

The CEO Forum

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THE LEADERSHIP ISSUE

TOP CEOS TRANSFORMING LEADERSHIP



WOMEN LEADERSHIP

Kathy Warden

Chair, CEO & President
NORTHROP GRUMMAN



MEDIA

Alan Murray

CEO
FORTUNE MEDIA



ONE AMERICA—INNOVATION

Byron Allen

Founder, Chairman & CEO
ALLEN MEDIA GROUP
(THE WEATHER CHANNEL)



SUPPLY CHAIN

Kate Gutmann

President International,
Healthcare, Supply Chain
UPS



DEI

Arvind Krishna

Chairman & CEO
IBM



CORPORATE GIFTS & RECOGNITION

Todd Simon

Chairman & CEO
OMAHA STEAKS



LEADING WITH HUMANITY

Aditi Javeri Gokhale

President of Retail Investments
NORTHWESTERN MUTUAL



FIGHTING HUMAN TRAFFICKING

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Ronald G. Weiner

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It's appropriate that I am writing this on Martin Luther King Jr.'s birthday as to me he is arguably the most important American leader of the 20th century. And I believe him to be the one visionary who, even five decades posthumously, had the message spot on for 2023. Also, King had a special ability as the ultimate connector with character. CEOs need to become connectors; and I believe Martin Luther King is the gold standard.



At its core, King's message was about action, which starts with open-minded listening. King taught us the single most important first step is having an open mind and not being trapped by our past beliefs. True listening—empathetic listening especially when you don't agree—is a core principle King laid to find common ground and moving forward together.

In 2023, a new leadership model is emerging: a model built on collaboration, action and purpose. This publication you hold in your hands features 10 leaders who have all met the criteria of being a Transformative CEO—each with a different category and each with a different message. And ideally each inspires you to collaborate and create value as a leader of the future.

This magazine is read by over 100,000 CEOs—including the top 10,000 in America. My hope is that you, as a CEO, help create your own leadership model—build on having an open mind, listening empathetically and being a connector. That is how we all create a collaborative world and elevate business, the economy, and society.

A stylized, handwritten signature in blue ink, likely belonging to Robert Reiss, the author of the letter.

The CEO Forum

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THE CEO FORUM GROUP TEAM HIGHLIGHT



Meet John Iannuzzi.

CHIEF RADIO ENGINEER

With over 25 years of experience in the radio broadcast industry including as Operations Manager of the Lifestyle and Business Talk Radio Networks and with Westwood One in their Technical Operations Center. John is a key member of The CEO Forum Group who oversees the editing, production, and distribution of all interviews and podcasts. John also maintains the CEO Forum Group's relationship with our syndication partners and our growing list of radio station affiliates.

John enjoys traveling and spending time with his wife, Sonni-Ann, daughter Lemon Rose, and their pets. He's currently training to become a recreational pilot and learn jazz trumpet. He's pictured above with The CEO Forum Group's Founder, CEO and Publisher, Robert Reiss. The two have been working together for over 15 years.



A pulse on the workplace

An interview with Dr. Sanjay Rishi—
CEO, Work Dynamics Americas, JLL



Robert Reiss: Give a snapshot of what workplace means today.

Dr. Sanjay Rishi: In the shadows of the pandemic there has been a seismic shift in how workplaces are perceived. This comes down to the heart of how talent has become so much more portable. The sense of belonging, this idea of brand affinity—and of culture—these are all compelling conversations. And workplaces play a fundamental and pivotal role for organizations to attract and retain people, and then drive innovation and culture and creativity within the organization. The concept of culture is actually very fleeting. You see it, and it's there. But it can be quickly lost in organizations. The call for CEOs is to preserve the culture but, just as much, shape and evolve the culture of their organization to take advantage of these shifts.

How is the workplace evolving?

Workplaces are evolving to become human-centric and more focused on employees' needs. The

workplace of the future is responsible, personalized, and experiential. For a future that is responsible, people want a purposeful workplace, some place they can relate their own values to organizational values. One of the things I see is a clear shift in the balance of power from organizations to individuals. The voice of individuals today is much louder.

The second is all about personalizing the new that is hybrid and flexible workplaces. Workplaces are no longer bounded by the four walls of what used to be an office. It all comes down to one concept: work is not where you go but what you do. You get work done, whether it's in a cafeteria, a lounge, at an airport, at home, or at the office. Physical boundaries have dissolved. So again, creating this space that is personalized, both for individuals and work groups, is essential. And all of this requires very deliberate strategy, structures and investments.

Third is experiential. If you think about our life in the workplace, compare it to our lives at home, and when we are on vacation or travel, it is so much more enabled with smartphones and technologies than it is in the workplace. Building a workplace that embraces technology and creates peak experiences informed by insights gathered from data is paramount.

When you speak with CEOs, what are they telling you about workplace?

CEOs are starting to think about creating purposeful workplaces. How do you bring people back to work? It's not a question of whether anymore. It is about how do you bring them back? How do you create a workplace and invest capital into a workplace that communicates to people coming back that it is about health and wellness, mental wellness, physical wellness, clean air, clean water, etc. All of this is extremely important for people to come back.

The idea of the old watercooler conversation and feeding off of each other is instrumental. You can't have people come back only to come back and sit in



In The Workplace You Need Now: Shaping Spaces for the Future of Work, work environment executives and experts Dr. Sanjay Rishi, Benjamin Breslau and Peter Miscovich deliver a practical framework for how to plan, invest in and create effective digital/physical hybrid workplaces that are beginning to define the world of work.

their offices or in their cubes to be on Zoom calls. If that's the case, they're not going to show up. It's about structuring work groups, so people want to come back. This requires real strategies and real thought behind it.

Is there any one action a CEO can take to build a better workplace?

Absolutely. Empathetic listening. It has never been more important. And it plays into the humanization of the workplace way more than it did before. Listening with empathy helps CEOs with three of their most important functions: to imagine, to invigorate, and to influence.

What do you personally think we should focus on in workplaces?

