



# SIGNATURE SURGE

LEADERSHIP · LIFE · LEGACY

*A Year in Review*

2021  
Confidential



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# *A heartfelt thank-you*

Ladies,

What a year it has been! We put 2020 in our rearview, yet many of the challenges followed us. Despite the continued conditions 2021 presented, we faced them together, and stand stronger and wiser as a result.

This year, we were able to be back in person with two magnificent Surge Summits, in Park City, Utah and "down at the farm" near Atlanta, Georgia. And throughout the year, we maintained constant connection through our virtual sessions, small group huddles, and one-on-one connections, which I've become quite fond of as well.

When we gathered in Utah, I opened the session asking us all to think how much "Words Matter." More than ever, a single expression of support, an open query for help, a small note to share how we are thinking of each other, or suggestions for the "must-have" beauty products... these have helped fuel us along this often rocky, unstable journey.

But the word I offered in Utah to put in front of us was "remarkable."

While 2021 has been remarkable in so many ways, the support and joy this group gives to each other is the stand-out. You all are a truly remarkable group. I am personally honored to be a part of your journey. This yearbook is a reminder of the year we've had, the wisdom we've shared, and the memories we've made.

All the best,

A handwritten signature in black ink, appearing to read "Coral". The signature is fluid and cursive, with a large initial 'C' and a trailing flourish.



# Class of 2021 | MEMBERS



**Amie Benedict**  
VP, Specialty Solutions  
Cigna  
Bloomfield, CT

Member, 2020 and 2021



**Beth Appel**  
VP, Finance - Infrastructure  
Aptiv  
Dublin, Ireland

Founding Member, 2019-2021



**Camille Batiste**  
President, Global Supply Chain  
Archer Daniels Midland  
Union, KY

New Member, 2021



**Erin Bernhardt**  
GM, Eastman Performance  
Films Business  
Eastman  
St. Louis, MO

New Member, 2021



**Graziela Chaluppe dos Santos Malucelli**  
EVP, Operations, Supply and Quality  
Novozymes  
Skodsborg, Denmark

New Member, 2021



**Heather Milligan**  
SVP, Life Underwriting  
and New Business  
Lincoln National Corporation  
Greensboro, NC

Founding Member, 2019-2021



**Jen Dardis**  
CFO  
T. Rowe Price  
Baltimore, MD

New Member, 2021



**Jenni Broyles**  
VP and GM, North America & Global  
Outdoor, Wrangler  
Kontoor Brands, Inc.  
Greensboro, NC

New Member, 2021



**Katy Vu**  
CFO of North America  
Bunzl  
St. Louis, MO

Founding Member, 2019-2021



**Lee Ann Murray**  
Chief Information Officer,  
Manulife Investment  
Management Technology  
Manulife  
Boston, MA

New Member, 2021



**Leticia Goncalves**  
President, Global Specialty  
Ingredients  
Archer Daniels Midland  
Chicago, IL

Founding Member, 2019-2021



**Lisa Banks**  
SVP, Finance  
ServiceNow  
San Jose, CA

Member, 2020 and 2021





**Pascale Wautelet**  
 VP, Global R&D, Innovation,  
 Sustainability, Chairman of  
 EMEA D&I Council  
 Avery Dennison  
 South Holland, Netherlands  
**New Member, 2021**



**Sandra Harris**  
 CFO and COO  
 Tupperware Brands Corporation  
 Orlando, FL  
**Founding Member, 2019-2021**



**Selma Postma**  
 Chief Digital Officer,  
 Europe and Indonesia  
 Ahold Delhaize Company  
 Wassenaar, Netherlands  
**Founding Member, 2019-2021**



**Sinéad O'Connor**  
 Head of Group Actuarial  
 Manulife  
 Milton, MA  
**New Member, 2021**



**Susan Huppertz**  
 Chief Manufacturing and  
 Supply Chain Officer  
 Hubbell  
 Colorado Springs, CO  
**Founding Member, 2019-2021**



**Teresa Dickerson**  
 CPO and VP  
 TE Connectivity  
 Singapore  
**New Member, 2021**



**Tina Tromiczak**  
 SVP, National Account  
 Services, RPO  
 ADP  
 Atlanta, GA  
**Founding Member, 2019-2021**



**Tonya Herring**  
 SVP Merchandising  
 Giant Food (Ahold Delhaize)  
 Odenton, MD  
**Founding Member, 2019-2021**



**Tracy Kemp**  
 SVP, Chief Information  
 and Digital Officer  
 Allegion  
 Fishers, IN  
**Member, 2020 and 2021**



**Wendy Boyd**  
 SVP, Head of ABGA, Co-lead Lincoln  
 Financial Securities  
 Lincoln Financial Group  
 Philadelphia, PA  
**Member, 2020 and 2021**



**Wendy Malone**  
 VP, Business  
 Transformation GMO  
 SPX FLOW, Inc.  
 Charlotte, NC  
**New Member, 2021**



## Class of 2021 | ADVISORS



**Abbe Luersman**  
EVP and Chief People Officer,  
Otis Worldwide  
Atlanta, GA



**Ann Fandozzi**  
CEO of Ritchie Brothers Auctioneers  
and previous CEO of Abra Auto and  
Glass and Ride Group  
Board member for Trimble  
and Ghost Robotics  
Philadelphia, PA



**Carol Seymour**  
Founder and CEO  
Signature Leaders  
Cashiers, NC



**Gretchen McClain**  
President and CEO, J.M. Huber,  
Former CEO at Xylem and Former  
Chief Director at Nasa International  
Space Station  
Board Member for Ametek, Booz  
Allen & Hamilton, Hennessy IV, And  
J.M. Huber, Operating Executive at  
The Carlyle Group  
Park City, UT







**Kathleen Ligocki**

Former CEO at Agility Fuel Solutions  
Board Member For Lear, PPG, Carpenter  
Technology, Qell Acquisition Corp, Farmers  
Business Network, and Indiana University  
Foundation

West Bloomfield, MI



**Kim Greene**

Chairman, President, and CEO  
at Southern Company Gas  
Board Member for Valero Energy  
Corporation, American Gas  
Association, Gas Technology  
Institute, and Morehouse School  
of Medicine

Atlanta, GA



**Susan Suver**

Former CHRO at Aptiv  
Board Member for the National  
Academy of Human Resources

Seattle, WA





## THANK YOU TO OUR ADVISORS

As I get a chance to reflect on “Big and Small,” it stands out so true in Surge. All of you – every single one of you – has made significant contributions to our Surge ladies, through Big and Small moments. It matters not how much time you spend, but how you spend the time.

You have been there for our Surgees when they needed it most, even on weekends and holidays, guiding them on a wide variety of professional and personal challenges, giving them the needed ear to “talk out loud.” Your presence and advice helped them gain clarity and momentum.

One of our 2021 new members shared this:

*“To know that Surge was available, on the spot, when I needed thinking partners, was a huge advantage. I needed to get out of my own head, and instead of being overwhelmed and not knowing what to tackle first, I went into the week with a solid plan and expected outcomes. It worked. Honestly, the Surge access was real. So often people say, “call me anytime,” but you were there, available, and on a holiday weekend. Thank you.”*

All of you, have done so many things, Big and Small.

Sometimes we don’t realize the impacts we make until much later.

But let me assure you: while a single conversation may seem small to you, it is BIG for these ladies. Thank you from all of us! –Carol











## Dedication to

# Gretchen

*You are our "shoulder angel." No matter what Surge needs, you always find time to offer an idea or suggestion. From ideas on speakers, guests, and topics, to your thread of humor and fun ideas on WhatsApp, you have been an integral thread running through the Surge tapestry.*

*We cherish the sound advice and constant support you have provided to all of us. Every person in Surge, including every advisor, has benefitted from a conversation with you.*

*You are a dear friend and very wise Wisdom Warrior. Your influence has pushed us to where we are and will continue to move us forward. We are grateful for our time together.*







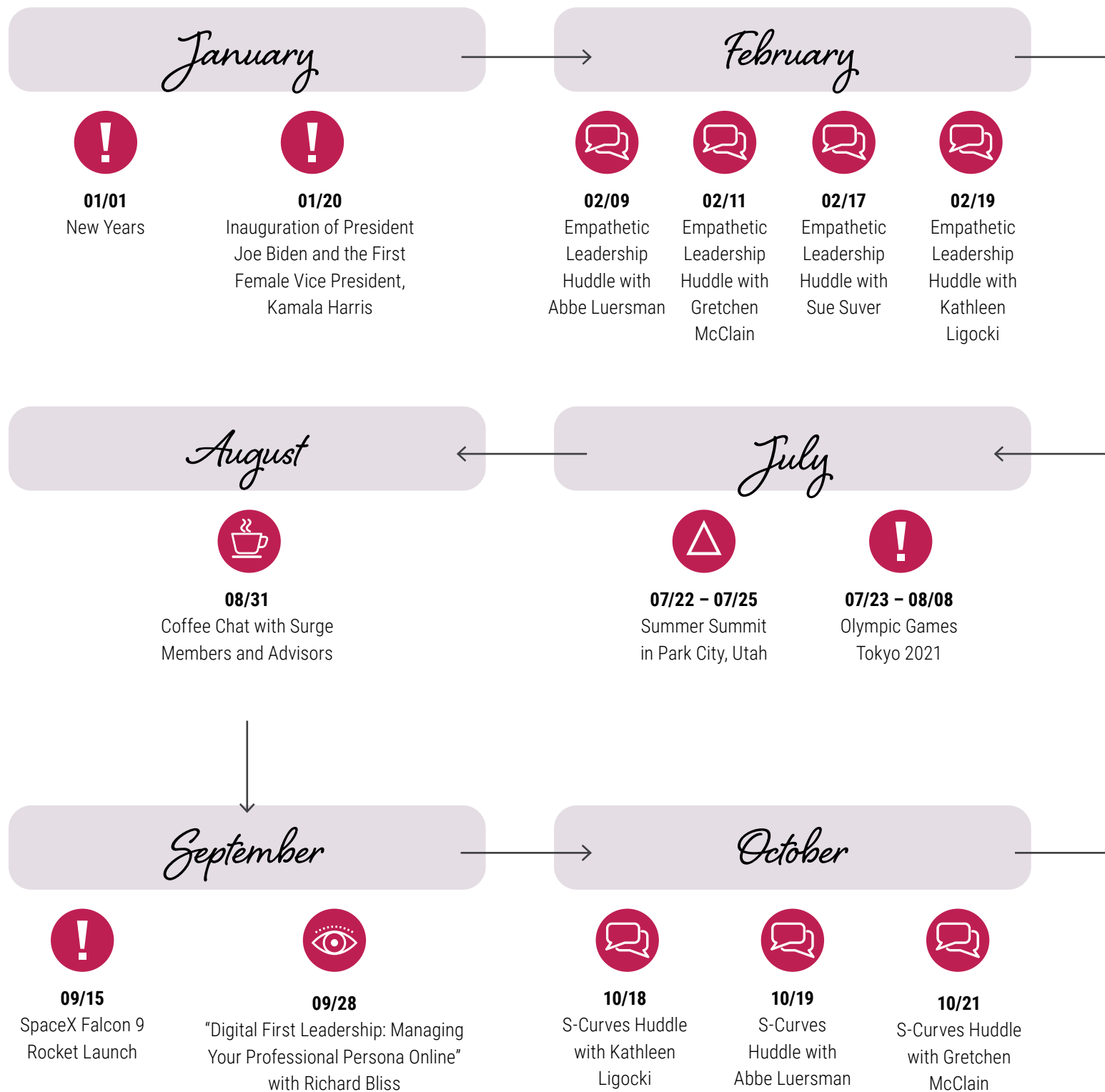
## **Toast from Leticia:**

"I want to kick us off first, celebrating Gretchen. The reason why we celebrate you, Gretchen, is when I think about leaders that made an impact in my life, you were one of them because I believe that leadership is about legacy. It is about trusting and getting the best out of people.

Every time I have had my advisory moments with you, you always got the best out of me. In those 30-minute or one-hour conversations, you built trust with me. I could feel that you're honest and authentic in our conversation. You're not just trying to use bookmarks, or things that we can read, or we can hear from others. You were really going deeper to understand my own situation and advising me using situational leadership to say, 'Here's how you need to approach this based on what you're telling me.' You're building confidence in me, and you're helping me to be my best. You always made me feel great after every conversation I had with you.

Gretchen, you have been a super support system for us, and I want to celebrate you and share, we will continue to be your support system. Let's give a toast to Gretchen."

