning

“

Earn your leadership every day.”

– Michael Jordan



Greg Armstrong

Impact Award

President & CEO | WEDGE Group

Chair: Fredricka Brecht | Member since 2017 | CE 3627

“What is the legacy I want to leave behind?” When Greg Armstrong was named CEO of WEDGE Group, the company culture needed significant attention. Recognizing change would start from within, Greg committed to radical transparency and worked to establish trust, leveraging rigorous internal discovery to establish The WEDGE Way — a set of core values that forged a path to double-digit growth.

Keys to architecting The WEDGE Way:

1. Utilizing tools from “Five Dysfunctions of a Team” by Patrick Lencioni.
2. Adopting EOS and creating a culture committee.
3. Letting go of those who could not embrace the new culture.
4. Asking for help in lieu of self-blame.
5. Creating an exciting place to work, about more than just the work.

 **HEAR MORE**



Dave Arnold

Impact Award

President | Royal Engineered Composites

Chair: Cathy Fitzhenry | Member since 2013 | CE 03678

“I never expect to get to the top of the mountain and feel like I am done. There will always be more work to do to be better.” An engineer by education and discipline, Dave Arnold has a gift for seeing the black-and-white. As president of Royal Engineered Composites, he also demonstrates high EQ in his tireless dedication to helping team members reach their next level.

Dave’s tips:

1. Build your knowledge base. Surround yourself with supportive people.
2. To lead, you need to grow beyond your technical understanding.
3. Remove ego. Allow failure to steer you to where you are meant to be.
4. Be attuned to what is coming down the pike.
5. Define expectations for your team. Formally map the development process.

 **HEAR MORE**



Sharon Bloodworth

Lifetime Achievement Award

CEO | White Oaks Wealth Advisors

Chair: Frank Solomon | Member since 2008 | CE 311

"It is not my goal to be the biggest in my industry, but it is my mission to be the best." Sharon Bloodworth is CEO of the largest independent, wholly woman-owned investment firm in Minnesota and Florida. She braved significant personal risk to buy out the founder of White Oaks, buoyed by her Vistage group to take on the challenge with gusto.

Here are some carrots of wisdom she's learned along the way:

1. Find out how you are different. It's the biggest key to success.
2. Swim in your own lane. Do not look at others.
3. Be bold. Lean on your group for support.
4. Learn from watching failures as much as successes.
5. Vistage means you do not stand alone.
6. The road to success is paved with hard decisions.

 **HEAR MORE**



Ron Fornaca

Lifetime Achievement Award

General Manager | Frank Motors, Inc.

Chair: Robert McRann | Member since 2012 | SB 804

At the helm of San Diego's oldest family business, Frank Motors Group, Ron Fornaca uses the wisdom of experience to guide his decision-making. Shaped by challenges in his family's century-old bakery, Ron practices patience when weighing growth opportunities. A key piece of advice? "Sometimes the best deals are the ones you don't make."

More advice from Ron:

1. Assess opportunities by asking, "Is this part of what we want to be?"
2. Timing is everything. Don't be afraid to sit back and wait.
3. A trusted team is more important than making more money.
4. Growing bigger is not always better.
5. One person should not be making all of the decisions.
6. Consider family dynamics before employing the next generation.



Malcolm Frost

Leadership Award

President & CEO | HR Ledger, Inc.

Chair: Amelya Stephenson | Member since 2014 | SB 2373

“What makes me a good leader for my company? I love to learn.” After serving as CTO for eight years, Malcolm Frost assumed the role of HR Ledger, Inc. CEO after unexpected tragedy struck. Taking on a role he didn’t feel 100 percent prepared for, Malcolm found vulnerability and an open mind imperative to his success as a leader.

Willing to learn from mistakes and committed to transparency, Malcolm increased his market segment, resulting in 16 percent growth quarter after quarter.

On his leadership journey, he has learned:

1. Be proud of what you HAVE built and not ashamed of what you haven’t.
2. Worrying about what people think gets in the way of true growth.
3. Develop your vision organically over time.

 **HEAR MORE**



Joe Gehrke

Impact Award

President | Kesslers Diamonds

Chair: Matt Mickle | Member since 2017 | CE 10033

How do you step into the larger-than-life shoes of a family business founder and remain true to your own leadership style? Known for his “carefrontational” approach, Joe Gehrke deftly made the leap from banking to the emotionally charged retail industry when appointed president of Kesslers Diamonds.