I'd say sustainability. 40% of greenhouse gas emissions come from built environments. So if you think about it, our opportunity to make a positive difference working with our clients and organizations across the globe is tremendous. We at JLL feel a real sense of responsibility.

I'll give you a couple of statistics that makes it very real. We work with major investors, who invest in the domain of real estate across all types of assets, offices, and warehouses and manufacturing. 80% of those

investors are telling us that in their due diligence they are very deliberately asking questions around sustainability. 73% of those investors are telling us that occupancy in green buildings is so much better than those that are not, and that valuations of those buildings are higher than buildings that are not sustainable and not green. And technology is core to sustainability. We are investing in building these capabilities around smart buildings, around sensors around predictive maintenance, around clean air, and clean water and recycling, all of which are spaces that we touch, we influence and we affect.

Finally, what is it JLL is most trying to accomplish?

We put a lot of thought and energy into our purpose statement with deliberate intent to guide our people and support our clients in their pursuit of success. It calls for us to shape the future of real estate for a better world. I say that because these terms, like "a better world," are now manifesting itself into our culture. A better world can be about diversity, about equity, about inclusion, it can be about sustainability, it can be about resilience, and it can be about talent. The focus around responsible workplaces, health, wellness and have never been more pronounced.



Sanjay Rishi leads the Americas team dedicated to helping clients create, shape and manage the future of work by enhancing the performance of their workplaces, real estate portfolios and people. For 25 years, Sanjay has helped large, global businesses leverage technology to uncover better, smarter and more innovative ways of working. He has deep expertise in complex businesses, transformational change and the development of disruptive technologies. His Work Dynamics team across the Americas leverages data to build, manage and improve spaces that can transform how people work every day. Sanjay is also a member of JLL's Americas Executive Committee, which sets the direction and strategy for JLL in the region.



Generating leadership through diversity

Chair, Chief Executive Officer, and President of Northrop Grumman Kathy Warden explains how diversifying leadership empowers both the workforce and the company as a whole.

Chair, CEO & President, Northrop Grumman



The CEO Forum Group has selected Kathy Warden, Chair, CEO & President of Northrop

Grumman for the Transformative CEO Award in Leadership in the category of Women Leadership. This is bestowed for her unwavering commitment to advance women in STEM.

Interviewed September 1, 2022

Robert Reiss: Talk about your success in achieving gender equity and DEI.

Kathy Warden: Well, we take DEI very seriously. For over a decade, we at Northrop Grumman have had purposeful plans in place in order to increase representation within our workforce. We've set specific goals and held our leaders accountable for achieving those goals. But, we haven't stopped there.

We have also worked to provide the resources our teams need to reach deep into the education system and attract more talent to science, technology, engineering, and math.

Our country has a true supply and demand imbalance in technology fields of both women and persons of color who are pursuing these great jobs. We want them to see that there are role models in our company who have been successful and have reached not only their career goals, but also their life goals through pursuing opportunities in STEM. That has really helped us to not only increase our company's representation, but broader representation in the STEM field.

How do we get more women in executive leadership positions?

I'm encouraged to see women taking more senior leadership roles, not just running companies, but having significant impact in senior technical roles, senior government roles, and leading universities. All of these roles help to show that women can lead in many different ways and contribute in many different ways. Also, that career goals for young women can be unlimited. And as we do that, I believe we'll see the metrics associated with women in senior leader roles continue to improve. We've certainly seen that with women on boards. And I think that is an important start for corporations to show gender diversity in the boardroom, as well as the executive management team. We focused on that at Northrop Grumman. I am proud of what we've achieved, but we still have more room for improvement and we're working toward that every day.

About 25% of your 90,000 total employees overall are women. But, women comprise 32% of your vice presidents, and 40% of your executive team. How have you found success in building diverse leadership?

We have focused on people in our company seeing a career path to the top no matter their gender or their race. And in order to do that we have looked at diverse slates of talent, diverse interview panels, and we have mandatory diversity, equity, and inclusion training around unconscious bias.

These are all tools but it really does come down to the culture of the company and a sense of belonging and inclusion that we create together for all people. Once you remove those barriers, whether they be real or psychological, it helps people to see that there is a path inside of our company to senior roles either on the management track or the technical track and that we value each.

What's your thinking on culture and mission?

I've mentioned how important culture is and having people in our organization really connect to the



“I’m encouraged to see women taking more senior leadership roles, not just running companies, but having significant impact in senior technical roles, senior government roles, and leading universities.”

mission, and the purpose of the company is so important to building that culture. What we do as a company is support global security. We see that people are attracted to work in our company and stay in our company because they feel like their work has meaning.

We also incorporate this into our values. Not only do we have values that create a framework for how we operate, like always doing the right thing and working toward shared success with all of our partners, we have values like “We Pioneer,” which inspires our team to know that the work they’re doing makes a difference, and to be open to new innovative and entrepreneurial ideas. This not only inspires them to bring their best, but it also reminds us how important diverse perspectives and experiences and life lessons are to innovation and to the core purpose of our work.

Talk about your vision around supplier diversity.

One of our core values is committing to shared success. And that means all of our suppliers and partners. We have set goals to increase the diversity of our supply base, because that diversity brings value to our customers and our organization. Those goals have allowed us to achieve some of the results that you’ve spoken about. But we also focus on investment that helps those businesses thrive and find other sources of revenue opportunity.

For instance, we work with over 3,000 women owned businesses, and we have mentor protege programs that help them to develop plans for expanding their business. Of course, we want that to happen with Northrop Grumman. But, we also want to help them expand well beyond our company and get access to other business opportunities as well.

What are some of the biggest challenges you see in DEI at Northrop Grumman?

Our company is, at its core, a technology company.

Chair, CEO & President, Northrop Grumman Corporation

I see our biggest challenge is that we need to attract more women into science, technology, engineering and math. We need to create pathways for people who don't necessarily see themselves pursuing a STEM career to come into the field later in life.