# Our Journey Together





Summit



Huddle



Monumental Moments



Learning Session



Coffee Chat

*March*

*April*



**03/08**

International  
Women's Day



**03/18**

"Leading Productive  
Remote Collaboration:  
Clear Strategies to Emerge  
Stronger Post-Crisis" with  
Heidi Gardner



**04/29**

"One year later, Judy on her first year as CEO and  
Her Vision to Turn Otis into a High-Tech Mobile  
Transfer" with Judy Marks

*June*

*May*



**06/07**

Optimizing  
You  
Huddle  
with  
Gretchen  
McClain



**06/09**

Optimizing  
You  
Huddle  
with Abbe  
Luersman



**06/09**

Optimizing  
You Huddle  
with  
Kathleen  
Ligocki



**06/11**

Optimizing  
You  
Huddle  
with Sue  
Suver



**06/22**

Optimizing  
You  
Huddle  
with Carol  
Seymour



**05/26**

"What's in the Black Box of Board Member Search  
Firms?" with Laura Mantoura

*November*

*December*



**11/10 – 11/12**

Fall Summit in  
Atlanta, Georgia



**11/17**

"Increasing Your Competitive  
Advantage in this War for  
Talent" with Surge member  
Tina Tromiczak and team



**12/06**

"Leadership the Human Way"  
with Carol Seymour







# *Our Year in Review*





**Toast from Surge Advisor, Sue Suver:**

## *Go Slow to Go Fast*

"Some of you know that last week I got off the trail with my husband, where we spent 12 days, hiking 150 miles, on a trail that was actually walked by St. Francis of Assisi.

We were in central Italy. We started in a town called Lareto on the Adriatic Sea, and we wound our way through rolling farmlands, through forests with waterfalls and beautiful creeks. We summited mountains in the Apennine Mountain range. One day, we walked about seven miles along a section of the old Roman aqueduct through hundreds of thousands of olive trees.

I think the thing that made it so stunning is that we were hiking, which means, even if you're hiking fast, you're moving pretty slow, relative to a car. We were walking and hiking on a combination of traditional mountainous trails, old dirt-pack farm roads, and a little bit of asphalt from time to time. But it was the slowness of the journey that was the most profound thing of the entire 12 days.

On the way back to the States, it made me think that our 12-day hike was a lot like the leadership journey of business executives. You know what your end goal is, you know what your short-term goals are, and you know what your long-term goal is. You have a game plan around your people, your equipment, the skills, and the experience it's going to take to hit the target. But sometimes as business leaders, we are moving so fast to just hit the target, that we really miss the opportunity to slow it down and to enjoy the wonder, to even see the wonder of the experience and the relationships that come along with us.

That 12-day hiking trip that we took through Italy, for me, was a metaphor around the importance of needing to move quickly to do what all of you do, but also the importance of really slowing down; finding a way to get down to a walking pace, instead of a running pace or a flying pace, to make sure you don't miss the things that you can't see and you can't experience when you're moving too fast.



I hadn't been to this place [Serenbe] before. So when I got here, I thought, "Here it is again, in another form." The 'go slow to go fast' setting, which is what Surge is really all about. I think the next day and a half are going to be a wonderful way of slowing your pace down.

I know there are a lot of tugs and pulls for a lot of you around email and conference calls, and early starts and late nights, and the pressure isn't off just because you're here. But you can find a snippet of time, whether it's in a walk tomorrow morning or a short walk on your own, or just sitting outside and enjoying the environment, or making a new friendship here, or deepening a friendship with someone that you've started to get to know through Surge. I think all of those are examples of ways to slow down the pace and to make sure that, when you look back in 20 years, **when your business career is over, you won't just have recollections around what you achieved, but you'll have a lot of really memorable reflections around the journey.**

I also think this is a great environment to have the support, and the camaraderie, and the trust of this really secure, closed circle. All of you are under a political pressure, competitive pressure, time pressure. You have a lot of demands, and it's hard to find a safe place.

I think the business model that Carol's built is actually a wonderful model of trust here, in terms of letting us be the place where you can let go a little bit and ask for advice, or have a laugh, or get a hug, and build a connection.

This is our place. I encourage you to take advantage of all the time with all of these amazing women."

# Signature Surge February Huddles:

## “Empathetic Leadership” *with the Surge Advisors,* *Abbe Luersman, Gretchen McClain, Kathleen Ligocki, and Sue Suver*

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Korn Ferry CEO, Gary Burnison, posted a thought-provoking article about empathetic leadership. Leadership has been about inspiring others to believe and enable those beliefs to become reality.

However, it is not human nature to focus on developing others first. As we start a new year, how can we push ourselves in the direction of “Helping People Get an A?” Our mantra should be about the relentless pursuit of providing opportunity, mentoring, and sponsoring others. Gary tells us that we need a *radically human* approach to leadership and a set of leadership resolutions for 2021.

Here are collective insights from our conversations.

### **It starts with you.**

By knowing ourselves, we can manage ourselves first so we can positively impact others. We must first recognize our own values, strengths, motivations, and blind spots. We also need to challenge ourselves to keep the edge. We need to find time outside of the organization to be inspired, or we will hit burnout.

### **Empathy.**

There is a lot of anxiety as it relates to change. We need to acknowledge the fact that others are different from us. The more we broaden our views, the more empathetic we become. Leaders need to be empathetic and say, “Yes, we’re going to support you,” but they also need to say, “We have to start going back to ‘normal’ at some point.”

### **Empower.**

When there is a crisis, leadership goes to a more directive approach, and power rises to the top. As the crisis is passing, leaders need to disperse power and empowerment lower in their organizations, then get out of the way. The key is to amplify the importance of what employees are doing on a day-to-day basis. This will give them acceleration of their own careers, access to their senior leaders, and the ability to influence the direction of their company through the work they are doing.

### **Shepherd.**

Lead occasionally in front, sometimes beside, but mostly behind. Not leading as much from the front helps light a fire in our employees to take charge, rather than sitting back and waiting for direction or approval.

### **Be the message.**

We need to inspire others through stories. The leader IS the message. Stories allow people to internalize the message, because they often find a personal connection to it and so, it is more parabolic. The story does not need to be long, but it does need to be memorable.

*“Leadership is storytelling in a way that becomes memorable and actionable.”*

– Peter Guber

Ask yourself:

- What are the key points I really want people to take away from my story?
- What is a story from my personal life that would really drive the message home?

How we communicate our visions for the future is important. We need to paint the pictures for our teams. In previous Surge conversations, Kelly Decker taught us that only 7% of total communication are the words themselves, 38% is the way you say it - the intonation, pace, etc., and 55% is in your body language and how you show up. Passion and conviction are played out in all three. Making those obvious in this environment is going to be crucial to moving in a forward direction.

Be mindful that words really do matter. If you are talking about the Vision, emphasize this is your Vision, this is what is ahead, and come back to it often.

As *radically human* leaders, we enable others to exceed their potential, and in doing so, we will all collectively rise.

*“As the leader, don’t tell people what to do – instead, tell them what to think about.”*

– Gary Burnison



# “Leading Productive Remote Collaboration: Clear Strategies to Emerge Stronger Post-Crisis”

*led by Distinguished Fellow at Harvard Law School, Heidi Gardner*

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*Background: Heidi Gardner and her research team have identified seven behavioral dimensions associated with Smart Collaboration. Surge members took the Smart Collaboration self-assessment tool to understand their own tendencies on each of the seven dimensions and how to leverage these for more effective virtual collaboration.*

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**Smart Collaboration** is a business imperative arising from two trends that began surfacing in 2008: “expertise specialization” and a constantly changing environment (VUCA). You can’t solve more complex problems, if you have narrow and deep expertise, unless you can collaborate with people who have different knowledge bases and can bring those different behaviors and skills. **This is SMART COLLABORATION.** It is figuring out whose expertise is critical and necessary and pulling them in at the right time... and equally as important, letting them go at the right time.

The Collaborator tool does two things for you: it helps illustrate your particular collaboration strengths across 7 dimensions (illustrated on the next page); and it points out where you need to have other, diverse thinkers and complementary strengths in the room.

*During small group discussions, four member examples were given:*

**Robin Boren** cited she had a group of “responders” who are concrete thinkers, and she realized she was trying to get them to be more like her: a complex, hands-off, and trusting leader. “But my hands-off approach and lack of direction were not working, and they needed a bit more process and steps. It didn’t help that they were stressed and likely retreating to their most natural tendencies and that I was pushing too hard to get them out of their comfort zones.”

**Teresa Dickerson** shared she was High on the dimension of “hands-on,” wanting to control the environment and the message. With a Resin crisis in the marketplace, Teresa wanted to have all the conversations herself, with each stakeholder, so she could control the message and see the reaction. She was realizing she was taking on too much. She was not delegating or allowing her people to develop. One suggestion from Heidi was to find a close ally who had

complementary dimensions who could take on some of the work so Teresa could do what she does best.

**Lisa Banks** cited her company moving into more M&A work, and they were fairly new at it and trying to build the capabilities. Lisa, representing Finance, is hands-off until something goes wrong, then she is hands-on. She understands that building a framework for their collaboration, acting more as the bridge between the accounting group, who demonstrate very concrete behaviors, and the corporate development group, whose behavior is complex, can have positive outcomes.

**Katy Vu** shared that her situation was different than Lisa’s; whereas Lisa’s had opposite ends of the behavior spectrum, Katy’s had everyone on the same end. They lacked diversity, and with the behaviors edging on risk-seekers and hands-off, things could go really wrong. Katy realized she needs to pull herself into more hands-on and to get a seat at the table earlier to help head off issues that may arise.

As Heidi wrapped up, she emphasized the value of Smart Collaboration for your businesses. If you are serving clients with multiple product lines or services, they get more value and pay more money. You get more profit when you are integrating your solution for the client versus when you are serving different products for different units. One CFO client said, “When we have providers who are giving us something far more powerful than just siloed solutions, where we have to play the integrator, it is worth a lot of money to us.”

# One Year Later

*with Judy Marks, CEO, Otis Worldwide*

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*Background:* About a year ago, I took over as the first female CEO for Otis Worldwide. As we speak today, one year later, Otis stock has gone up 81%!

On April 3rd of last year, Otis went public, spinning out from a larger conglomerate. As an essential business during a global pandemic, Otis was faced with a critical question “how do we protect our colleagues?” For me, muscle memory came in – go with your values and your core. This meant safety. Protect each other and that will protect the riding public.

There is no more important thing that you can do than to earn trust. Our mechanics and our skilled labor, work independently every day. We need their commitment, loyalty, and dedication to serving our customers.

For me, when asked, “what are you most proud of?” I say, we earned trust and we got through the year with 0 fatalities. Trying to keep 69,000 employees safe is not an easy target while in a dangerous work environment with high elevations.

We rallied around our mission to give people the ability to connect and thrive in a taller, faster, smarter world. We took a safe, risk-averse company and set a new culture, and pivoted to growth.

## ***My overall leadership lessons from the past year:***

- **Lead through ups and downs with empathy.** You can never overcommunicate.
- **Overuse virtual meetings.** Throughout the pandemic, I have spent 1 hour each week in a virtual meeting with a high-potential leader. I make it clear why we are meeting – because they are high potential.
- **Be the optimist.** Leaders have to look beyond the stressor and give an eye toward the future.
  - Continue to show what the future will be.
  - Know when to pivot.
  - Rally the team to celebrate what’s coming.

## Group Q&A:

**Q - Susan Huppertz:** As you took the organization from being embedded in a larger organization to a private org, how did you change the leadership tone? How did you shift the focus on growth and safety?

**A - Judy Marks:** I went outside and found other talent. A lot of our corporate functions changed. If an employee came from our previous parent company, I still had them attend the new employee orientation for Otis. They needed to know how we were going to operate, which was distinctly different from the parent company.

I brought in new operational leads. We needed to double down on field safety. In 2019, we had 8 fatalities, which was unacceptable. We needed to get to 0.

We started what we call a “stop work authority” – which means, if something is not safe, stop the job. As leadership, we needed our employees to know that their safety is most important, and we’ve got their back. No matter what, it is safety first. Always.

We had 700 stop work authorities in 2020, and **we celebrated every single one.**

**Q - Tracy Kemp:** Coming from a similar industry of buildings with hardware, industrial, etc., how did you work through the digital transition? How do you get employees to change behavior and adopt a digital platform? How did you provide a shared vision and how do you move an organization into that mindset?

**A - Judy Marks:** I believe every enterprise needs to revolutionize how they do digital. **You will only have success in a digital transformation if people understand where you are going and the roadmap.** When you move to digital, it will never be perfect. We retooled and brought in knowledge management, data, artificial intelligence. Our biggest advance was when we put technology in the hands of our field force. As a leader I know it is working because our employees have become advocates for it.

**Q - Sue Suver:** A lot of boards and CEOs are talking about how to take a position on racism, social unrest, accuracy of voting, etc. On top of everything else that is a “first” for your team, how are you thinking about this?

**A - Judy Marks:** As CEOs and senior leaders, we have become the trusted voices. I don’t believe we can stay silent. It’s a tough line to navigate. Each time I have to remember and decide – this is important to Otis and our stakeholders.