Building relationships and earning trust, Joe became leader and visionary for the company — without alienating senior personnel and key staff.

His mindset:

1. Don’t try to be someone you’re not.
2. Slow down to go faster; take time to absorb the culture.
3. Demonstrate how changes will positively impact the operation.
4. Look for wisdom wherever you go.
5. “Understand first, be understood second.” (Stephen Covey)



Clay Grubb

Impact Award

CEO | Grubb Properties

Chair: Bob James | Member since 2016 | CE 4675

Bringing new meaning to “lifelong learning,” Clay Grubb was just 12 years old when he began specializing in residential mortgage collections at his family business. Since Clay assumed the role of CEO in 2002, Grubb Properties, Inc. has completed more than \$1B in real estate investment transactions while never wavering in its commitment to integrity, customer satisfaction and continuous improvement.

At the heart of Clay’s success? Transitioning the business from family-owned to board- and employee-owned.

Integral to this effort:

1. Encouraging employees to vocalize their opinions.
2. Aggressively protecting team culture at all costs.
3. Setting up a process that enforces accountability through the C-level.

 **HEAR MORE**



Richard “Rick” Sanchez

Lifetime Achievement Award

Founder & EVP | Education Solutions Services

Chair: Scott Reeves | Member since 1991 | CE 04639

Humble. Wise. Kind. This is how peers describe Rick Sanchez. Rick got his start as a cleaner for his family business. His most recent venture, Education Solution Services (ESS), has grown from start-up to staffing powerhouse, earning hundreds of millions in revenue and providing 40,000 educators to more than 2.5 million students nationwide.

Here Rick shares hard-earned wisdom:

1. Build your plan with confidence — on paper.
2. If your plan includes an exit, do it with purpose.
3. Surround yourself with trusted advisory people.
4. Build a thriving organization and culture of success, by building others up.
5. Don’t be too quick to judge. It takes investment and coaching to get people to achieve what they are capable of.

 **HEAR MORE**



Ken Trainer

Lifetime Achievement Award

Chief Operations Officer | Chesmar Homes

Chair: Charles Marino | Member since 2010 | CE 3728

Ken Trainer credits his success to constantly reinventing himself. In a volatile industry, he has a talent for staying ahead of change and getting people on board with his vision. "Create a strong enough direction and the naysayers will fade away," he says. As COO, Ken has led Chesmar Homes to explosive growth in profits and workforce. He approaches business with clear-eyed realism: "Focus on doing the best you can do, based on the conditions."

His advice to CEOs:

1. You can't always grow, but you can always make your business better.
2. Be a student of your people. Learn their jobs and what they need to be successful.
3. Reinvent the idea/behavior before the company needs it.
4. Change your thinking first.



Dave Mattson

 **Speaker**

CEO & President | Sandler Organization

Blind spots and how to avoid them

Elevate your company's performance by anticipating your blind spots.

Here are the top 13 faced by organizational leaders:

1. Not having a hiring process.
2. Improperly onboarding.
3. Failing to tie corporate goals to personal.
4. Not creating a culture of accountability.
5. No common sales language.
6. Not focusing on lead gen.
7. Not capturing best practices.
8. Failing to coach management staff.
9. Not building the bench.
10. Not knowing how to coach.
11. Not sharing the vision with key stakeholders.
12. Fostering a culture of learned helplessness.
13. No methodologies and systems.

Dave Mattson is CEO and president of the Sandler Organization. He is a best-selling author and leader of training events worldwide.

Entrepreneurial instinct

“

The best way to predict the future is to create it.”

– Peter Drucker



Jim D'Amico

Lifetime Achievement Award

**Founder, Former Owner and President |
Coolfront Technologies**

Chair: Tom Merkel | Member since 2008 | CE 0048

Jim D'Amico guided his company into the digital era. Disrupting Coolfront's status quo by launching a pricing app — to nonexistent sales — Jim stayed the course and led Coolfront into a future of strong, software-driven revenues.

His words of wisdom:

1. Hard work trumps intelligence, but hard work without process ends in chaos.
2. Leaders set the standard for acceptable behavior.
3. Pay attention to changes in your industry. When in doubt, follow your gut.
4. There is no substitute for planning ahead.