We're working to do that and open doors that previously had been limited because of people's lack of STEM education. I do believe that reaching young girls is a key part of opening their ideation around what a career in STEM can look like, and realizing not only how fun it can be, but also showing them a sense of belonging in these communities and a real purpose in their work.

"We have focused on people in our company seeing a career path to the top no matter their gender or their race."

How do you see the future of diversity?

Sustaining diversity, equity, and inclusion is about creating a sense of belonging for everyone in our organization. We have continued to focus on diversity representation, what inclusivity looks like in our company, and reaching equity. But, we are also now extending that to creating a culture of belonging, where people are not just able to thrive at work, but to thrive in life.

We're focused on what they need from their employer and what they can give to others in the work community. Revisiting this value proposition at Northrop Grumman has really helped us to stay in tune with what our employees are telling us is important to them, in order to be able to bring their whole self to work and feel the connection to our work and our company. I think this is the next evolution in our DEI journey.



Kathy Warden is chair, chief executive officer and president of Northrop Grumman Corporation. She was elected chair of the Northrop Grumman Board of Directors in 2019, and she also served as president and chief operating officer, as well as corporate vice president and president of Northrop Grumman's Mission Systems and Information Systems sectors. Warden also held leadership roles at General Dynamics and the Veridian Corporation, she was a principal in a venture internet firm, and she spent nearly a decade with the General Electric Company working in commercial industries.

Warden earned a bachelor's degree from James Madison University and a master's degree in business administration from George Washington University. She currently serves on the Board of Directors of Merck & Co., Inc. and Catalyst, and as the vice chair of the Greater Washington Partnership. She is also a member of the Business Roundtable, and the 2022 recipient of the Deming Cup for Operational Excellence.





Be a force of
trusted leadership.

By: Kip Morse | CEO, International Association of Better Business Bureaus, Inc.

There has never been a more crucial time to focus on building and maintaining high levels of trust within your organization. Research by Better Business Bureau® and others have linked a company's trustworthiness to success in the marketplace.

Measuring high in trust leads a business to break away from its competitors, using stronger performance and productivity, increased creativity, collaboration, and innovation within their teams, and in attracting and retaining loyal employees. Trusted businesses are consistently recognized as extraordinary—as great places to work, and as a positive force in their community.

Achieving organizational trust is not accidental, but rather the desired outcome of leaders that uplift and elevate the personal character ethics of the organization's leadership.

As CEO of the International Association of Better Business Bureaus, I have the privilege of seeing the broad impact that high character leaders make in their business. I pore over our research to focus on developing the programs, products, and services guiding leaders to take trust to the highest levels. And in my personal life, I seek to mentor those around me—both inside my organization and in the community—to reach their top.

I know that the climb to a higher purpose is not always easy. We all face moments that test our character. In my experience, leadership is learned and shows up in others as courage, conviction and conscience. Trust is about personal growth.

To start the process, you can ask yourself five questions honestly, privately, and critically about your leadership. The answers may calibrate your spirit to a personal True North and could be the starting point for growth and transformation in your business.

- Are you seeking wisdom in your leadership growth? What steps are you taking to grow in your

leadership?

- Do you respect what others inside and outside your organization have to say about your personal leadership of the organization? What have you heard and how did it inform your leadership?
- Are you leading as a servant leader to set an example for others to follow?
- Tactically, how could trust serve as a guiding principle in your leadership? What's one thing you could do to elevate trust in your day-to-day activities of running your business?
- Who holds you accountable? What have they taught you and how did their support transform your leadership?



With 32 years of BBB experience and 22 years as president and CEO of the BBB in Columbus, Ohio, Kip Morse was tapped to lead IABBB in early 2021.

Kip is known for his commitment to integrity, having launched programs such as the BBB Torch Awards for Ethics, the BBB Spark Awards, Center for Character Ethics, the BBB TrustScore, and other programs that focus on the role of honor and truthfulness in personal behavior and in business performance.





Alan Murray explores the Bronx with buildOn Student Michael Taveras on their way to serve the community. Photo by Srijan Tamrakar.

Searching for the soul of business to make it more human

Fortune Media CEO Alan Murray discusses the company's history, his role as CEO, and his observations and analysis of the social progression of capitalism. He dives into the future of corporations and how their role needs to continue to evolve to elevate business and society.

Interviewed: September 29, 2022

Robert Reiss: Welcome, Alan Murray. How are you, Alan?

Alan Murray: Robert, thank you so much for having me on your show, I really appreciate it.

Always good to see you. Let's take it back to September 1, 1929—one month before the stock market crash. What was the original concept of Fortune?

Well, first of all, I want to be very clear, Robert. I was not there in September of 1929, but here's my understanding of what happened at that time. Henry Luce had created Time Magazine six or seven years earlier, and it was the height of the boom.

He thought there was an opportunity to do a big, beautiful magazine on business. He took a mock version of it to his board that September and said, 'What do you think?' and they approved it. The magazine didn't actually hit the streets until February of 1930. So, Fortune was conceived in the Roaring '20s but born into the Depression. I think that's kind of shaped its culture and its feel ever since.

You know, there was a famous editor and a famous photographer for Fortune, who wrote probably the most compelling chronicle of the pain of the Great Depression: *Let us Now Praise Famous Men*. James Agee was the editor. Fortune, from a very early day, had a social conscience, and I think that's continued to this day.

And what about starting your own career in journalism at just nine years old?

Well, no one can make an intelligent choice about their life and their career at the age of nine. But I did for some reason, and I was interested in journalism. I started walking up and down the street asking people about their lost pets, or visiting grandparents, or



The CEO Forum Group has selected Alan Murray, CEO, Fortune Media for the Transformative CEO

Award in Leadership in the category of Media. This is bestowed for his exceptional leadership in redefining and communicating the concept of capitalism.

who won the swim meet. I would hate to age myself here, Robert, but this is before the days of Kinkos or Xerox machines so what I had to do was write it all out longhand.