The rubric I have used to navigate this is – **Does this touch our core values? When something crosses that line, I won’t stay silent.**

**Q - Kathleen Ligocki:** When starting with Otis, you not only had a new company but a new Board of Directors. How did you go about creating relationships with a brand new board?

**A - Judy Marks:** We have a small board and we’ve actually not met “in person” yet. Several things that I have done:

- Before the formal board starts, after the Executive Chair opens the meeting, I take 20 minutes and go over four categories:
  1. Provide a progress report,
  2. What they are going to see at this meeting,
  3. Risks, as perceived by me as CEO,
  4. Other top-of-mind items (key personnel changes, etc.).
- I had 1:1’s with each board member. I asked them:
  1. How can we do better?
  2. What do you want to see out of the company?
- We do workshops. For example, last week we did a tax workshop. In June, we will do one on competitive positioning. I bring in senior leaders to lead these workshops and this allows access. The board begins to get to know our leaders, it helps to build trust, and we are establishing important relationships.



# What's in the Black Box of Board Member Search Firms?

*with Laura Mantoura, CEO  
and Board Advisory Associate,  
Russell Reynolds Associates*

## How do search companies begin the search for candidates for board seats?

First, we seek to understand the strategy of the company and the current composition of the board; to know what skills and attributes the existing board members have. Once we have done a gap analysis, we look at the types of people who might best meet the client's need, with *diversity of thought as the top priority*. Typically, we start with about 15-20 individuals who fit our needed criteria (identified in a gap analysis) and present it to the client. Then we reach out to 5-6 individuals on that list and assess the individual's capacity and *interest*, and we check for conflicts. Finally, we proceed with interviews to make a final selection.



### **How do you get on “the list?”**

*Engage Early* - Engage with search firms early in your career. Provide a reference. Be responsive to emails from search firms, even if you are not interested at that time. It is all recorded in the database, so be interactive!

*Be Known* - Think about your social media presence. How are you known more broadly so that we might find you? Are you publishing TED Talks? Are you linking to your presentations or publications? Make sure that you are harnessing opportunities to showcase your abilities.

*Network* - Show up in different types of forums so that we might find you and meet you. The more associations you are a part of, the more people you know, the better. **50% of the board of director replacements are not done by search firms.** It's important that you also use your own network for connections! Many companies do board searches on their own through referrals. It is important to have others who will advocate for you and recommend you to these opportunities.

### **If I wanted to be on a board, what would you tell me to do?**

*Kathleen Ligocki*: Do your own job really well! You are being picked by investors to represent them and their money in business decision-making. You must be someone they believe will be good at that.

*Gretchen McClain*: Boards care who is in your network, how you stay connected in your industry, in other industries, and with other forums and associations. They want to be able to pull in talent, whether it's for a consulting issue or for directors in the future. Make sure you are well connected and continue to stay well connected and involved.

### **How do you decide to join a public vs. a private board?**

*Gretchen McClain*: On public boards, average tenures can be 6+ years (commonly, more than 10 years). If you decide to go this route, be particular about where you choose as you will likely be there for a long time. For each opportunity, evaluate: How am I going to benefit and learn from this opportunity?

Private companies are more focused on 3-5 years in terms of strategy. You should evaluate for yourself if you are a long-term player, or if your strengths and goals lie in a shorter time frame. Do you have the ability to be a change agent (private company, short-term strategy) or do you have a more visionary perspective (public company, long-term strategy)?

### **What are some of the newer traits/capabilities that companies are searching for on their boards?**

*Laura Mantoura*: As companies align skills with future strategy, there is more emphasis on bringing in talent to help them think through blind spots: where is the consumer going, and where is the end-product? Companies are looking for people who are progressive in thinking and asking questions; individuals who have experience in digital transformation with a global perspective.

*Gretchen McClain*: They are looking for experience in transforming a company through technology, innovation, digital, and new channels to market. Also, transformation through M&A, and today, through human capital policy and practices that change the company.

### **If you are one of the 15 executives on “the list” presented for board selection, what are good differentiators to stand out? What would help give an edge?**

*Laura Mantoura*: First, they will check with references. This is where it's important to be known. Second, it's your own branding. Ensure you are presenting well on LinkedIn. Make sure your interest in joining a board is reflected on your LinkedIn profile. Ensure your contact information is accurate, so they are able to contact you. Be proactive and pass along your resume to search firms.

### **How do you navigate the decision of joining a board with your current employer?**

*Kathleen Ligocki*: You have an ally. Your company wants to retain you. Reach out to your CHRO and plant the seed that board work is something you are interested in. You should know what flexibility you have to join when you are ready. Go ahead and start the dialogue.

*Sue Suver*: If your CHRO or General Counsel is telling you that you can't move forward, being an outside board candidate, you need to ask why. They may be trying to protect your capacity. It may be because they want you to grow there. Together, figure out how a board factors into that.

# Signature Surge June Huddles:

## “Optimizing You” *with Surge Advisors,* *Abbe Luersman, Gretchen McClain, Kathleen Ligocki,* *Sue Suver, and Carol Seymour*

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This Huddle session created an opportunity to share the load **you** are carrying, which feels never-ending. Your loads had many similarities: business pressures, new strategies, and mental stress. What was abundantly clear is how much of an additional load you are taking on as a “bigger caretaker and more available listener” for your people. While you all believe this is important, it is in turn, taking more time from you and adding emotional stress on you.

The near-term stressor is: how do you fit some travel back in while keeping up the frequency of Zooms and touchpoints? Additionally, many of you are seeing the impacts on your people as your companies are rolling out their hybrid, back-to-office approaches. **And, because talent is scarce and difficult to find, you are walking the fine line between providing your employees emotional support and flexibility while trying to keep them excited.**

*“I think our challenge, and our companies’ challenge, is ensuring we take those learnings from Covid and not go back to the old normal.”*

A question that came up in several huddles was, **“What, exactly, is the role of the manager of the future?”**

Because work and life have become more blended, leaders are expected to be more empathetic and flexible. They are expected to have conversations with employees about their lives and their interconnectedness with their work. This is going to require different types of training and change management.

Katy Vu: I realize I get a lot of my self-worth from people around me, and it dawned on me that if my boss tells me, I’ve done a great job, then I have a great day. If he questions something, then I have a bad day. I realize, as a leader, I can have the same impact on my team. How do I make sure I am increasing their self-worth so they can go home and have a good day?

Jen Dardis: I started a “one piece of paper” concept, which is like journaling, but it captures ideas when the thought hits me, which is usually someplace I can’t journal. When something shoots into my brain, I jot it on paper so I can think about it later. I have one piece of paper for each of my direct reports with the 4-5 key things they are working on, and I capture my thoughts for them as I go through the day.

Sue Suver: One of the books I keep handy for inspiration is a book called, *Tribe of Mentors*, a compendium of Q&As from a wide variety of people, such as artists, celebrities, politicians, spiritual leaders, businesspeople, and thought leaders. Whenever I need a new perspective or lens to look through, I just open the book to any page and read it to be inspired. The one I read this morning was from Sarah Elizabeth Lewis, a professor at Harvard. The quote reminds us to stay focused:

*“The main thing is to keep the main thing the main thing.”*

Kathleen Ligocki: We can’t think about work-life balance when, sometimes, the work becomes almost 100%. Think about it as “Sway Time.” You can be 100% sometimes, but you have to make sure you sway back so you don’t get drained.

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*“Whatever you choose, whether it’s a glass of wine at the end of the day or your Peloton time, make sure it is sacrosanct time. Make sure it is at the top of your list and think of it as investing in yourself so you can do all of the other stuff.” – Kathleen Ligocki*

Heather Milligan: We did our corporate leadership training recently and we heard one of the best speakers:

Stephen Miles from Miles Group. While so many speakers are talking about the morning start time, he said there are four hours a day where you are at your cognitive best. He called these the “Golden Hours.” He said you should determine when your Golden Hours are, and you should schedule them to do the “me” work... the reflection and thinking.

Sinéad O’Connor: I found that making more time for exercise, during Covid, has helped me. The morning is my time; but rather than setting a daily goal, I found setting a weekly goal worked. It gave me flexibility to meet it over seven days and not feel bad if one day was missed.

Tina: I keep to my structure, always. I make my bed every morning and make sure everything is in place before I can start working. I recall the article you sent us, Carol, on Clay Christianson, a Mormon who refused to play basketball on Sunday for his team. He stayed true to that, and the learning was:

*Once you break your own rules, it gets easier and easier to break them again.*

All Surge members, and our Surge advisors, are working through the challenges that going back to work presents. As we take on those challenges, use the wisdom from this group. The information in this recap is helpful, but we want you to think about two things. First, pick things that will be small changes for you but that can make a big impact. Second, remember to tap into this group to support you. There are so many great leaders in this group with many different experiences and perspectives. Tap into each other and share your experiences with one another because wisdom is an experience shared.



# **SIGNATURE SURGE SUMMER SUMMIT**

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# Storytelling for Leaders

*with Kelly Decker, Expert on Communication strategies,  
and co-author of “Communicate to Influence”*

Storytelling is one of the most powerful tools that you have as a leader. We know intellectually the power of stories, but we often focus too much on the numbers. We can have the facts, the figures, and the details, but stories are what people remember.

Many of us don't think we are storytellers. Why not? What is getting in the way? You may not have confidence in it. You may think you're boring. You might think your audience wouldn't care about what you have to say. I'll be the first to tell you: they do care... if you make it audience centered.

When delivering a message, it ranges from self-centered to audience-centered on the horizontal axis. On the vertical axis, we have emotional connection, such as trust, rapport, likability, and believability – the things that draw you to a person.

We all aspire to be in the quadrant of “inspire” on the Communicator's Roadmap. We can get there by shifting our content to be very relevant to the audience and by creating an emotional connection with them to get them to shift the way that they're responding to our message.

## **To inspire people, we need to use stories.**

We are changing the audience response from, “I'll do it because I have to,” to “I'll do it because I want to. I'm all in. I'm ready to go.” That's the shift we're trying to make.

To tell a good story, we need to identify a specific memory and add details and emotions around it. Start by brainstorming all kinds of different things. Brainstorm your life events; you can go back to school days or early childhood. Think about favorite vacations, travel, hobbies, people that have been influential in your life, places that are really important to you, career stuff, first job, worst job, or big ideas that have been present in your life. What really excites you? What scares you?

It doesn't have to have a point yet; that will come. You'll see the magic of being able to link a story to something meaningful.



Next, we need to make your story feel so vivid, it feels like we were just there. I like to think about these as “brain tattoos.” Recall the sights, smells, and people. Recall what somebody said – a specific phrase that might have stood out. The concrete details are what make the story stick.

Don't ever say something like, “Well, all right, I'll tell the story, but I'll tell an abbreviated version of it, without all the details.” That's not going to do anything. We don't want to “yada, yada, yada” over anything; we want to build the mental image. The more concrete you make it, the more emotional it becomes, and the more credible it becomes, because there are additional details in it.

Once we have the concrete details, we need to connect it back and land the point. As Andrew Stanton said, "Storytelling is like joke-telling, you have to know your punchline, know the ending. Everything you're saying, from the first sentence all the way to the last, is moving toward a singular goal." We want stories to be purposeful, so we need to ensure they are audience-centered. Here are the steps to move from communicating to influencing:

**1. Listeners: Make it about them.**

Imagine who you might tell the story to. You might be preparing for an all-hands meeting or a project meeting. Who is it you are talking to? What are they like? Pick three adjectives that would best describe them. Are they eager? Are they resistant? Are they budget conscious?

**2. Point of View: Find the lead of your story.**

What's the moral of the story? What's the lesson that you're trying to teach? You want to frame the point of view to be what's changing. Can you create a single statement that takes them from where you are to where you want to go?

**3. Action Step: Make it concrete.**

You're not just telling a story to tell a story. What do you want them to do if they buy off on that point of view? What's the action required of them? You can even call it out, "What I want all of you to do is..." or "This is where we're going," or "This is how I need you to be thinking about this." If you ask them to do something specific, that's your point of accountability that you can hold them to.

**4. Benefit: Make them care.**

What benefit do they get if they take the action step? What's the *individual* benefit to them? If they are tired and worn down and exhausted, can you give them a benefit that will help them feel more energized as a result of doing this? Go back to how you described your listeners. Can you give them more confidence in what they're doing, more direction in what they're doing, more purpose in what they're doing?



Each of your stories can take on a slightly different twist depending on the way you structure them.

We talked about how town halls can be boring. Now, you all have the power to change that if you go in there with your stories to inspire people and make it exciting and engaging. Who are my listeners? How do I need them to think or act differently this quarter? What change do we need to make? What is the benefit to them?