Jim recently sold Coolfront, with paramount concern for his people. Seeking a buyer who would stay local and keep the team intact, Jim got his ask — Coolfront remains in Rochester with many of the same employees.



Todd Bendis

Impact Award

CEO | Lake City Plating

Chair: Jim Mazzella | Member since 2016 | CE 320

When Todd Bendis became CEO of Lake City Plating, he was new to the business and to the industry. Driven by vision and a mindset of lifelong learning, Todd's people-focused, systematic approach to leadership has brought the company to the brink of dynamic growth. With two acquisitions in the past year, Lake City Plating is seen as the preferred partner to its target customers.

Todd's M&A tips:

1. Start developing relationships early. If opportunities arise, the seed has been planted.
2. You can't make people WANT to sell their business.
3. The M&A process is so much about trust.
4. There is no risk in being up-front. Few are offended by that.

 **HEAR MORE**



Paul Esch

Lifetime Achievement Award

CEO | CVC Holdings

Chair: John Tidgewell | Member since 2002 | CE 37

CVC Holdings has come a long way from its flagship office — in Paul Esch's garage. Paul looks back at his thriving company's history and points to one constant theme: Change. "Adjusting, learning, changing is so critical to long-term sustainability," he says.

Over the decades, Paul has changed a lot of things, from the way he pours concrete to his own role in the company. "I was wearing too many hats," he admits. More efficient job costing, sales pipeline analysis and an employee incentive program are other ways Paul has equipped CVC for success.

His advice for growth:

1. Hire people who are better and smarter than you.
2. Never jeopardize people's trust.
3. If it doesn't fit your values, don't do it.

 **HEAR MORE**



Steve Folsom

Impact Award

President | Folsom Properties

Chairs: Jim Brewer and Dean Sung | Member since 2015 | CE 4596

When the 2009 recession disrupted the real estate industry, Steve Folsom leveraged the harsh lessons of the late '80s recession to help his family business maintain a solid footing. By choosing financially conservative projects and agreeing to negotiate with hard-hit tenants, Folsom Properties emerged a step ahead of the competition, well positioned to pursue new development opportunities.

Steve considers his company's growth options deliberately:

1. Use equity and low leverage on every project. "Don't get yourself out over your skis," he says.
2. Diversify your assets.
3. Consider new kinds of business partnerships. When high-rent tenants were thin on the ground, Steve looked to more reliable retail partners.



Jeff Jahn

Impact Award

CEO & Chief Nerd | DynamiX

Chair: Shaun Bradley | Member since 2017 | CE 5635

Before Jeff Jahn's web development company, DynamiX, touches a line of code, its clients understand what success is, and the mutual plan forward to achieving it.

Jeff's team lives its brand standards by:

1. Only taking on jobs it is passionate about. Either "hell YES" or "hell NO." No in-between.
2. Not doing a traditional RFP process, rather interviewing clients as if hiring them.
3. Only taking on clients pushing to be the best, who trust DynamiX to help them achieve it.

DynamiX is the most-awarded web development company in the U.S. Jeff Jahn started the company in his dorm room and honed his leadership skills on the job — going so far as to fire himself to help his business thrive.

 **HEAR MORE**



Stephen King

Leadership Award

President & CEO | GrowthForce, LLC

Chair: Robin Stanaland | Member since 2014 | SB 812

Steve King has a passion for helping businesses reach their growth potential. He's put his deep financial and fundraising knowledge to work for his Houston-based start-up, growing the business sustainably and profitably. Steve's hard-earned wisdom and dedication to the community empower GrowthForce to provide particular support to nonprofits, which now make up 35 percent of the company's business.

Steve's tips:

1. You can't just have a financial management strategy. You must also have a human capital strategy.
2. The best organizations put good data in the hands of decision-makers.
3. Manage growth so you don't need outside capital.
4. Have a laser focus on profit. Only take jobs that are going to be profitable.