My mother, bless her soul, would type it using a special kind of carbon paper. And then I'd put that carbon paper on a jelly sheet copying machine, and I could run off 30 copies maximum, and then the ink ran out. I didn't want to make my mother type it all over again, so I would do 30 copies, and I sold them for a nickel a piece. That was how I got my start in journalism and, after that, I edited the high school and college newspapers. I tried once or twice to take a different course, but it was somehow built into my gut. I stayed with it.

You've been CEO for almost a decade. What does Fortune mean to you?

Until seven or eight years ago, it was pretty much strictly a print magazine. What I realized when I came on before I became CEO, my job was to figure out how to retool this magazine for a new century. Print magazines weren't going to be the way to make a living. We've spent a lot of time on that over the last few years, building up our executive conference business, and building up new businesses. We have a training platform called Fortune Connect, and we're about to launch a commerce platform called Fortune Recommends. I see my job here as CEO as "how do I

“Fortune was conceived in the Roaring ‘20s but born into the Depression. I think that’s kind of shaped its culture and its feel ever since.”

create enough extensions of this great brand to make sure that it sticks around for another 100 years?”

Let’s break down the fundamentals of what makes Fortune successful.

Fortune has differentiated itself by devoting more of its time, energy, and skills to the benchmarking business. The Fortune 500 is probably our most well-known brand, but we also have The Most Powerful Women’s list, The Most Admired Companies, Great Places to Work, Change the World list, etc....So, we really believe in the power of benchmarking, in addition to the power of our journalism. We’re willing to celebrate when business does good things, as well as write scathing articles when business does bad things. We believe our purpose is to help make business better in every sense of the word. In the last five or six years, we’ve doubled down on that.

I mentioned The Change the World list, which is a list that’s coming out in a few days. In fact, it’s a list that celebrates companies that are making measurable progress and addressing social problems as part of their core business strategy and profit-making strategy. We have a community called The CEO Initiative that’s about 200 CEOs that meet regularly to share ideas on how they can maximize their social impact. At the same time, they’re maximizing their profits. It’s become a core part of our purpose and our identity, and I think distinguishes us from other business media.

A decade ago, you and I had breakfast and were talking about the need for more women CEOs. Back then we had more CEOs with the first name John than we did women CEOs. I remember telling you my goal of us needing to advance to over 50 Fortune 500 women, and we’re going to

get there soon. Still, that’s only 10%. What is your take on the importance of bringing more women into leading organizations, and what are the next steps?

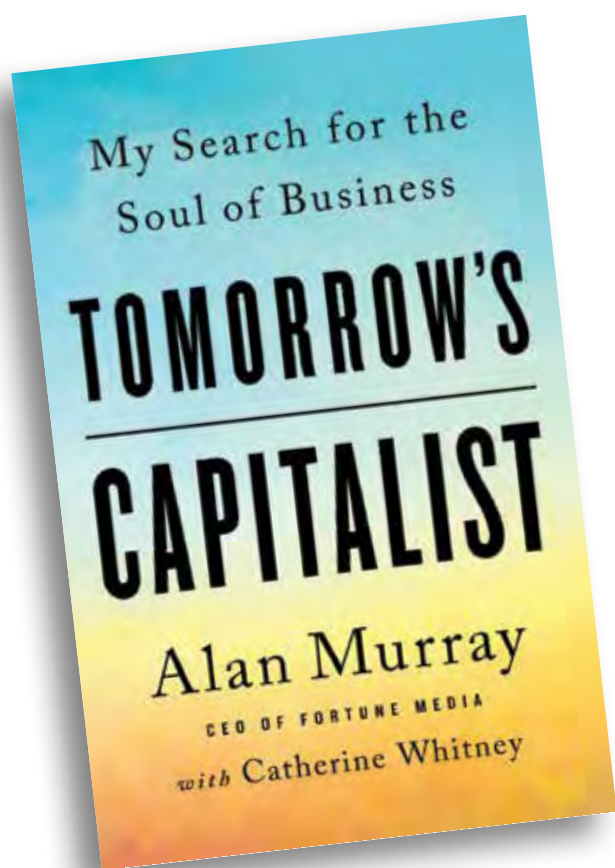
It’s incredibly important, and I don’t think we should have 50 Fortune 500 women CEOs, I think it should be 250! As you know, women make up half the talent pool, and there’s certainly no dearth of talent. My executive team is half women now, and I’m proud of that. Fortune played an important role in this long before I got here. A woman by the name of Pattie Sellers created the Most Powerful Women’s list 25 years ago. At the time, I think there were only two CEOs who were women in the Fortune 500. Much has changed since then.

“Fortune has differentiated itself by devoting more of its time, energy, and skills to the benchmarking business.”

At one of our events in 2019, before the pandemic, Julie Sweet, who had just become CEO of Accenture, stood up at The Most Powerful Women’s breakfast and said, “I don’t think I would have my job if it weren’t for The Most Powerful Women’s community.”

I feel like Fortune has played an important role in this. We not only list the women every year, but we convene them at the Most Powerful Women’s Summit. It is an amazing event, and women like Julie feel so loyal to it. It has a history of promoting women for the last 25 years.

Progress has been made, but not enough, and we're continuing to push for that at Fortune. It's complicated, by the way. You know, there's the whole question of women as caregivers, and the intensity they feel about that. There are cultural issues in the workplace that cause many women to decide early on, "I'm not sure I want to be CEO." You have to explore this and ask, "Well, why do they feel that way? What is it about the workplace that makes more women say that than men?" It's not a simple issue, but it's one we have to crack.



Let's talk capitalism. CEOs are becoming acutely aware of the changing game of business. You talk about it in your new book: *Tomorrow's Capitalist*, which I absolutely loved because everything is right there in just one book. It outlines the full

continuum of the sea change of capitalism. Let's start with December 2016.

2016 was kind of an interesting moment in the history of business and society. You had the Brexit vote in the U.K., and a lot of business leaders were saying, "Whoa, no one listened to us. I mean, we said this was a bad idea." And the public voted to do it anyway. Then in the U.S., you had this election where Donald Trump on the Republican side was running against globalization, running against free trade, and running against the things that had made many of these business giants successful. On the other side, you had Bernie Sanders, a self-declared socialist, almost winning the Democratic nomination.