"We had some really emotional, wonderful stories in our group, and it was amazing how we developed the story over just a few hours. You could see how those stories really started to come together, and their impact will be really awesome." - Heather

"I think we should actually practice these because, as we experienced here, the more times we tell it, the richer it gets, and the more clear and direct the point becomes." - Erin

As you tell a great story, you automatically build an emotional connection. That's how we inspire. Remember, there isn't anyone you couldn't learn to love once you've heard their stories.

# Leadership Lessons from the White House Doctor *with Dr. Connie Mariano*

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It's the journey that defines us. You are not born as a CEO or a CFO, or Chief Information or Marketing Officer, or White House doctor. You travel through this journey in life. I really believe that with every encounter you make, that person impacts you in some way. I always wonder, why am I here today? Why am I meant to meet these certain people? That's the journey that defines us.

I was born in the Philippines; both of my parents are Filipino. My dad was with the US Navy. I came to the United States when I was little; I didn't speak English. On my fifth birthday in 1960, we were celebrating at our Navy housing at Pearl Harbor. In those days, your mom made your birthday cake. You all wore the obligatory pink frilly dress; you had the loop barrettes in your hair. With all of that Filipino tradition, I was struggling to fit in as a kid in the US. It didn't help that the mantra in my family was "You're never good enough, so you have to work harder."

As I struggled with this throughout my life, I tried to be the good student, an overachiever. Finally, I understood their point: "You don't have to fit in." If you find yourself in a situation where you stand out from the crowd, flip those words around. Be outstanding, because there's something about standing out that's really cool. I became the typical overachieving Asian American kid before it was in vogue.

In 1991 when I decided to leave the Navy, I had to fill out the paperwork. As I'm reading it, it really strikes me that I'm divorcing the military. I've known the military all my life: as a Navy brat, I was born on a Navy base, and I went to military medical school.

I'm sitting in my office and my phone rings: it's the chairman of medicine, Captain John Mitas, who's my boss. He says, "Connie, I just received the message track from Washington, D.C., and I'm to nominate six candidates from the Navy to run for the position of White House doctor to represent the US Navy. I'd like to include your name in the process."

Fast forward six months later: I'm in Washington, D.C. I parade around the White House in my blue uniform. I'm with the five other guys who are being interviewed for the one position against me, and I'm eyeing the competition. One of



them was so confident he is going to get the job because he was to be the best man at the wedding of the guy we are replacing. I don't know anybody at the White House, so I must be the token female Asian quota they needed.

Heading into my interview, I take a deep breath. I also said a silent prayer because I believe in prayer. What I said was, "Dear God, if this is meant to be, show me a sign." I walk in through the doorway, and there's Dr. Lee. At that time, Bert was about 63, 64 years old, a very distinguished gentleman, business suit. As soon as I see him, I see a single tan Band-Aid right across his forehead. I looked at him and I thought, "He's human. He bleeds. Don't be afraid."

He launches into my interview. First question: Why do you want this job? I had prepared all these politically correct responses that I thought he wanted to hear, but because I didn't think I was going to get the job, and I saw a sign, I just said, "Dr. Lee, it's payback time. If I can repay my debt by serving the Commander in Chief, that's what I want to do." He says, "What can you do here?"

"I'm a Navy Commander. You see my uniform at three gold stripes: the longer I'm in the Navy, the more stripes they put on my sleeve, the more they put me behind a desk. I am not a desk doctor; I'm a trench doctor. You put me anywhere in the world outside a medical center, I know how to take care of patients."

About a second later, he stands up in the middle of my interview. He said, "I don't care who we're interviewing today or tomorrow. You've got the job. I'm going to tell Barbara Bush."

As it turns out, he didn't want to hear my canned answers. He wanted to hear my true authentic voice.

As a doctor, I'm going to share with you my prescription for life.

1. **What is your mission?** What are you meant to do in this life, as yourself, as a person? Why was I brought into this world? It may be separate from your profession. It may be something to write a book, to touch somebody's life in a certain way, to meet a specific person. Really ask yourself, "Why am I here?"
2. **Aim to stand out.** You want to stand out for yourself because people need to see that and remember you. Be remembered. Honor your authentic voice. Nobody can be you better than you. If they were going to cast you, you'd be the best person to represent yourself.
3. **Build your inner circle.** Your group here [at Surge] is amazing. You have a network of friends. You have people who lift you up, who are your biggest fans. They are friends who make you grow and achieve. You can also be real together; you can see them without makeup, or with tears. They lift you up.
4. **Take care of you.** Give yourself the love you give to everybody else: feed yourself, love yourself, nourish yourself, give yourself a break. Grow in a lot of ways, but really give yourself that break.
5. **Be humble and kind.** We live in a nasty time with the pandemic, the stress, the politics, the polarization, and everything else. Don't think about "random acts of kindness." Be deliberately kind to every single human being. I think the true measure of a human being is how you treat people when things are rough. Be grateful. Even if it's a rough day, did the worst thing that could have happened actually happen? If not, be grateful for that.

Note: Dr. Connie is not in private practice, and her book, *The White House Doctor*, is in production for a TV series.



## ABOUT DR. CONNIE MARIANO

Dr. Connie Mariano is used to breaking barriers; used to shattering the glass ceiling. She was the first Filipino American in US history to become a Navy Rear Admiral. She was the first military woman to become the White House Physician to the President. She was the first woman Director of the White House Medical Unit.

Her personal story will inspire us. Her life has been filled with many achievements: high school valedictorian, graduate with honors at the University of California at San Diego, medical degree from the Uniformed Services University School of Medicine, and a distinguished 24-year career in the U. S. Navy.

In addition to her many achievements, Dr. Mariano has a unique insight into how health strategy supports leadership capability and outcomes in some of the most stressful jobs in the world. She served nine years in the White House providing care to three sitting American presidents.

After her time in the White House, she founded the Center for Executive Medicine, a medical concierge practice which provides presidential-quality medical care to CEOs and their families. She will draw from her experience to share with us how fundamental health is to leadership.

Dr. Mariano will also share her experience in advising the Secretary of Veterans Affairs on the overhaul of the VA system. As leaders in today's environment, we must be more attuned to the health and well-being of our people and ourselves. Dr. Mariano will provide great insights into things we should think about as leaders to ensure we are supporting our teams' health as well as business outcomes.



# Moving from Change Fatigue to Change Resiliency

*with Surge Advisors, Abbe Luersman and Sue Suver*



I was talking to a CEO friend of mine recently and was asking him about what was going on in his universe. He runs a big global company. He said: "Sue, the simplest way for me to just describe it in non-technical terms; it is just flat-out crazy out there. We got balls in the air; we're trying to make sure balls don't drop. We're trying to put on our binoculars and get some long-term vision; but we're always putting them down, because we've got to figure out what's in front of our nose today."



You are the first generation of business leaders who is dealing with another level of change that has just simply not been seen or experienced before.

A big part of change is knowing your employees' "from state" in order to get them to your "to state." Understanding where they are is now even more complicated.

## **The most important thing—and many times leaders skip this— is you have to know where your people are.**

Reflect on where you think your team is right now, where your organization is, and are outcomes consistent? Are they spotty and sketchy because you've got change fatigue? Some outcomes may be visible and tangible to you, others may not. Employees have found a new version of the "water cooler." Do you know what it is, and are you dialed into it? This is a great opportunity.

There is also a part two, which is, "How do you get people back to the office?" Your employees have a newfound sense of autonomy, freedom, and a strong point of view, that they can do the work anywhere they want and anytime they want. Now you are sitting in the middle of this vice grip between this bold new workplace thought process and what your CEOs want you to do to help drive business strategy. So how are you going to engage your organization?

The thing that matters now is finding the people in the organization who have been resilient and are showing signs of resilience. The research shows that the most successful business leaders are smart, and they're capable, and they have broad points of view. But also, they're resilient; their ability to handle a lot of adversity, and bounce back, is really a differentiator.

## **Reflections on the Journey Line**

You did an exercise called a journey line: it helps you reflect on your highs and your lows. The most important thing in this dialogue around changing what you do next is knowing where you are right now. If you're fatigued and you don't have the energy for it, leading the team from here will get really hard. If you are going to meet people where they are, you need to stare at yourself in the mirror and be honest with yourself about how ready you really are.

Great leaders drive human potential. To do that, you have to create security, self-worth, and significance. No matter how VUCA it is, if you can do those things, you're going to drive greater performance.

## **The New Employee Value Proposition**

How do we make sure that we really do have a lot of happy associates? Happy associates drive happy customers and drive great business performance. What does "happy" mean?

- Being productive
- Feeling empowered
- Feeling optimistic
- Winning, as defined by their contributions and their value
- Bringing their A-game because their strengths are being leveraged and their boss knows what their strengths are
- Feeling inspired
- Getting a sense of enjoyment or satisfaction

There are three key things we are learning about the employee value proposition:



1. **People don't want to be known as a "worker."** They want you to know who they are, what they want, and what they need, so they can contribute to their fullest.
2. **Work is a subset of life, not separate from it.** The reality is life and work intermingle. How do they do the work? Where do they do the work? When are they most productive?
3. **Value comes through feelings, not just features.** Work has evolved and become more distributed and digital. When you think about what you want as a customer, understand that your employees expect the same.

Creating the right employee value proposition used to be defined around where the employees were and what they got from the organization. Now, to provide exceptional employee experience, the focus needs to be on how they feel at their organizations.

#### **How to Bring the New Employee Value Proposition to Life**

When we talk about happy employees and customers driving greater business performance, this is actually the evolved employee value proposition, where people want to feel understood. They want to feel autonomous. They want to feel valued, cared for, and feel invested in. It is truly about showing and demonstrating care.

If you want to create security, self-worth, and significance, you must demonstrate that you're willing to dare to care.

#### **Demonstrating You Care as a Leader**

We adapted this from the book, *The Five Love Languages*, to fit work environments:

- Seek to truly understand
- Use words of affirmation
- Take quality time
- Give recognition
- Demonstrate acts of service

**Seeking to truly understand** your team, you need to be connected to them. How can you get more connected? These are some basic questions to help you find out what your employees really value:

- What are their passions?
- What are their top concerns?
- What do they hope for at work and in life?
- How do they want to be cared for?

With **words of affirmation**, the goal is to build up your workforce. You are trying to create security. When there are performance concerns, people can get in a downward spiral. You can bring security by asking questions like, "You have this strength, which really adds value. How do we leverage that? How do we overcome some of these challenges?"

**Quality time** is giving someone your undivided attention. How many times are you in a meeting with your leader or colleague and they're checking their phones? Don't do that to your team. When you're there, be fully present. Take time to truly listen and to truly understand where they are.

**Recognition** can be verbal or visual; it doesn't have to be monetary. The key difference maker is that you've taken the time to think about them and act on it. How many times do you actually call somebody out within the team to say thanks for what they've done? Those little things make a big difference.

An **act of service** might be you rolling up your sleeves to help get the job done when things are tough. How do you show your team that you're there for them? How are you a strong advocate for them when things happen?

It is important to understand which are the primary and secondary languages of care that each of your team members speak. Here are three questions you can ask yourself to find out:

- How does your team member most often express care to others?
- What do they request most often?
- What do they complain the most often about? (If you can remove the barrier, that is an act of service.)

# **SIGNATURE SURGE** **SUMMER SUMMIT**

PARK CITY, UTAH • STEIN ERIKSEN LODGE  
JULY 22-25, 2021











## Digital First Leadership: Managing Your Professional Persona Online *with Richard Bliss, CEO Consultant on Digital Impact, and author of "Digital First Leadership"*

Richard Bliss set the context for why this topic is so important. A digital persona is what people see first. It is not just for your external audience. Your internal audience, your company stakeholders, are checking you out, too... your star rises when they can see all the areas you are involved and contributing. If you are leading in today's world, then you have to have a digital presence and digital knowledge.

*"The inability to master 21st-century communication tools calls into question the ability to lead a 21st-century organization."*

Social media is the first way people are going to view you: it's your first impression.

**LinkedIn** is different than any other social media platform.

As soon as you send a connection request, the chance that someone is going to look at your profile is extremely high.

Think about this: How long ago did you join LinkedIn? What was your primary reason? When was the last time you updated your profile to represent what you stand for today?

When you interact on LinkedIn (post, comment, connect with someone), people will begin to look at your profile. What we want to make sure is that the first impression you give is the impression **you intend to give**.

We are in a war for talent. In today's reality, people want to know who they are going to work for. Make sure that you are showing up in an attractive way!

### **First 3 things that are noticed on your profile:**

1. Background image – choose a background that represents you.

2. Photo – choose a photo that is close, upfront, shoulders cropped. Make sure your photo is “public.” (On your profile: click your photo, change the visibility setting to “public.”)
3. About section – Write here what identifies you as a leader. What is your “story”? What do you believe in? This section should remain similar, with few changes needed, no matter what job you are in. Find a way to focus this section around the people (remember you are writing to those who are trying to learn about you, not to recruiters/head-hunters). Whatever your expertise, you need to make it relevant to people and write about it here.