 **HEAR MORE**



Louis Merryman

Lifetime Achievement Award

President | Consolidated Glass Corporation
Chair: Andy Aloe | Member since 2007 | CE 411

In 2000, Louis Merryman of Consolidated Glass Corporation (CGC) saw 60 percent of his commerce move to overseas markets and many of his competitors go under. He had to act quickly to survive, investing in equipment, targeting a new client base and shifting his business model. "It was a leap of faith. Desperation leads to a lot of creative thinking," he says. The leap paid off. Louis leveraged CGC's hard-won stability, galvanizing his company by investing in a young, motivated workforce poised to learn from the tribal wisdom of his tenured staff.

Louis' lessons for surviving change:

1. The company leader sets the cultural tone.
2. To thrive, stay agile.
3. Empower your team to take ownership of their success.

 **HEAR MORE**



Allison Stevens

Leadership Award

CEO | Powernet
Chair: Jamie Overbey | Member since 2014 | CE 4002

When the explosion of cell phone technology disrupted the long-distance industry, Alli Stevens treated challenges as opportunities. Focusing Powernet's energies on providing local businesses, schools and neighborhoods with improved access to cutting-edge innovation, she raised the company's image organically — and authentically.

Alli's team-first leadership style is about far more than tech:

1. Put people first and success will follow.
2. Focus on purpose. Great people want to work for an organization that does more than just make money.
3. Do something that matters.

Powernet's truly free public Wi-Fi networks give low-income residents an opportunity to find jobs, continue education, pay bills and persevere.

 **HEAR MORE**



Todd Buchholz

 Speaker

Economist

Prosperity ahead — or not? Flourishing in the new economy

Never before have businesses felt such excruciating pressure to compete. The go-go days of the 1990s turned into the go-sideways days of the 2000s. How can your company survive and thrive?

Pay careful attention to:

- How demographics, technology and globalization are reshaping the economy.
- The signs of stock market rallies, and the warning signs of slumps.
- Political pressures on trade, debt and interest rates.

Todd Buchholz brings his experience as a former White House director of economic policy, managing director of the \$15B Tiger hedge fund and Harvard economics teacher to the cutting edge of economics, fiscal politics, finance and strategy. His past audiences include IBM and the U.S. Chamber of Commerce.

 [HEAR MORE](#)



Gerry O'Brien

 Speaker

Business growth & change expert

Becoming the #1 choice in a crowded market

Leaders must make a critical decision in this time of constant change: Embrace it.

Commit to these four criteria to inform business success:

1. Who are your ideal customers? Don't try to be all things to all people.
2. What are your customers looking for? There is an emotional component to every decision.
3. What's your outcome? Customers seek to buy the outcome.
4. What's your BECAUSE? What do you do that's unique — that will inspire belief in the outcome you've promised?

Gerry O'Brien is creator of "The Power of BECAUSE," a business framework that reveals why customers buy and how they make referrals. A growth strategy expert, Gerry has helped thousands of CEOs navigate disruptive change.

 [HEAR MORE](#)

A hand is shown gripping a wooden ladder, with the ladder extending upwards. The background is a textured blue surface. The text 'Unwavering drive' is overlaid in white, with a yellow horizontal line underlining the word 'drive'.

Unwavering drive

“

I attribute my success to this: I never gave or took an excuse.”

– Florence Nightingale



Gary Butler

Leadership Award

President/CEO | Precision Custom Components, LLC
Chair: John Dame | Member since 2013 | CE 3176

Gary Butler has a reputation for creative problem-solving. During the last economic downturn, he saved his company, Precision Custom Components — and his employees' pensions — when lesser CEOs would have given up. An engineer by training, Gary negotiated novel financing and tax relief solutions with insurers and the IRS to take his firm from the brink of bankruptcy, to a leader in military and nuclear manufacturing.

Gary's leadership tips:

1. Make sure your team understands the vision and broad strategies for achieving it. Then get out of their way.
2. Get the right people in the right positions.
3. Don't operate in isolation. Keep people informed.
4. Offer your opinion, not all of the answers.

 **HEAR MORE**



Martin Faith

Lifetime Achievement Award

Founder & President | Scottish Group Companies
Chair: Greg Behm | Member since 2014 | CE 2787

Martin Faith came to the U.S. with a plan, resolve and not much else. Starting as an importer and restorer of antique stained glass, Martin learned how to make stained glass himself, parlaying that craft into three successful businesses (Scottish Group Companies). With no formal business education, Martin rolled up his sleeves, sought advice and persevered. Today, his creativity and glass design skills are on display in over 20,000 homes throughout the country.