I think, in 2016, a lot of business leaders were saying we've got to do a better job convincing the world that we are good for society. Look, you and I believe in business. We believe in capitalism. The phenomenal decline in poverty around the world over the last 30 years is a result of more countries embracing capitalism. But I think a lot of business leaders are saying, "Wait a minute. Are there questions out there, particularly amongst the younger generation, about whether this system makes sense?" So, there was a real focus on how can we do a better job demonstrating our contributions to society.

To me, the most fascinating story was when you helped organize a meeting between 100 CEOs and the Pope at the Vatican.

We found out through a contact here in New York—Monsignor Franco, who was at the UN on behalf of the Vatican—about this opportunity to meet with Pope Francis, who, by the way, had not been particularly business-friendly.

He came from Latin America and had seen many of the dark sides of capitalism. But he had an interest in engaging in dialogue with business leaders, and we said we can make that happen. After a lot of

negotiation—because working with the Vatican is not a simple matter—we took 100 CEOs of large companies to Rome to meet with the Pope.

We spent a day in working groups talking about how the private sector can help address climate, workforce development, water shortages, and many of these big social problems. There were some great ideas that came out of that, some of which became more than ideas. We had them all translated into Italian, sent them to the Pope overnight, and then on Saturday, we went to the Vatican. We also got to spend a couple of hours in the Sistine Chapel prior to the meeting, which was an amazing experience.

Then, 100 CEOs met with Pope Francis and presented the results of their work. He was impressed with what he saw and realized that these people had an enormous influence on the state of the world. Pope Francis spent a couple of hours meeting each CEO individually, and it was an amazing event. Out of that, the CEOs who participated, almost without exception, told us that this is an important conversation, and we should keep it going. Out of that, we created The CEO Initiative.

“I always thought my role in life was more to explain the world than to change the world. But over the course of the last decade, I was hearing a very different tone in the voices of the CEOs that I was interviewing.”

Talk more about this CEO movement.

Robert, I did not come at this as a crusader. I’ve been a journalist since I was nine years old, and I always thought my role in life was more to explain the world

than to change the world. But over the course of the last decade, I was hearing a very different tone in the voices of the CEOs that I was interviewing. I’m sure you were hearing the same thing in your interviews. It was pretty dramatic. The change was in how they thought about their place in society. So, I started writing about this and started exploring why it was changing.

When the Business Roundtable started to explore the same topics, they reached out to me. We had some research that we shared with them. When the time came, they let me talk to some of the leaders who had driven the change of the Business Roundtable.

I wrote a cover story for Fortune Magazine on the roundtable change. I don’t think they led the change; I think they sort of ratified the change as something different was going on in business. And they felt the need to rewrite the purpose of a corporation statement.

While there are different terms, one of the more meaningful is Conscious Capitalism. Talk about how that started.

I think John Mackey, CEO of Whole Foods Market, was one of the earliest people in this movement. John Mackey was actually fundamentally a very politically conservative person, but he felt like the principles of business needed revision.

Over the course of the decade, particularly after the Great Recession, you heard more and more people talking like this. Bill Gates gave a much-noted speech at Davos in 2008. It was the year he was stepping down as CEO of Microsoft before he started his focus on charity.

He started talking about “creative capitalism.” Michael Porter, a famous professor at Harvard Business School, started talking about “shared value capitalism.” Marc Benioff in California was talking about “compassionate capitalism.”

“In the Fortune 500 today, more than 85% of the value is intangibles.

It’s intellectual property. It’s the brand value. It’s all things that aren’t tied to physical capital nearly as much as they’re tied to human beings. It’s your employees who walk in and out the door every day. It’s your customers who you’ve built up these relationships with.”

All of a sudden, everybody was trying to put an adjective in front of capitalism, which they felt like they had to do. We had to modify it; we had to do a better job showing its benefit to society. Mackey was there first, but what happened over the course of the decade was more and more people jumped on that train, until finally in 2019, the Business Roundtable said “yes, this is what we’re supposed to be doing.”

Talk about the concept of Tomorrow’s Capitalist and what you see as the future of capitalism.

This is really what the book is about. And this is why I spent so much time on the book because I wanted to understand, is this just a fad? Is this a trend? Is it

Alan Murray talks about the future of facts in the 191st Landon Lecture at Kansas State University. Photo by Abigail Compton, Collegian Media Group.





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just a sort of a moment in PR, where businesses are talking about their positive social impact? Or is there something more fundamental going on?

So, I spent a lot of time looking at some of the drivers and the resulting change. For example, if you look at the balance sheets of Fortune 500 companies 50 years ago and ask where the value is coming from in these

companies, you would derive that more than 80% of the value resided in physical stuff.

It was plant equipment, it was oil in the ground, it was inventory on the shelves, and all stuff that you needed financial capital to buy. If you had it, you had value. That makes sense in the world of 50 years ago. Your primary focus would be the shareholder because

those are the people who are providing you the money to buy the stuff.

If you do the same exercise today, look at the balance sheet. In the Fortune 500 today, more than 85% of the value is intangibles. It's intellectual property. It's the brand value. It's all things that aren't tied to physical capital nearly as much as they're tied to human beings. It's your employees who walk in and out the door every day. It's your customers who you've built up these relationships with. Those are all much more human-centered sources of value. I think what's really happening and driving this change in focus and purpose is a recognition of the more human-centered value of today's corporation, and that's very different from the 20th-century corporation.

“What we need to make businesses successful is better people, people with human skills, the skills of inspiring, motivating, and thinking about asking the right questions.”

A colleague at Fortune, Geoff Colvin, says that in some ways 20th century business was all about making people into better machines—you were just a cog in that grand production line. And scientific management was all about making you work in a repeatable, predictable way. Well, in the 21st century, it's increasingly becoming clear that the machines are going to take care of themselves, and they're going to be smart enough to do what they need to do.