In your headline, make sure you list your company name. This is in addition to your company logo appearing next to your headline. You want to ensure people can easily find your name and your company, and keywords about you at the top.

### Hacking the Algorithm

Why are some posts massively successful? Why do some only receive a handful of likes?

When you post on LinkedIn, no matter the size of your network, the LinkedIn algorithm will first send your post to a “test group” of 10% of your connections. Here’s what happens to get your post “promoted” or “demoted” ...

### Habits causing Demotion:

1. External Link with Text = -25% to -50%
2. External Link with No Text = -50% to -80%
3. Clicking Share = up to -99%

***LinkedIn’s biggest goal for your behavior is that you participate in conversations (comments). LinkedIn values an organic networking conversation. Said differently: your best bet on engagement on LinkedIn and raising awareness does not have to be a post at all, but instead, in writing comments (text only) on others posts. These comments, however, need to have a perspective added to them.***

### Don’t Overpost

- Limit to one post a day on LinkedIn, or more than 4 hours apart
- If you post too close together, LinkedIn will demote 2nd post
- Only 1 post per person – don’t kill engagement on a post!

*Recommendation* – Posting once a week is all you need! Then, what you need to do is cultivate the conversation on that post. If someone comments on your post, be sure to comment back.

### Habits causing Promotion:

LinkedIn algorithms reward behavior. You get points for posting and points for how people respond. You also get points for responding to others. Here is the value of each response:

1. Like ... +2 pts
2. Share ... +4 pts
3. Comment ... +8 pts  
When you comment on another person’s post, the comment and the post are placed into the feed of their connection. It is an incredibly powerful means for building your brand and placing content in the feed of your network.
4. Dwell Time (“See More” button) LinkedIn awards you as well when someone reads your posts, has an interest, and hits the “see more” button to go deeper.
5. Velocity... Be ready, after you post, to engage with responses right after you post. This is the Golden Hour, or the first hour after posting! Seek 10 comments and respond immediately. Try to build conversations. When you do this, you will get 10,000+ views in 24 hours.

### The Power of Commenting

How can you participate online so that others can see the value and contribution that you are bringing?

Commenting on LinkedIn is valued differently. If you want to talk about the struggles of hiring right now, you can go find a post around that topic with your thoughts. Your network will then see you adding to the conversation. You can demonstrate your expertise without necessarily having to write all the content itself.

Going online with the power of LinkedIn means you have to be a bit more strategic. Unlike Facebook and Instagram, where a “like” has value, it isn’t the case with LinkedIn. The audience is external, not the person who wrote the post.

You can check how successful your LinkedIn approach is with a simple check on this tool. Click the link and get a read-out of your:

Social Selling Score Tool:

<https://www.linkedin.com/sales/ssi>

Take what we shared and become a Digital-First Leader!

# Signature Surge October Huddles: “S-Curves”

*with Surge Advisors,  
Abbe Luersman, Gretchen McClain,  
Kathleen Ligocki, and Carol Seymour*

**“The Great Resignation” is real, and it highlights the underpinnings of burnout and lack of understanding of how personal growth and opportunity will be fueled.** We have learned that the 2021 year for a continued pandemic has moved our daily routines into less time for checking in on our people, and less focus on sharing visions for the future. Our direct reports are not only “feeling needy”, but they are asking more questions on what benefits, perks, and compensation will look like going forward. They are investigating.”

October huddles centered on how Surgees were personally feeling at this moment, how you were continuing your own growth, and how you could motivate and retain your people.

Our group agreed that the pressure on you as leaders has intensified. Your teams want more of your time. Tracy Kemp relayed: “We are spending more time and energy trying to individualize and making sure everyone is engaged, active, and feels they can add value. There is an expectation on us now that we have to help our people figure it out.”

**Kathleen Ligocki:** We are going to have to compete in a talent marketplace. Core to our workforces will be the idea of appreciation, gratitude, and belonging.

## The Great Resignation

All of you were finding surprises from talent you thought you would keep. Of course, talented employees were being pursued from the outside and they were exploring. The jobs that were 100% virtual were very enticing for most people. Not having to relocate is a big advantage, along with the flexibility of virtual. However, some of the reasons were new, such as leaving to work for a brand they always wanted to work for or leaving the workforce entirely because they had “had enough” and retirement wasn’t so far away, or, they were making it work on one income.

Keeping top talent is proving to be more difficult. You must spend the time on retention before you lose them. It is far more

costly to hire and train new talent (if you can find them). Many of your companies were adding significant incentive structures for retention.

**Abbe Luersman:** We are allocating and nominating talents across the organization to give equity to and connect them to the strategy. It is a visible award recognized by our CEO. We put it into the RSUs, with 25% vesting after two years and 75% after four.

Some companies are throwing in an extra week of PTO (John Hancock), some were giving the day before Thanksgiving off and day before Christmas Eve. Some were providing one Friday a month for a “wellness” day to use at your discretion. Some are helping employees pay off student loans or offering big sign-on bonuses.

As Susan Huppertz pointed out, there is the feeling of “detachment” that comes along with working from home. Even “back to office” and hybrid approaches now in full swing were under-delivering cohesion and collaboration.

**“Even though I am in the office 3-4 days a week, I am only one of a handful that are, in an office of 300. It can be very boring to come in with so few people.” - Katy Vu**

Tina Tromiczak added, “Even though leaders are in 3 days a week and associates 2 days a week, there are times when I walk down the hall to go to the bathroom and the lights come on as you walk because no one has been there...it feels very strange.”

Wendy Malone suggested that people were feeling very “transactional” in virtual environments and not connected to the meaning of their business.

Camille Batiste shared that with her business situation, she could not choose an employee who lives in a remote location relative to one of their offices because when this all settles, she doesn’t want to replace that person with someone needed locally.

**Without the physical, 3-D interaction, it is often hard to go below the surface and really get to know people.**

Sandra Harris relayed an interesting story about the first live meeting with their distribution partners. Because they had been virtual for so long, people began “reading between the lines” on the intent of the meetings. Their partners were becoming suspicious of the goals and conjuring up all kinds of negative thoughts. When they finally got together, the first day showed these feelings of suspicion. But by the end of the week, they were applauding us, hugging us, and loving us. This would never happen on zoom.



Kathleen Ligocki cited from a National Geographic article: **“Our brains are hard-wired and the two most fundamental things as a species, are that first, humans are adaptable. It’s why we populated the planet. But the other is the need to be part of, or connected with, people. We are not solitary creatures. We are adaptable and capable of changing, but we need to do it with and through other people.”**

Beth Appel offered “There comes a time when it is valuable to sit in a room with people, to go through due diligence together, to visit a manufacturing location, to touch a product. If you only know people virtually, and you have never met or sat next to them, it is much easier to reduce that headcount.”

### **Define Their Currency**

All of you found it was too late to save someone once they had another offer. You ended up throwing money at a situation that was not going to be changed.

With your top talent, you need to take the time to find out what is important to them in their role now and going forward before they come to you with another job offer. As Tonya Herring pointed out, “I’m having people leave to go to their dream company at lower pay, because they can ...”

**Abbe Luersman:** “The dynamics have changed for all generations, but there is a core theme of flexibility and connectivity, yet defined differently by individual. That makes it tough because one size does not fit all. You must have enough adaptability in the framework where people can find themselves. People otherwise will read between the lines if they can’t put themselves in that context. You also must create an environment where your team feels free to say, “Hey, this isn’t working for me so how can we adapt?”

Do they need flexibility, connection, incentives? Different individuals and generations have different ideas for what they want and need.

**In a land of squishy, people want a clear and visible path on how they will move in the organization and how that fits their particular career goals. They are in a constant state of need for feedback and movement.**

As Tonya Herring commented, “It was much easier when I was younger and it seemed my generation wanted money, title, and office. The range of desires is very different, and I am dealing with four generations in my workforce.”

### **Where’s the Vision?**

Many of you were finding out from recent engagement surveys and feedback that employees were missing an understanding of the vision.

Leticia Goncalves: “No one understands we can’t predict even the next day in this VUCA environment. We are going through a significant transformation and have a strong vision, but our recent survey results suggest we are not communicating that vision strongly enough or frequently enough.” We are also constantly asking for more from our employees and failing to stop and celebrate the milestones along the way.

**Gretchen McClain:** “All too often leaders get caught up in the same stuff as our people do, which is getting the day task done. We have to decide what do we need to STOP doing because our job is about influencing our people and giving them well laid out direction for reaching the long term. We are the coaches and communicators to lift up the wings of others and inspire them even though their plate is full. The more you can do this, the more present you will be with folks when you are talking with them.”

Camille Batiste: “Even when we do share strategy and vision, it can’t be a “one and done” communication. You have to keep repeating it and in many kinds of ways.”

Susan Huppertz: “In our organization, we have defaulted to a highly transactional level even at the C-suite. We are so focused on how to get Container 64 from the China port to Long Beach that we forget to make space for the strategic discussions.”

**Kathleen Ligocki:** “Even at our Board meetings, this is a common conversation to allocate the right time between strategic and tactical because the markets are transforming so quickly. But the companies that live in reactionary and tactical will be left behind, while the strategics take advantage of the opportunity.”

**“You need to allow brain time for thinking about your strategy and vision. People are hungry for it. You will always have day-to-day emergencies, but the transactional is just not inspiring.”**

Leticia Goncalves: I have found the best way to drive change and transformation goes beyond the vision. You must establish trust with people. I found the best way to do that is to demonstrate I am invested in the individual, and align on the values of integrity, transparency, and respect.

Wendy Boyd re-shared a previous Surge meeting wisdom nugget: **“Good leaders don’t tell people what to do, they tell people what to think about. Without a strategy, they don’t know what to think about, so they are hungry for the communication and on a repeated basis”.**



# **SIGNATURE SURGE FALL SUMMIT**

Atlanta, Georgia • The Inn at Serenbe  
November 10–12, 2021





# CEO Conversation *with Surge Advisor,* *Ann Fandozzi, CEO Ritchie Brothers, Board Member Trimble*

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**Q: What interested you about becoming the CEO of a public company for the first time (after two times as the CEO for a private company)?**

**Ann:** For me, fixing a company never really matters too much. The only thing I care about is how big can this thing become? What is the vision? The problem with private equity is, when you fix the mess and you get in the trajectory of growth, you hit an inflection point, and that's when they flip it. I get really invested in these things, and in the vision, and the people, so I said, "Okay, that's it. I'm open to a public one."

What I saw about Ritchie Bros. was the industry. In used industrial equipment, \$300 billion changes hands, every year. Five to six billion sounds impressive, until you hear it is a space of 300. The other thing that I saw was, I come from cars, none of that exists in this industry. There's no VIN, there's no Kelley Blue Book. You want to know what your piece of equipment is worth? Good luck. There's no CARFAX. I love the idea that you have 300 billion to go after, and you have this potential to build out this whole ecosystem and marketplace.

**Q: Why did it take you six months to start this position?**

**Ann:** The answer is I do a lot of homework.

Let me take you through a different opportunity I didn't take. I knew the industry, and I knew they'd been struggling, so I wanted to study it. The PE firm flooded me with data: 400, 500, 600-page financials. The bad news is I'm super geeky. I like reading all of that. When we get on the first call, I'm like, "Let me tell you what I'm seeing. I'm looking at page 278, and..." It became very clear to me that, not only did they have a problem, but they had set up a weird capital structure. It was not clear to me that, even if we made this a success, that the team could make money.

I told them, "There's only one way we would take this on. We are ready. This is a team that knows the space, and they are eyes-wide-open on the problems. It's going to be really hard. We actually have to get paid upfront because I don't know how the team is going to make money." They

were like, "No, thank you." Then four weeks later, they name a CEO. The recruiter that I had been working with comes back and says, "Ann, did you make a mistake? What did this person see that you don't see?"

I told him, "I just don't feel like this person did their homework." Fast forward 16 weeks later, and they fire that CEO because it's not going well. Then they catapult in one of their internal people to be the interim CEO, and that's still the state of play.

That's not where I want to be, so I did the exact same thing here. I want to know why the company has languished for a decade. What happened? Here, I had a lot more access to data and information, because it is public, and I did my research.

**Q: What are the pros and cons of running a private company versus a public one?**

**Ann:** The thing that I wanted, which is to set the vision and be able to execute it without a high probability that it gets flipped, I'm getting that. That was my top KPI, and I have it.

In every other way, I have to be honest, I just miss the private equity. You've got really smart guys in the room, and they are in the business of making money. They look at a company, they're smart, and they crunch all their little numbers. They think, "This thing is either undervalued or has the potential," but they have no ability to do anything with that except crunch the numbers and believe. They need people like us to then come in and realize that. The quarterly meetings are amazing.