Martin's advice:

1. Have people you can talk to who understand what it's like to lead a company.
2. Have peers that ask questions, to find things you may have missed.
3. Find ways to connect with other businesses as a means for growth.



Bryan Hill

Impact Award

CEO | Rehab United Sports Medicine & Physical Therapy
Chair: Alan Sorkin | Member since 2017 | CE 3494

Bryan Hill and his brother started Rehab United in their garage, without so much as a business plan. As years passed, the business was surviving — but its team was miserable. “You can’t grow if you have to make all the decisions,” Brian recalls. “I was the dam of the company. I was the one holding us up.”

Brian’s lessons in letting go:

1. What’s best for the growth of the company is not about what is best for you personally.
2. Recognize the role you had in making things bad, and the role the team has in making it better.
3. Stop talking so much. Start listening.

Rehab United has since been named a “Best Place to Work” by the San Diego Business Journal, and a top company culture by Entrepreneur magazine.



Dan Kalafatas

Leadership Award

CEO | 3Degrees
Chair: Erin McGrath | Member since 2011 | CE 3325

Described by peers as “the epitome of a leader,” Dan Kalafatas has made it his mission to build the renewable energy sector to address climate change. He co-founded 3Degrees to help corporations go green. As chairman, he has overseen the company’s biggest year yet. From developing energy-efficient strategies to connecting more than 275,000 residential customers to renewable energy, Dan has faced significant trials along his path to success.

His key lessons:

1. Good governance is essential to instilling accountability.
2. Properly capitalize the business to align your business plan, culture and profile.
3. Construct a personal support system.
4. Move from a “superman model” of leadership to one more contemplative.

 **HEAR MORE**



Chris Loeffler

Impact Award

CEO | Caliber

Chair: Conrad Prusak | Member since 2016 | CE 590

How do you become an investor, if you don't have any money? That question may stop others in their tracks, but not Chris Loeffler. As a young, first-time CEO, he fearlessly challenged the real estate status quo, helping others grow their wealth through hands-on, highly transparent development opportunities.

Here is a glimpse of the ethos that continues to propel Chris' success:

1. Commit to moving forward. Things will start happening for you if you stick it out.
2. Everything starts and ends with the people you work with.
3. NEVER STOP DOING BUSINESS.

Chris' customer-first strategy has landed his firm, Caliber, on the Inc. 5000 list of "Fastest Growing Companies" four years running.

 [HEAR MORE](#)



J. Fielding Miller

Leadership Award

CEO | CAPTRUST Financial Advisors

Chair: Chris Quinn | Member since 2016 | CE 5685

Among his peers, J. Fielding Miller is known as giving, humble and decent, and is noted for his reliable willingness to help others. As the co-founder of CAPTRUST Financial Advisors, Fielding is known for his consistently deliberate big-picture growth strategy, which steered the company to become one of the largest independent financial advisory firms. His reliable and prudent stewardship resulted in his company's regular acquisitions, all while reinvesting half of its annual profit into growth opportunities.

His success strategy:

1. Be guided by the best interest of your client.
2. Be a valued partner to your customers beyond just financial advising.
3. Demonstrate teamwork and a unified mission.

 [HEAR MORE](#)



Matt Stalsberg

Leadership Award

Owner & General Manager | Ace Disposal and Recycling
Chair: Denny Thurman | Member since 2014 | CE 04224

It's hard for a young legacy manager to gain the level of respect needed to truly run a business. Matt Stalsberg earned it. Matt came up through the ranks of ACE Recycling and Disposal, working every position before assuming the role of GM.

Imperatives to his success as leader:

1. Teamwork and collaboration bring success for all.
2. Never forget who helped us get to where we are today.
3. Provide the highest level of quality service at reasonable and fair rates.
4. Cooperate with communities to improve quality of life.

In his years as a Vistage member, Matt has grown the business from \$35M to over \$60M. His team takes pride in work and community, an authenticity that sees customers returning year after year.