What we need to make businesses successful is better people, people with human skills, the skills of inspiring, motivating, and thinking about asking the right questions. All of this focus on a new purpose for the corporation is, in my mind, just an extension of making business more human.



Alan Murray is CEO of Fortune Media. He oversees the business and editorial operations of the independent media company and is known for expanding its digital and conference franchises. Murray also writes a closely-read daily newsletter for Fortune, *CEO Daily*. Prior to joining Fortune in 2015, Murray led the rapid expansion of the Pew Research Center's digital footprint as president of that organization.

Before that, Murray was at the *Wall Street Journal* for many years, serving as deputy managing editor, executive editor online, Washington bureau chief, and author of the *Political Capital* and *Business* columns.

He served for several years as Washington bureau chief for CNBC, and cohost of the nightly show *Capital Report*. He is the author of multiple books, including *Showdown at Gucci Gulch: Lawmakers, Lobbyists, and the Unlikely Triumph of Tax Reform*.

FORTUNE



Striving for One America

Byron Allen—Founder, Chairman, and CEO of Allen Media Group—shares his personal connection to Dr. Martin Luther King Jr.’s family and vision along with his perspective on how they translate to a better America—One America. President of Weather Group Tom O’Brien explains the innovations the company is making in the media industry.

Interviewed January 12, 2023

Robert Reiss: When you spoke with Martin Luther King Jr.'s widow, how did that inspire you?

Byron Allen: Coretta Scott King and Dr. King's whole family paid the ultimate price. He was a young man with little children when he was assassinated in 1968. Mrs. King had to move ahead and still be a mother. I look back and remember the things she told me—how she loved and believed in her husband as a father and as a leader.

Dr. King spoke the truth. He said it like it was. In many ways, it still is like it was, and that is sad. It is sad that today, in the 21st century, we still fight for fairness and an end to systemic racism. Mrs. King was a dear friend, and her actions inspired me. She picked up the torch and kept moving forward, never letting anything stop her—even in the face of deadly mobs and threats. That's inspiring to everyone, even today.

Explain your vision of One America, especially from your close relationship with Dr. King's family. Do you feel achieving this is a possibility in the near future?

Byron Allen: Yes, it's possible. Of course it is. It has to be. However, if it keeps going like it's been going the last few years, we won't be a country anymore. We'll be a divided battleground. We all watched what happened on January 6, 2021. And One America is not a new concept. We joined together to unite the 13 colonies back in the 18th century; but it wasn't really equal for everyone, was it? We all know what happened.

Then along comes Abe Lincoln, the Civil War... but even after all that, it still wasn't One America either. Freed slaves became a liability. Prior to the emancipation, what were the slaves? They were an asset to big plantations. They were the work force. They were part of the economics. They were counted

and monitored. Their work was the engine. But when that all ended and they were free, they became a liability. That's when the business end of everything really came into play. That's when the two Americas really began.

"Mrs. King was a dear friend, and her actions inspired me. She picked up the torch and kept moving forward, never letting anything stop her."

Martin Luther King focused on the business of racism. That struck a nerve. Economically, there is one set of rules and guidelines for white America and one set for Black America. It was very blatant at one time. Segregation had signs, legal papers and a whole infrastructure. "Whites Only. Colored Waiting Area. Colored Entrance in Rear." Jim Crow was ugly, but what people didn't see is what was the most evil. Yes, the KKK and all of that was in the dark, and it killed many innocent people. It scarred this country, and we're still suffering. The rules and systems that Jim Crow laws put in place were never really eliminated. Economic racism, not giving opportunities, and limiting access to finances: it all works to do the same



The CEO Forum Group has selected Byron Allen, Founder, Chairman & CEO of Allen Media

Group and Tom O'Brien, President, Weather Group for the Transformative CEO Award in Leadership in the category of One America: Innovation. This is bestowed for Allen's vision to build a truly great nation and his and O'Brien's work in making The Weather Channel one of the leading innovators with concepts like immersive mixed reality technology.

“Systemic racism is still here, and you can’t even see it. It has to be eliminated. America is better than that. We need to be, and we can be One America.”

thing—suppress people. How many young Black students just couldn’t get a fair chance, no matter how good their grades were? How about young Black business people and entrepreneurs? Think they get the same rates that white applicants get? Not at all.



That’s why I’ve pushed back so hard about Black Owned Media getting a fair and equitable allocation when the advertising business makes the yearly media plans for billion dollar brands. Economic inclusion is what Martin Luther King was talking about, and that’s why he was killed on that balcony. Coretta Scott King told me he was killed because he was exposing how the things we didn’t see were dividing America, how Black people were shut out of economics, quality schooling, fair and equal justice. We’ve seen it ripped open in just the last couple of years all over again, but it has never gone away. Systemic racism is still here, and you can’t even see it. It has to be eliminated. America is better than that. We need to be, and we **can be** One America. Imagine how amazing this great country

will be when every person, no matter what their color, is included fairly? One America. One America.

We’ve spoken about your five Es as the foundation of “One America.” Explain the vision.

Byron Allen: Again, remember, Martin Luther King Jr. had the vision. He took the fearless stand against evil, and he exposed the truth about how Jim Crow laws—laws put in place to exclude Black Americans—were dividing America. Dr. King started to focus on economic racism. That’s what got him killed. America is a business, and he knew that economic inclusion was the only way One America was going to be achieved.

Talk about why you bought The Weather Channel and how it’s a game changer for Allen Media Group.

Byron Allen: When I bought The Weather Channel, it was a game changer for me, my company, and all of our employees. It immediately added technology to our portfolio, which was the main reason why I wanted to make that acquisition.

It also gave me the opportunity to really make a statement about climate change and how deadly it is. It is astonishing to me that in America, the greatest country on the planet, we have allowed politicians to weaponize climate.