I like quarterly meetings. I told them, "You're welcome to talk numbers monthly, but quarterly, we're going to talk about how we're doing with the strategic initiatives because it takes a little bit to make progress."

They are all about how we are driving value for the business. They have a hypothesis. Just because it sounded good doesn't mean it's all going to work. What's working, what's not, what's the progress, what's the trajectory? All the meetings are like that, so it's beautiful. I'm an open book.





On the public side, I have two days of board meetings, committee meetings, and more board meetings. Over two full days, we talk about the business maybe three hours. Everything else is governance, and here's what's mind-boggling: the audit committee is like five hours. The comp committee is overwhelmed with what ISS and Glass Lewis are going to think. They worry about what's the reaction going to be on the street. I'm thinking, "They're going to react well when this thing's growing and it's going to be worth a lot more. Don't worry."

I have been here 19 months. We laid out the strategy to transform from an auctioneer to a marketplace for inside services and transaction solutions in the space. That's code for building out the Kelley Blue Book and CARFAX. The company had only done this one transaction five years before, a billion-dollar transaction. Now, since we laid out the strategy December 7th, 2020, less than a year, we bought three companies.

**Q: We're all talking about digitization, and you've taken this company through that. Talk a little bit about how you make that a success.**

**Ann:** What's that expression? Never let a crisis go to waste. Can you imagine a bigger crisis than COVID? It has allowed people's minds to open because we're all working in a different way. I wish I can take the credit and say, "Oh my God, they saw the light." No. The whole world changed. It was very easy for me to say, "Guys, this is how we are going to make it through. Here's how we're going to come out in a different way. Here's what it's going to mean. We're going to learn together."

**Q: Have you had to make significant changes on your executive team? How have you gone through that process, just coming on board?**

**Ann:** Typically, the management team that exists breaks down into a third, a third, a third, from day one. A third is thinking, “My God, where have you been all my life? I’ve always known this business had this potential. Let’s go!” A third is like, “What the hell is she talking about? I didn’t sign up to work like this. I’m out.” That usually happens very quickly – like 30-45 days. Then there’s a third that’s on the fence. They’re on the fence about me. I’m on the fence about them.

**Q: If Ann of today could give the Ann of when you joined the company advice, what would you tell yourself? What do you know now that you wish you knew then?**

**Ann:** Number one would have been to act sooner on making the necessary leadership and board changes. Number two would have been to negotiate more up front. I pride myself on being a very tough negotiator, but in this case, I want to say I “girl-ed out.”

They were worried about doing a big thing on the equity front for me initially. They basically said, “This is your first public company CEO role. Why don’t you come in, and we’ll adjust that equity later?” I didn’t realize that if ever there was a time to just kind of rip the band-aid, it was in the beginning. It seemed that even ISS and Glass Lewis kind of turned a blind eye for things that were happening at the beginning. I didn’t know any of this. I would tell myself to stick to your guns and ask for the equity piece.

**Q: When you get into the company, you know the numbers, what do you do then? How did you make it happen?**

**Ann:** I study for a long time, but that’s just on paper. The very first thing I do, which goes back to the respect for people, is I set up multi-hour sessions with the executive leadership team and the level below. And the only thing I say is, “Tell me about the business,” and I’m listening for how they think about it.

My synapses haven’t formed. I just have all this hypothesis. I stay quiet and all I’m doing is asking questions. In the ten weeks that I was here before the shutdown, I was on the road. I was in Vancouver three times, but I was everywhere. I went to our auction yards to see and understand, and to talk to customers and strategic accounts. After all that, I have a point of view.

**Q: When you do something like a digital journey you’re trying to take them on, did you need to do major training or work with HR on a major upscaling of the team? Where did you focus to make a significant improvement the fastest?**

**Ann:** Dave Ritchie started this company 60 years ago, and this is sort of magical: He was the CEO for the first 50 years, and he had double-digit growth for 50 years, 10 in the public eye. He had no technology, so it’s hard for these people that have been here to say that doesn’t work. It worked for them for decades.

One way we combat that is to run tests, such as a different go-to-market. We believe that there’s a better way to drive productivity of our sales organization, and we rolled it out in Texas. Texas is a huge market. It’s growing. If we can’t make it work in Texas, it’s not going to work. We roll it out in Q1 of this year, and it lands with a thud.

We say, “Guys, our intent was for you to make more money, not less money. Let me be clear. You are only going to keep making more money if we grow more. Our attempt was to try to do that, and we will make that happen. Don’t worry that it’s gone backwards. We will solve it, but what we need is your help. The company has been growing 1% for a decade. We can’t have that. We need to get to double-digit growth. It’s not going to happen the way we’ve always done business.

**Q: In an ideal world, how would you reshape the structure of the board to make it more effective and to be a better partner for you as a leader of the organization?**

**Ann:** I have very specific needs. I need a board that works hard. For me, that’s when people play their position. They have an expertise. As an example, we added a board member who happens to be the CFO of Grubhub. When our material weaknesses hit, he reached out to me and said, “Look, Ann, I’m brand new here, but I built our SOX program at Grubhub. Let me tell you how I did it. Let me tell you who I used. I’m just sharing because I want nothing but success. You’re welcome to call these people, or not call these people.”

The next board member that I need is one who can help with our architecture. Our architecture is in shambles. It’s a monolith. It’s not integrated. It’s not in the cloud. I have no ability to realize that vision for the marketplace until I fundamentally change the architecture. Even though we have some tech people on the board, they haven’t faced that. I need somebody on the board that’s like, “Look, I faced this. I have 17 monoliths that I rebuilt this way. This is how I did it, and this is how long it took.”

**Q: How do you manage the tension of longer-term strategy and big investments against the short-term impact to the market?**



*"I have very specific needs. I need a board that works hard. For me, that's when people play their position. They have an expertise..."*

**Ann:** What it forces you to do, when you need to make big bets, is to choose what to stop doing. People aren't working on stupid stuff, they're working on smart things. But the reality is those things, even by working on them, it's going to take our eye off the ball to get to this modern architecture. For example, we laid out this vision for this marketplace for insight services and transaction solutions; we have five pillars. Now that we need to double down, triple down, quadruple down on modern architecture, we've actually pulled back as a management team and said, "You know what? We can't afford everything." Forget "afford," talking about the dollars; I mean "afford" with mindset, with lack of focus.

It's a lot about focus and being super clear about what must stop. It's not because the other things aren't important. A perfect example: our HRIS system is the worst. The Head of People is somebody who I brought in

who I worked with before. Her organization is on its knees with this system, but she understands. If we do an HRIS system that has to plug into all of this old architecture, it's going to soak up resources that need to develop a new architecture. She's the first one that's like, "Okay, more Excel spreadsheets, and duct tape, and paper clips. We have to get through this."

Additional Comment: It comes down to, what are you not going to do? To what are you going to say, "We're stopping. We're not going to talk about it. We are stopping all efforts and activities around it."? Every organization has initiative 101, 102, 103, and 104. Usually, as it gets lower in the organization, no one ever knows it got killed. The executive team does, and maybe the next layer. But someone who's out on the plant floor, is in their marketing organization, or in the supply chain, still remembers 103. They are thinking, "It was really important. I'd better keep doing it."

# Executive Decision-Making *with Vicki Medvec,* *author of “Negotiating without Fear”, and CEO, Medvec Associates*

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The main principle we’re going to talk about today is pushing decisions down so that senior leaders can focus on the highest risk, highest impact decisions.

Senior leaders that are highly effective know where to focus. Not only do you have to know what you’re going to focus on, but you have to be incredibly disciplined about what you’re not focusing on. Every time you add a priority, you have to stop something else.

## **What are the challenges you see in decision-making in your organization?**

- Taking too much time to make decisions
- Too many voices in making the decision
- Searching for consensus
- Lack of communication and clarity about the decision (aka “churn”)
- An organizational bully who takes over the conversation
- In a matrix organization, making sure that the decisions are made by the functional experts where needed

Speed always comes up, but speed is never a problem, in and of itself. Lack of speed generally results from a desire for consensus, or decisions going up too high in the organization. We don’t want to encourage consensus. You should only use consensus as the decision rule for the decision that doesn’t matter at all. (You can have consensus on where you’re going to have the holiday party.) What we want to encourage is debate – active debate – and then a decision.

## **Who should be involved in a decision?**

What we should do is have clarity around who decides. When we don’t have that clarity, this is how it gets pushed up to the tiebreaker at the top. That leads to a lot of decisions being made at far higher levels than where they should be made. At that level, decisions are being made away from the expertise required.

When thinking about whom should make each decision, I like to use the risk continuum. It ranges from very low-

level risk to very high-level risks. On the high end, it is like “bet the company” risk. On the low end, it is picking the paint color.

Every decision falls somewhere along that risk continuum, and where it falls should drive who’s involved. At your level, you shouldn’t be making decisions below a high-level of risk. Why could that lead to crisis? The reality is, the CEO could make a mid-level risk decision, but who’s paying attention to the high-level risk that only they are positioned to focus on? You end up with gaping holes in your organization, and it is incredibly risky. You have all been asked what we should have for lunch. If you offer your opinion, what is the message you just sent? “Check with me next time.” That’s how senior-level people get involved in low-level risk decisions.

There are four big problems with escalation:

- It slows things down dramatically,
- The person making the decision doesn’t have the data,
- Leaders aren’t empowering their talent, and
- People don’t get developed.

Pushing things down creates engagement; that only happens when you let people decide, not when you ask them to recommend. Recommending takes away the joy of deciding. To develop your team, you have to help them build their decision-making muscle. If I don’t give them small stakes, mid-risk decisions to make, they’ll never be capable of making high-stakes decisions. They never build the muscle.

In the midst of a talent war, it’s not the time to elevate decisions. In a crisis, it’s typical to elevate decisions, but we want information from those closest to the data. Maybe the risk shifts because of the crisis, but we have to ensure that we’re keeping and developing our talent. We’re not going to do that if we escalate decisions.

## **How do you define the roles for who is involved in a decision?**

I like to lead with the question of risk, rather than the question of role, because it positions the right discussion





about role. The risk continuum decides the appropriate level. It also tells why the roles should not be *assigned*; they should be *emergent*. If you were to assign them, a senior level person is now saying who gets the decision, but they are removed from the information needed to know that.

The discussion is what matters. I like a very simple model called DAI. In DAI, there are three roles: the role of the decider, the role of advice-giver, and the role of that informed stakeholder. The informed stakeholders are the people that are going to do it, or the people who just need to know about it.

The “D” is responsible and accountable for three different things: they’re responsible and accountable for gathering information from the advice-givers, they’re responsible and accountable for making the decision, and they’re responsible and accountable for communicating their decision, in a direct synchronous way, to the informed stakeholders, who need to execute it.

**In a perfect company, there would be a single “D” for every decision.**

*“If you’re in the meeting, and you’re saying what I’m saying, I’m going to begin to wonder why you’re there. If that continues, I’m going to start to think one of us is redundant, but it’s probably not me.”*

I like to have direct accountability for decision-making that sits with individuals. I never believe a committee or team should hold the decision. Individuals hold decisions, and they all have first names.

This may sound easier said than done, but Amazon is a complex large business, and they use a single decision-maker model. P&G is a complex large business, and they use a single decision-maker model. What tends to make it complicated, is when we don’t specify the roles. Specifying the roles makes this much simpler than you think.

The “A” (advice-giver) is, in my opinion, the most important role in the continuum. These are the people providing unique knowledge, expertise, advice, and data. They’re accountable for providing their information. They don’t get to hold onto it, even if they aren’t asked directly.

In general, the “A’s” will always be under the “D” on the risk continuum because you want to get information from people down close to the data, close to the situation. One mistake I see a lot of companies make, is they don’t go deep enough on their “A’s.” An “A” could also be senior to the “D,” but only one or two levels. They provide their perspective, unique knowledge, or expertise only. Anything more than that, and what you’re falling into is people shopping the decision.

There are lots of “A’s” for high-risk decisions. There are no “A’s” for low-risk decisions. Low-risk decisions are just made by individuals based on what’s in their head.

The “I” (informed stakeholder) should include the people who will execute. The “D” must communicate directly to them in a synchronous way (in-person discussion or phone call; not email) or you will get churn. Churn is what happens when we don’t have good communication, AND someone doesn’t like the decision. Churn is intentional. When you have direct synchronous communication between the “D” and the executor, you eliminate the window for churn to happen and can hold them accountable.

There is no “V.” There’s no veto. If I am frequently vetoing decisions that someone else made, I am either terrible at assigning level, or I can’t get out of my own way. You will often not agree with the decision. That’s because you have different data than they have because you’re not as close to it as they are. A key part of the discipline is living with and supporting their decision. If you’re not feeling nauseous, you’re probably not really doing this very well.

#### **What should the process of making a decision look like?**

Debate, decide, align, execute: in that order. If you don’t have debate before you make the decision, you will absolutely have debate afterward.

