CEO & C-SUITE FORUMS
“Vanguard creates intimate top leadership conversations, about things that really matter.”

David Pyott
Chairman, London Business School
Board member, Philips
OVERVIEW
Leadership Forums
Takeaways

- **Advisory leaders and their teams face unprecedented challenges** today, from hybrid working to board pressures. The forums help top leaders address these challenges with some of the best advisors available: their peers, executives from the firm, and Vanguard’s team.

- **The Leadership Forums also provide top leaders with access** to other C-suite experts in our networks, and to others including our advisors. This is a priceless resource versus traditional paid consultancy.

- **The Forums** are grounded on leadership work by us with 1,000+ CEOs and C-suite executives. They’re pressure-tested.

- **Top leadership effectiveness** is the single most important driver of high performance (*Ram Charan, McKinsey, Bain*).

- **Great leadership is a scarce commodity.** The forum will give the firm a competitive edge in attracting and retaining talent at the top.

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**Leveraging Vanguard’s 10 years of experience catalyzing high-performance at the top**
Leadership Forums: How They Work

- **You** identify the individuals you want to align, develop, network
  - Select Partners and their teams?
  - Partners across the firm?

- **Vanguard** takes your brief to create a cadence of face-to-face and virtual sessions designed to build needed leadership capabilities, centered on EQ—and create valuable networks within the firm
Leadership Forums: How They Work

- **Vanguard** convenes and runs the program, moderates the sessions, creates and issues a "playbook" of key takeaways from each session and curates value-adding elements (e.g. leadership video and other content)

- **Session leaders** enhance peer-to-peer development at each session (see slide 7 below for examples of potential session leaders)

- **EQ development, sharing of best practices, and candid assessment** of shared challenges are foundational elements for all the sessions
Step Inside the Vanguard Experience
Short Video Highlights

Case Study: The Ugly Side of the Beauty Industry

The Life Sciences Forum for CEOs
Leading Through Complexity

Case Study
Click to view
The Ugly Side of the Beauty Industry

Insights from Participants
Click to view
Leading Through Complexity
DEEPER DIVE
Session Topics

Session topics selected and sequenced to align with the firm’s leadership priorities and goals

**EXAMPLES**

- Self awareness
- Working with the Board
- Building and leading a high-performance executive team
- Creating a compelling sense of purpose and a powerful culture
- Managing conflict
- Empathy and interpersonal relations
- Agenda setting and management
- Self management
- Strategic thinking and strategic planning
- Prioritization

- Agility
- Delegation
- Earning trust
- Vision and sense of purpose
- Diversity and inclusion
- Time management
- Teamwork and team leadership
- Cross functional working
- Goal setting and delivery
- Turning strategy into execution
- Continuous learning and growth
- Accountability and self-discipline
- Executional excellence
### Session Leaders
#### Potential Leaders from Vanguard’s Network

- **Carrie Cox**, Chair, Organon
- **David Pyott**, Chair, LBS; Philips Board
- **Mary Ann Hynes**, Senior Counsel, Dentons
- **Ram Charan**, Global Adviser to CEOs & Corporate Boards
- **Tom Sabatino**, 9x Fortune 500 GC
- **David Rock**, CEO NeuroLeadership Institute
- **Paul Hastings**, CEO, Nkarta
- **Jed Berger**, President, Kenneth Cole
- **Lisa Shalett**, Co-Founder, Extraordinary Women on Boards
- **Tom Rath**, Creator of Strengthsfinder 2.0; best selling leadership author
- **Matthew Harrington**, CEO, Edelman Worldwide
- **Marc Lefar**, Former CEO, Vonage
- **Jeremy Heimans**, CEO, Purpose; author of *New Power*
- **Karen Reivich**, Principal, University of Pennsylvania Resilience Training Program; Architect of US Army Psychological Fitness Training
Sample Curriculum

Repeat interactions over a period of time have especially high-value impact. Frequency and format are completely flexible.