We have allowed that to become so divisive, and that is wrong. The weather is the one thing that we *all* share, no matter who or where you are. The innovations coming from the teams at The Weather Channel allow us to really tell better weather news stories using that amazing technology. Science and numbers do not lie. We can all see the stats. We can all see the extreme weather conditions we have experienced just in the last few years. It is so important to make sure

that the whole audience “gets it.” Making complex science and meteorology simple and understandable is the key.

“We are inviting viewers to take a closer look at the world around them, how it is changing, and how they can plan for those changes.”

With our IMR, Immersive Mixed Reality, we are adding a little “Hollywood” to the storytelling. We’re making it very visual, but that makes it interesting to a much wider audience—and to a younger audience, too. Today’s young viewer will be tomorrow’s daily audience member.

We are inviting viewers to take a closer look at the world around them, how it is changing, and how they can plan for those changes. And, also, when it is life threatening, how they can be safe. At The Weather Channel, we are helping to save lives. We’re helping to protect people and their families and homes. The best way to do that is to use our technology and innovation to tell better, more visual stories. When people see it, they get it.

One of the most powerful innovations we’ve developed through our technology team at The Weather Channel is Local Now. It is the world’s first super app. Whether you have it on the home screen on your device, on your TV through Roku, other OTT platforms, or on your mobile phone, Local Now is your go-to for weather, traffic, lite-news and entertainment.

We have over 450 “fast channels,” and we are adding more every day. We just completed a milestone deal with PBS to carry their amazing content on Local Now. It’s completely free, and people are loving it! It travels with you and gives you the information for the area where you are located. Get off a plane in Chicago,

and you’ve got your local traffic and weather. What more do you think about when you land at an airport besides where to pick up your luggage at baggage claim? Everyone needs that information: land at JFK, LAX, Miami—and Local Now will download the local information and data for that area. You’ll also have thousands of hours of movies and TV shows, and it’s all free. Isn’t “free” everyone’s favorite word? Local Now is available for download on the app store. That’s what innovation is doing for the audience from Allen Media Group.

Tom, explain the overall business model of Weather Group and your relationship with Byron Allen.

Tom O’Brien (President, Weather Group): Weather Group consists of The Weather Channel Television Network, a business founded in 1982 by Landmark Communications and now owned by Byron Allen. I work for Byron and basically run The Weather Channel television network. Our network is fully distributed across the United States. We have a television network; we have an OTT streaming app that provides the ability to watch The Weather Channel in every household in America; we have The Patrnr Show, our relatively new Climate Network; and we have The Weather Channel en Español, a Spanish language Weather Service launched in the spring of 2022—the first one in the country.

Talk more about Immersive Mixed Reality technology.

Tom O’Brien: Immersive Mixed Reality is a product that was developed in house here, and it is a really neat technology that enhances our storytelling for the teams. We had some of our graphic design team sit down and say, “How can we reimagine the way we present weather?” One great example is the gaming industry. No one has done more from a standpoint of visualization in video than the gaming industry. So, can we use gaming technology to create new opportunities for weather presentation?

Byron Allen



LEFT: Byron Allen pictured with Warren Buffett

BELOW: Byron Allen at fourteen years old pictured with Jimmie Walker and David Letterman in a 1975 comedy writing session



“Our hope is that next time you’re watching The Weather Channel, and you’re told to evacuate because there’s a storm surge coming, you will see our graphic and make a more educated decision.

Typically, our team would go to a market like an NAB or a CES to buy products that were designed for the television industry. But what if we brought our own partners in? That allowed us to go from what we call a “man in the map” presentation in weather to a much more dynamic nature. We basically started this technology with cinematic experiences.

What’s an example?

Tom O’Brien: The storm surge is a great example. We talk about storm surge a lot, particularly during the severe weather season. Obviously, the United States

has a lot of coastline, and a lot of people are affected. I myself was kind of guilty of underestimating what storm surge is. You know, a foot of water, it gets your ankles wet, right?

Well, with this technology we are able to three-dimensionalize what storm surge does, and show the dangers properly. A foot and a half of water could float a car. A foot and a half of water will take your kids’ toys in the backyard and float them with other debris. So, when you start to get to three, four, or five feet, you really understand how dangerous this is.

Our hope is that next time you’re watching The Weather Channel, and you’re told to evacuate because there’s a storm surge coming, you will see our graphic and make a more educated decision. So, we’ve done that with tornadoes, flooding, ice, and a whole host of very relatable weather topics.

The second generation, and you’ll see this, is where we can bring weather conditions “into our studio” using

Founder, Chairman & CEO, Allen Media Group

the three-dimensional technology and advancements in what we've done with our immersive mixed reality. We call this product "virtual views." We can actually visualize rain, snow, sleet, and bring that into the studio. With our virtual set, we can put an anchor in any city in the United States and accurately show the weather conditions.

What is your advice for other CEOs looking to foster innovation?

Tom O'Brien: One of the benefits of starting my career at GE was that, as a young manager, I trained with Jack Welch. I remember him saying, "Your job is to break your business before your competitor does." Implementing this comes down to three factors as a leader: courage, curiosity, and really innately knowing your business.

If you can think of one word that codifies your leadership philosophy, what would that be?

Tom O'Brien: Maybe not a word, but as a statement, "not being afraid to run towards change" is probably a good way to characterize my philosophy. I think having that confidence and conviction lets your people know that it's okay—that that's the mission. I think it sets the stage for everything else.



Byron Allen is Founder, Chairman, and Chief Executive Officer of Allen Media Group. His companies are constantly finding new and exciting ways to engage 200 million subscribers. He looks at media from a performer's point of view to advance storytelling and entertainment.



Tom O'Brien is the President of Weather Group—the parent company of The Weather Channel television network—and its streaming platform Local Now. He also serves as EVP of Allen Media Group. As a long-time TV and digital business exec, he has a strong record of driving innovation and growth.