Debate is very important. Even in this Surge group of very smart people, we see a tendency toward confirmation bias. That’s because confirmation bias is incredibly normal. In groups, we tend to push out disconfirming information. We tend to make attributions about individuals who are providing disconfirming information. We also hold confirming and disconfirming information to different standards of proof. I need to see proof – the hard facts – for the disconfirming side, whereas I am willing to take the confirming side at face value.

It is so important to hear the disconfirmation information, that there are techniques to bring that out.

- **Devil’s Advocate:** Assign someone the role of the customer or another stakeholder. For high-risk decisions, you can even use debate teams.
- **Private Collection:** Everyone puts down what is in their head onto paper, before we begin sharing our thoughts out loud. It allows us to uncover the minority opinion and unique expertise.

One of the biggest mistakes we make in meetings is, we spend a lot of time talking about what we all already know; we spend forever on the common knowledge. One of my

favorite female CEOs would say: “If you’re in the meeting, and you’re saying what I’m saying, I’m going to begin to wonder why you’re there. If that continues, I’m going to start to think one of us is redundant, but it’s probably not me.” (note: this is a good call out in the book)

We have talked a lot about deciding, but let’s talk about the timing for a decision. After we know who’s involved, we should agree on how much time we should spend on analysis to get more certainty. At the high end, I really like certainty. As I move down that continuum, I should get comfortable with less analysis. In the middle, I should be comfortable knowing half of the data and making the call. As I go down to that low-level risk end, it’s better to do no analysis. Make a decision, and if it doesn’t work out, change it.

Note that alignment is a post-decision activity. If I want to make sure I’m going to get my budget, I have a pre-alignment meeting to make sure I got people on my side. However, if I’m a leader who’s running that meeting, I want debate in the meeting. The “D” needs to hear the debate, the pros and cons, all the data, so we don’t want to have that alignment before we have that debate.

Going into the discussion, I can have one of two goals. I can have the goal of the best decision, or the goal of a particular decision. If I have the goal of the best decision process, I don’t have an agenda. I don’t care what we decide, I just want to get out information. I want to make sure we’re tapping expertise and all the data comes out. When that’s my goal, I want to use a decision-making strategy. If I have the goal of a particular decision, I want to make sure, at the end of this meeting, we are doing X. I want to go in there, and I want to use influence strategy.

How often does it happen that you don’t have a preformulated opinion on how the decision should go? If

that’s never, then are we making the best decisions? Should I have just decided instead of having the group discuss it? A lot of times, people pursue an influence strategy because the organization lacks good decision-making strategy. It’s a replacement for poor strategy in many cases.

To get to execution, you need to communicate. We talked about eliminating churn previously. Another thing to consider is, you may have a nested decision. I was the “D” and made my decision. Now the “D” is Joe, to decide how to execute. Sometimes, it is the implementation of the decision that pulls everyone back in. By clearly communicating the passing of the baton, we can avoid this.

**You get the culture you reward, not the culture you hope for or discuss.**

Remember, micromanagement is generally built at a senior level. A good indicator of it is if I ask you a question like, “What’s happening with this,” and I expect you to know. As soon as I set that expectation, I’m causing micromanagement.

Some organizations reward people for escalating things up. Other organizations reward people for pushing things down. I believe that in your performance appraisals, you should evaluate people on whether they push decisions down. If they don’t, they are not developing their talent. (note: good call out in book)

Rewards drive culture, and culture drives the decision-making process. For example, if you want an inclusive culture, think about how you are changing the way you make decisions. You can’t hear from your diverse people if you don’t fix your decision-making. If you want to tap into the diversity you are striving for, you need to use the right decision-making.

*Some organizations reward people for escalating things up. Other organizations reward people for pushing things down. I believe that in your performance appraisals, you should evaluate people on whether they push decisions down. If they don’t, they are not developing their talent.*

# Self-Leadership *with Ryan Leak, author of “Chasing Failure: How Falling Short Sets You Up for Success”*

Ryan Leak joined us for an inspirational session on Self-Leadership. As Ryan shared, he became known as the groom who pulled off the “Surprise Wedding”, where he proposed to his girlfriend and married her on the same day. He spent two years planning every intricate detail of her dream wedding. The number one question he still gets is, “What if she said no?” But it was a risk he was willing to take.

The video going viral led him to think about what others would do if they weren’t afraid of hearing “no,” or of being met with failure. Ryan realized that many people never pursue their hopes and dreams because they precalculated their own failures. They quit before they ever even try.

So, he challenged himself, and then challenged each of us to ask: ***What would I want to do if I knew I could not fail?*** For Ryan, the answer was easy—he’d be in the NBA—and since the only way to know if that dream could be a reality was to try... that is exactly what he did. In a world obsessed with chasing success, Ryan inspired us to “chase failure” and embrace the things we’ve been taught to fear. He offered us 6 questions on owning our own development, to challenge, equip, and inspire action. Because as Ryan says, “a dream without a plan is just a hope.”

***If you don’t own your development, who will?***

## 6 QUESTIONS TO OWN YOUR DEVELOPMENT BY SELF-LEADERSHIP:

### #1: Who’s my referee? (The Accountability Question)

Who have you given permission to tell you no?

Who would know if you were on autopilot?

Who would know if you hired an unqualified friend?

Our referee doesn’t need to have more experience than us. They just need to be given the authority to tell us when we’re out of bounds.

### #2: How can I get better? (The Self-Improvement Question)

Honesty often only comes by invitation-only.

The greatest temptation any team member has is to lie to their leader.

Intellectual Humility: The importance of knowing you could be wrong.

Things We Can All Improve: Listening, Meetings, Empathy.

### #3: What’s my definition of success? (The Vision Question)

If you have someone else’s definition of success, you may wake up and discover you’re living out someone else’s dream.

Success can be defined by what you want from your life. Do you want...  
*Money, Stock Prices, Admiration, Accolades, Company Growth?*

Success can be defined by who you’re becoming in your life. This could be in...  
*Relationships, Legacy, Inner Circle Respect, Personal Health, Purpose.*

***Professional success has the potential to come at the expense of personal success.***





#### #4: How do I want others to describe me? (The Endgame Question)

##### *Personal Vision Exercise:*

What's one word others would use to describe you?

What's one word you would use to describe you?

What's one word you would like others to use to describe you?

##### *Funeral Rules:*

1. Who do I want to be in the first two rows of my funeral?  
They get my best energy because they're the ones who get a mic when it's all over.

2. What do you want them to say?

***If you want to be described in a certain way, make sure that it's a true story.***

#### #5: Do I have to do it all? (The Rest Question)

Parenting, Romance, Friends, Leadership, Health—all of us are hoping to score a 10/10 in all of these categories. The reality is, that is impossible, and the outcome is guilt.

***You can drop a ball. (You already have.) Choose the ball you can afford to drop.***

#### #6: What risk do I need to take? (The Potential Question)

What if they say no?

What if they say yes?

What would you do if you knew you could not fail?

Become today who you intend to be tomorrow.

"Chasing failure took me further than chasing success ever did."

***You're the CEO of your own development.***



# **SIGNATURE SURGE FALL SUMMIT**

ATLANTA, GEORGIA • THE INN AT SERENBE  
NOVEMBER 10-12, 2021











# Let's chat about it!



**Gretchen McClain:**

Celebrating the special women in my life! Enjoy your day! While I'm not Italian, I love this tradition. March 8th is International Women's Day or, as it's more commonly called in Italy, La Festa Della Donna. Traditionally, women and girls in Italy give mimosa flowers to each other and carry them all day, honoring each woman who has come before them and fought unthinkable circumstances so that all women can have better lives. The mimosa was chosen because of its bright festive yellow color that represents joy, because it blooms in March and doesn't require much to grow into a big blooming plant, and especially because, like most women, behind its appearance of fragility hides a strong character that can thrive anywhere, even in challenging places.



**Pascale Wautelet:** Love this tradition! Thanks for sharing!!!

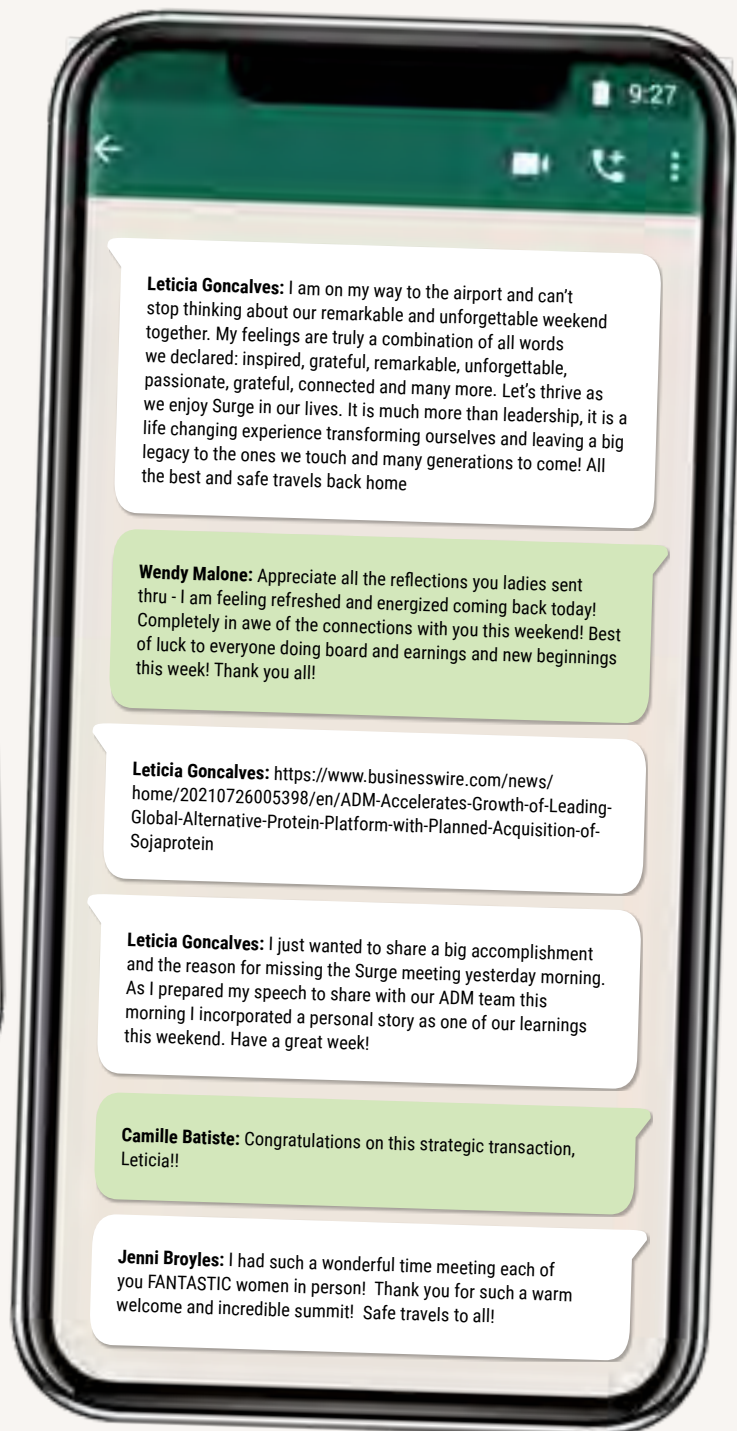
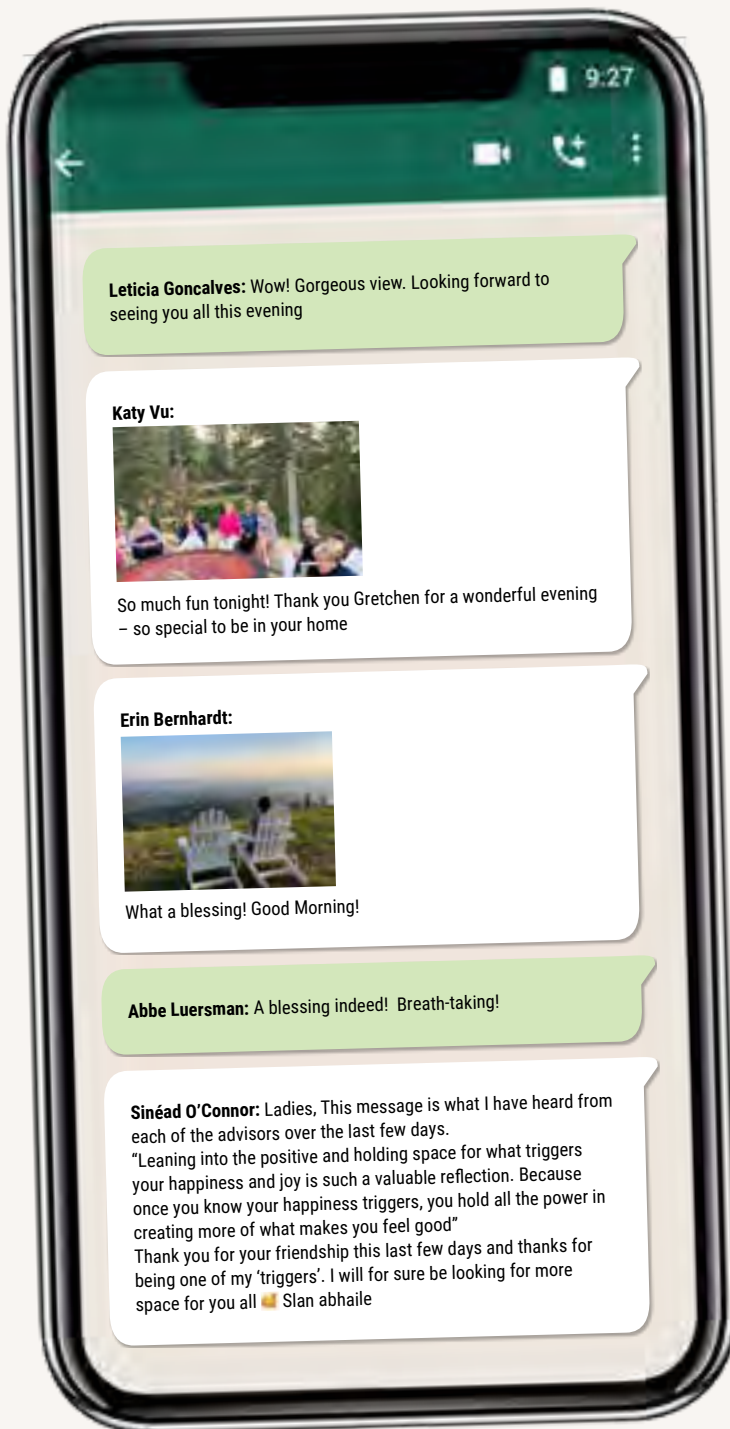
**Abbe Luersman:** We absolutely can! Let's leverage every moment to have an impact...big or small!! Happy International Women's Day to all!