Month 1: ½ day face-to-face module; 5 sessions followed by reception & dinner
Month 2: 90-minute virtual module
Month 3: 90-minute virtual module
Month 4: 90-minute virtual module
Month 5: 90-minute virtual module
Month 6: ½ day face-to-face module; 5 sessions followed by reception & dinner

* Each module is followed by a “Playbook” summary of the discussion
* Each module is followed by an installment of relevant leadership content/video/podcast
* Relevant Senior Partners at the firm may elect to serve as informal sounding boards/coaches for participants
* Vanguard can create a network of Board and C-suite leaders as informal advisors to the participants
## Sample ½ day, face-to-face module

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>12–1 pm</td>
<td>Buffet lunch and networking</td>
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<tr>
<td>1–1:30 pm</td>
<td>Introductions and review of sessions</td>
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<tr>
<td>1:30–2:30 pm</td>
<td><strong>Session 1</strong>: Fireside chat and interactive group dialogue</td>
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<tr>
<td>2:30–2:50 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:50–3:30 pm</td>
<td><strong>Session 2</strong>: Small group leadership challenge case study</td>
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<tr>
<td>3:30–4:30 pm</td>
<td><strong>Session 3</strong>: Three participants discuss a leadership issue and how they resolved it; group Q&amp;A</td>
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<tr>
<td>4:30–4:50 pm</td>
<td>Break</td>
</tr>
<tr>
<td>4:50–5:15 pm</td>
<td><strong>Session 4</strong>: “Help me solve my problem.” Small groups take turns giving and getting advice from each other on an immediate leadership problem they are facing</td>
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<tr>
<td>5:15–5:50 pm</td>
<td><strong>Session 5</strong>: &quot;Looking Around the Corners&quot;: moderated dialogue around the most important leadership capability to develop for success over the next five years.</td>
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<tr>
<td>5:50–6 pm</td>
<td>Close</td>
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<tr>
<td>6–7 pm</td>
<td>Networking reception</td>
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Sample 90-min virtual module

Session Leader  David Pyott; Chair, London Business School, Philips Board

Moderator  Ken Banta; CEO, The Vanguard Network

2–2:10 pm  Introductions, overview

2:10–2:40 pm  Conversation
  How can self-awareness make us more effective with clients? Our successes? Our mistakes? What we have learned?

2:40–3:20 pm  Simulation: Aligning a divided board on a critical decision
  ● Small groups of ~4 participants each decide on a course of action
  ● Session leader gives comment and feedback
  ● Group discussion: What are the takeaways?

3:20–3:30 pm  Discussion
  ● Key takeaways and action steps
  ● Proposals for topic for next module
  ● Closing comments by session leader
Investment

- Economics based on
  - Number of participants in each forum series
  - Format (virtual, face-to-face, hybrid)
  - Monthly frequency of sessions
  - Duration of the program
  - Scope of Vanguard’s organizational role (e.g. does Vanguard manage invitations, calendars, or the firm?)
  - Potential Vanguard Network session leader fees

*Expenses such as travel to be charged additionally*
### Who We Are

#### KNOWLEDGE
- Special expertise in leadership, team alignment, culture and EQ-focused change
- In-house top management roles leading 10+ complex global integrations and cultural change initiatives
- Advising on dozens more

#### EXPERIENCE
- Lean, highly experienced team focused on supporting top leaders and enterprises
- Catalyzing leadership and transformation to drive long-term high performance
- A 10-year track record of success

#### REACH
- U.S. based global team
- A unique network of ~600 Board members, CEOs, and C-suite executives across sectors and roles
The Vanguard Network
Who We Are

50 Years
Cumulative expertise implementing global change, including more than 15 mergers and reinventions

5
Core capabilities: change management, learning and development, leadership advisory, strategy and execution

400+
Country leaders and teams aligned and developed in matrix organizations

85%
Diverse: LGBTQ+ owned, black/latino/women professionals, 10 national heritages, 8 languages

35 Years
Top management experience in Global enterprises driving transformational change

20
On-staff professionals

600+
Board, CEO and C-suite members of The Vanguard Network for advice and counsel

www.thevanguardnetwork.com
What We Do

We work with leaders and their organizations to set roadmaps to enhance—or transform—how people lead and how the organization works to deliver high performance.

Then we roll up our sleeves and help make the right change happen.
How We Do It

We build ways of working, capabilities and behaviors through curriculums centered on peer-to-peer interactions and collaboration, case studies and simulations.

We generate deep learning via engagement with senior executives from within and outside the organization.

All based on decades of success accelerating high performance leadership.
For More

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www.thevanguardnetwork.com
THE VANGUARD NETWORK
Building High-Performance Leadership

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