 **HEAR MORE**



Susan Stieber

Impact Award

Franchise Owner | European Wax Centers
Chair: Brett Sargent | Member since 2015 | CE 5659

Susan Stieber wants to create “the ultimate experience for our guests” at her European Wax Center franchises. In pursuit of that goal, she invests in her staff’s professional development and enrichment, creating a growth-oriented culture of learning and sharing. She and her husband and children work daily in the business, bringing contagious enthusiasm and passion for customer service and employee empowerment.

Susan’s leadership style includes:

1. Working side by side with employees.
2. Active involvement in daily operations.
3. Establishing personal roots in the community.
4. Developing company culture by living your values.

Susan started with one location in 2009. She now has nine, with more on the horizon.

 **HEAR MORE**



Ken Stober

Lifetime Achievement Award

CEO/Owner | Mueller Custom Cut Solutions

Chair: Terry Dunn | Member since 2001 | CE 98

Ken Stober's agility in dealing with change and commitment to company culture see his company voted a top place to work in Charlotte year after year. From adeptly navigating entry and exit from business in China to constantly questioning the status quo.

Ken's wisdom is hard-earned, proven and includes the following:

1. The pace of change is getting faster and faster. If you're not changing, you're going to fall behind.
2. It's hard to be both tactical and strategic, at the same time. Empower your leadership team so you can spend time working ON the business.
3. Be an AND person, not an OR person. Strive for a team of AND people.
4. Don't stay with a decision for too long because you can't let go.

 **HEAR MORE**



Alex Chausovsky

 **Speaker**

Director of Speaking Services | ITR Economics

Navigating the crest: Acute insights for improved decision-making

How can business leaders set effective growth targets in an uncertain economic environment?

Start implementing these actions:

1. Track your rate of change to identify where you are in the business cycle. Make strategic decisions that correspond to your business cycle phase.
2. Identify and leverage input from a system of leading indicators that foretell how the macro economy and your specific markets will behave.
3. Have your management team develop and implement a strategy that allows the business to outperform the baseline.

ITR consulting services and presentations provide the best economic intelligence to reduce risk and drive practical and profitable business decisions.

Additional resources

Sponsors are critical to the success of the Vistage Executive Summit, attending as exhibitors and subject matter experts. With several tiers of participation, it's an unparalleled opportunity to forge lasting business relationships.

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Vistage events are the definition of a target-rich environment. I recently had four members who sponsored a Vistage Executive Summit and were very happy with the results. The reality is, their salesforce spends most days trying to get in front of the very types of people who attend our events.”

– Shaun Bradley | Vistage Chair



National Sponsor

TalenTrust

How can you ensure finding and keeping great people is a business imperative?

Stop treating recruiting like a tactical, one-time event. Instead, establish an ongoing, strategic talent process that:

- Treats recruitment like sales. Leverage your employment brand to build a pipeline of qualified candidates, so you'll choose from the best people now and in the future.
- Sources passive candidates. Use numerous sources to identify the most qualified potential hires, including those not actively searching.
- Engages candidates. As in sales, create 8-12 compelling touchpoints for prospective hires, using email, text, phone, social channels, etc.
- Considers the latest trends in talent and culture. With nationwide talent shortages, a market-based approach is more critical than ever. Download the 2019 Hiring Guide for insight.

Not your typical search/recruiting firm, TalenTrust offers outsourced strategic recruiting and human capital consulting, working in partnership with Vistage members to fill key roles and solve business problems.

 **HIRING GUIDE**



National Sponsor

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ASSET PROTECTION ATTORNEYS

How can you protect your business and personal assets from any and all lawsuits and financial threats?

1. Title your business correctly.
2. Transfer assets currently in your personal name into protective entities.
3. Understand the difference between asset protection and estate planning.
4. Incorporate your entire financial team in your planning.
5. Liability insurance alone is not enough.
6. Make sure your planning fits all of your financial goals (financial planning, taxation, estate planning, business succession planning, and asset protection).

The Presser Law Firm, P.A., Asset Protection Attorneys is a nationwide asset protection law firm, specializing in helping both individuals and businesses in connection with the establishment of comprehensive asset protection plans that incorporate domestic and international components.

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Nominate a fellow member for next year's Member Excellence Awards. Reach out to your Chair to learn more.

We are thrilled to be on this journey with you, and are endlessly inspired by your efforts to strengthen your leadership. Vistage member CEOs do things differently, with an impact that resonates from business, to community, to the world.

You are leading the way – together.