**Gretchen McClain:**

Welcome everyone to Utah and Park City! Hope you love ❤️ our beautiful mountains. See you tonight!

**Beth Appel:**









# One thing I learned this year in Surge is...

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*"Surrounding myself with intelligent and beautiful women who are willing to share their wins and misses... PRICELESS!"* –**Tonya Herring**

*"The power of sharing and the importance of the network, specifically the comfort of a safe setting during the huddles to share ideas, challenges and to boost each other up."* –**Heather Milligan**

*"You have to take care of yourself in order to take care of others."* –**Camille Batiste**

*"I am at my best at work when I take time to invest in myself and my family so I can be strong for my team."* –**Wendy Malone**

*"Surrounded by such inspirational women, I must continue to follow my favorite mottos: 'always be curious' and 'never say never' as you are never done making a difference."* –**Gretchen McClain**

*"Never follow Tina Tromiczak in giving a toast (she gets the whole group laughing and crying at the same time), and just when you think you are mastering your S-curve, you can always slide back down but your Signature team is there for you...love those huddle sessions!"* –**Sandra Harris**

*"Manage the balance of equity and equality, both professionally and personally!"* –**Susan Huppertz**

*"Tips for better storytelling from Kelly Decker."* –**Tracy Kemp**

*"What Abbe said when she was talking about her decision to leave her company. She talked about how a person brought onto a team can bring out the best and worst in someone. I keep thinking about what she said and applying it in situations. It was such great insight!"* –**Tina Tromiczak**

*"We all have personal stories we can tap into to connect with people while also creating an impactful and memorable message."* –**Amie Benedict**

*"I am not alone as I face these professional challenges and navigate my career (thanks to this amazing group of Surge members and advisors)!"* –**Jenni Broyles**

*"The Sisterhood of Fabulous Women is one of life's greatest blessings. Thanks Sig Surge!!!"* –**Kathleen Ligocki**

*"Be a great steward of whatever is right in front of me! (A learning from Ryan Leak)."* –**Sue Suver**

*"No matter how busy, supporting this incredible group of women is THE MOST rewarding thing I do!"* –**Ann Fandozzi**

*"Storytelling: Tell your story, bridge & connect, land the point! When telling your story, the concrete details equal the mental pictures you describe – your audience should be able to picture/hear what you're describing."* –**Wendy Boyd**

*"The power of using stories to inspire, and that I do have stories worth sharing! Also gained confidence and perspective from my fellow Wisdom Warriors to focus on who I want to be ahead of what I want to do. Incredibly valuable and liberating!"* –**Erin Bernhardt**

*"Being part of a tribe or community that truly cares, can and does, create new opportunities and growth that are unexpected. Thank you, Surge Sisters!"* –**Abbe Luersman**

*"We have to live life intentionally and always have our end game in mind – our legacy – and focus our time and efforts to bring the biggest value and impact as human beings and leaders."* –**Leticia Goncalves**

*"It is sometimes OK to say NO!"* –**Teresa Dickerson**

*"The importance to communicate with intention and share our personal stories that shaped our thinking and way of life, to engage our audience emotionally and make them care."* –**Pascale Wautelet**

*"The busier you are and the harder it is to step away from the day-to-day 'office,' the more important it is to do so, giving yourself the headspace and perspective to prioritize and plan."* –**Sinéad O'Connor**

*"The importance of mapping out your emotional journey and understanding your Highs and Lows throughout the year."* –**Katy Vu**

*"How to negotiate without fear. I leveraged the skills learned while negotiating the compensation package with my new company."* –**Lisa Banks**

*"Growth through continuous prioritization."* –**Beth Appel**

*"Don't underestimate how a very small action from you can be huge impact for someone else."* –**Carol Seymour**

*"The only way to know if a dream could be a reality is to TRY. (Ryan Leak)."* –**Lee Ann Murray**

*"'It's payback time.' I loved meeting Dr. Connie Mariano, the White House Doctor, and hearing her story. This statement by her continuously reminds me of how fortunate I am...now 'it's payback time' ...time for paying it back and paying it forward. I LOVE Surge!!"* –**Kim Greene**



# Moments of Joy



Exciting to be together and healthy for our first family trip in 22 month, to celebrate the diversity of cultures at Expo Dubai

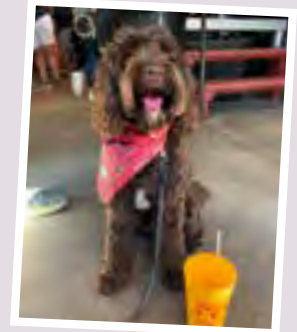
*Wendy*



Time with my nephew Cole, and his friends at an Alabama game brings me great joy!

My dog Miller brings me great joy!

*Wendy*



Working from Home "Studio" with Furry Friend to keep me energized.



*Heather*



Always a favorite - date night with my husband, A.J... anyplace, anytime!

*Erin*



Sossusvlei, Namibia... "Just hiked the sand dunes to Deadvlei, Namibia. Sitting amidst 1000 year old trees gaining perspective of the universe!"

*Kathleen*



Best feeling in the world, being with family and Clemson winning... Orange Bowl 2016... first significant win toward the National Championship.

*Sandra*

My picture is with my two lovely nieces, Nora and Dottie enjoying time at the beach this summer.

*Wendy*





Complete joy for me is being with my favorite people (my family) doing our favorite thing (traveling)!

*Jenni*



Girl Power! An epic mountain bike ride with my daughter (second from left), me (third from left) and friends.

*Sam*



I am always about family first!

*Gracie*



A simple snapshot of my best friend, life partner - a true love that inspires & supports me in being my best, unapologetic self-every day!

*Jonay*



My new kitchen that was 6 months in the making is bringing me much joy! I look forward to all the memories yet to come with family and friends as we gather around enjoying delicious food, libations and great conversation.

*Onnie*



A picture of me with my family in July at Glacier National Park, Montana. Montana is my home state and one of my favorite places in the world. This photo brings me joy because I am with the ones I love and together seeing the beauty of Montana. Husband, Christian, and three daughters left to right Claire, Erin and Sydney.

*Tracy*



Making the best out of a Christmas away from Extended Family.

*Leresa*



# Moments of Joy

The ocean breeze at Castle Hill on a Sunday afternoon sometime in September.

*LeeAnn*



Joy is spending time with my three grandchildren, Avery, Bowen and Blake.

*Coral*



My daughter, Raynah and our puppy, Oreo.

*Ran*



It's never too early to mentor a talented young and interested woman. (Myself and my grandniece).

*Dutch*

My family in Hawaii. This was our first vacation since Covid.

*Lisa*



I visited Hawaii for the first time this year, a real bucket list item. This was taken on top of the volcano crater in Maui.

*Katy*







Tom is the love of my life.  
My rock. My everything!

*Anna*



Every moment matters, especially when you spend it with those that elevate you to new levels. Be sure to leverage and cherish those moments!

*Abbe*



Enjoying time with Peyton and Madeline.

*Beth*



Hiking in Italy with my best friend/husband, Soren.

*Susan*



My happy place is anywhere on earth with my family!

*Kimi*



Myself & husband Chris at the top of Carrauntoohil Mountain, highest mountain in Ireland. Happy day for me, I like to push myself and also love a good view. 'Work hard play hard'.

*Sinead*



Giving Thanks" with friends and family.

*Camille*

# What's on your mind?

**Jenni Broyles:** When will the supply chain go back to normal?

**Tonya Herring:** How do we leverage scale and size? How much centralization will need to happen and how will it affect my small, young team?

**Camille Batiste:** How to find balance in life? How do we make the pivot from only focusing on a successful career to focusing on having a successful life? What do I want next year to look like? What am I going to do to make that happen?

**Sue Suver:** When will there be relief from covid and what is the impact on working moms and what are they going to be able to do for their families? Will we see the model go back or what can women do to reinvent the wheel to stay career-driven and move up the ladder?

**Wendy Malone:**  
How can I get my team more energized and bring them together?

**Gretchen McClain:**

What will my life look like in one year?

**Teresa Dickerson:** I tend to over volunteer, and be involved in everything.

Can you over-network? Can you get to a point where networking is too much? How do I draw the line in over-networking and over-volunteering?

**Erin Bernhardt:** How much of the consumer online buying process is going to switch and to what extent will we be influencing that? How do I keep some of the positive things that have shifted? Where is the balance and how do you not lose the positives of yourself while things are speeding up around me?

**Sinead O'Connor:**

How will retention issues balance and shift overtime to fix the labor shortages and supply shortages?

**Tracy Kemp:** How do you have the balance with doing more and fast in the software area but also, having to pull back on mechanical because we are missing supply. How long and what's the right balance?

**Susan Huppertz:** How do we balance the tactical and the strategy of high priority and crisis situations? How do we create that look forward mindset of dealing with a situation?

**Tina Tromiczak:**

When are we going to be able to travel the world again?





A Toast From

## Surge Advisor, Kim Greene

"I have to admit that I was quite taken aback by the statistic that Carol shared with us that gender parity is going backwards. I'm reminded of Ronnie Hagan, who has been part of Signature and on the Southern Company board. She's the reason I was introduced to Carol and that Signature came to Southern Company.

Ronnie has had a successful career as a CEO, she's on several boards, she's amazing. She gave me a piece of advice that I think about all the time. That was, as she looks back over her career, she has a lot of pride, but there is one regret: she thought the number of women leaders would increase, and as she looks back, the numbers have not really moved. Her guidance to me was not waiting until you're retired to do something.

We have the opportunity today to make a difference, and we should. We have an obligation to others like those who have helped us. I will say this (I don't know who this is attributed to), but: "If not us, then who; and if not now, then when?"

Kim Greene



A Toast From

## Surge Member, Leticia Goncalves

"I know I've been here since the beginning, and I cannot leave this group.

It's almost like my legacy. I feel, every time I meet you guys, I go back and I feel energized. I feel I do have a support system. I can be my very authentic self. Camille knows. She has been a great partner for me. We all live in our companies, and especially in the corporate world, there are a lot of politics. There are a lot of times we cannot be our authentic self. We need this environment where we can just be us.

We can have an honest and transparent conversation without having people judging us, backstabbing us, or trying to create a different story around the situation. It just allows us to be ourselves and get the best out of each of us. I feel the uniqueness that each of us brings to this group and where we learn from each other. The support system we create, I could not find elsewhere.

I want to see the legacy that we can create together year after year. I'm looking forward to seeing how we're going to build even more momentum in this experience.

This group can do that in a safe environment, in a trusting environment. And we can learn from each other. We can support each other in a way that it goes deeper than just superficial relationships. Here we go deeper into what the heart and mind, together, can mean to unlock the best out of people.

Let's celebrate Surge!"

Leticia Goncalves





*We found our people!*

*Signature*  
LEADERS