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KEEP GETTING BETTER



The Heartland Family

A culture journey built on trust

By: G. Scott McComb | Chairman, President & CEO of Heartland Bank

Building a quality corporate culture is much harder and takes longer than one might think. The process never ends for those committed to creating and maintaining such strong conviction to associate and company core values. Once established, empowering the troops to be culture carriers can further expand depth within your ranks. You're going to need those carriers to keep up with your tremendous growth and the opportunities that culture building creates.

Center for Character Ethics

Heartland has always had a culture of quality service, community commitment, and a sense of family. However, we were not always considered a high

performing bank in relation to some of our peers. That was all about to change just as the economy and the bank were emerging from the Great Recession of 2008–2012. We were nominated by the BBB of Central Ohio to receive their Center for Character Ethics Award in January of 2012. This involved preparing a video, creating a press release, and attending a banquet where we received a shiny trophy. Another aspect to the process was an all-associate survey on character ethics. Does the leadership behave ethically? Are we an ethical company? Do we treat clients and the community in the right way? All good questions, but I wanted to go further and ask more about how we were doing internally. Was pay



fair? Do associates feel challenged? What do we do well, and conversely, what might we do better?

The initial results were, to say the least, not that good. While our associates thought we were an ethical company, and participated well in the community, they were not so happy within the ranks. There were countless things we could do better including career pathing, eliminating non-performers, increasing benefits, communication and management abilities. Needless to say, it took a good few weeks to digest the results, and I dreaded sharing this with my management team. Frankly, I was in shock.

The commitment to the journey

So, what do you do with a bag of lemons? You make lemonade. I decided that the only way to confront these findings was to establish some ground rules:

- Ask the tough questions about your culture.
- Bring yourself and your management team to own the results.
- Share every word of the feedback with every associate, confirm/clarify.
- Provide meaningful dialogue and action on the results.
- Never stop asking or acting on the results.
- REPEAT.

In that first few years, we were able to have a great deal of small wins since we had not been listening at all in years prior. As we entered year three, we started seeing meaningful change in the hearts and minds of our associates as they could see the cause and effect of the process. We found that they greatly appreciated the honesty and candor.

My management team would wait with bated breath for the results each year so that they could see what progress we were making. I would release the findings to my management team on a Friday afternoon, late in the day so they could stew over it on the weekend. “Go kick the dog, drink or take a good run, then reread the comments so you can truly hear what our associates are saying; we can discuss them in our Monday morning meeting.”



Many on the team were in disbelief of some of the comments. It was like some associates did not read anything we tried to communicate; others were very negative toward their supervisor or demanded more training. However, as the years went on, and we became better and better at this process of making our lemonade, the positive comments began to far outweigh the negative ones.

Year after year, we followed the same schedule: create and administer the questionnaire, review results with management, release (all) results to the associates, schedule dialogue in small groups to talk about the results, report back to management on those conversations, make recommendations for change, then announce the changes based on the feedback. The process took three to four months in total, and we improved each time. My senior managers were now truly the culture carriers, and they were on a mission to permeate the company with more of them.

The results

After 11 years of asking, and more importantly listening, our community bank has become one of the highest performing banks in America. Trust in management has never been higher, communication is fluent and concise, our suite of pay and benefits is very competitive, and the dedication of our associates to one another has never been stronger. Further, we have become experts at dealing with the opportunities that adversity creates in the marketplace allowing the bank to succeed in all economic environments.

Legendary management consultant and writer Peter Drucker once said, “Culture eats strategy for breakfast!” It takes strong leadership to face your shortcomings each and every day. The trick is learning from the feedback and acting on it. One of my senior managers, who didn’t make the culture grade by the way, once asked me, “Do you realize the level of risk you’re taking by sharing all of these results with our associates?” To which I answered, “Do you realize the risk if I don’t?”



Scott McComb is Chairman, President & CEO of Heartland Bank in Whitehall, Ohio. Under his leadership, Heartland Bank has grown to over \$1.6 billion in assets and 20 branches. Scott is an entrepreneur who changed his direction to the banking arena after operating several of his own businesses. In 1999, Scott joined Heartland as the Director of Internet Banking, charged with launching the first internet bank offering by a community bank in the Columbus, Ohio area.

Scott has a BA in Sociology from The Ohio State University, and he is a graduate of the Ohio School of Banking, the Ohio Bankers Association Leadership Institute, and the Graduate School of Banking at the University of Wisconsin. He currently serves on eight boards, and he is honored with a handful of awards and recognitions—such as being named to the Columbus Business First Power 100 list of Columbus’ most influential leaders in 2019, 2020, and 2021. Scott is a member of the Fraternal Order of the Elks and is a 33rd Degree Mason—the highest honor in the organization.





Setting the tone for successful leadership

UPS President International, Healthcare and Supply Chain Solutions Kate Gutmann shares her leadership philosophy. It starts with a foundation of trust, transparency, and open dialogue.

President Int'l, UPS Global Healthcare & Supply Chain Solutions

Interviewed December 2, 2022

Robert Reiss: UPS is an iconic company, one of the best-known brands in the world. Describe what is different about the UPS model that sets this company apart from other global logistics providers?

Kate Gutmann: Most people know UPS by our brown delivery vehicles and our uniformed service providers in more than 220 countries and territories around the world. Our company and high service performance have been part of the social fabric of most communities for well over a century. But there is a lot more to UPS that people may not see.

UPS's global smart logistics network is a technological marvel that facilitates end-to-end supply chain services, providing customers with full visibility into their package movements on the ground, in the air, on the ocean or by rail—all modes from packages to pallets and around the globe. We also offer specialization by industry, such as our demonstrated expertise in Healthcare. Our network offers shippers unmatched flexibility so that our business customers can provide their own customers with world-class service. This is a competitive advantage for them.

We also help our business customers address their supply chain design, which is a boardroom topic given geo-political strains, inflation and other factors. Our team of supply chain logisticians and technology professionals connect with our customers to innovate global solutions, enter new markets and build in safeguards to ensure uninterrupted shipments.

Our customers tell us consistently that we have one other big differentiator, and that's our people. We're known for our dedication, integrity and determination. Our people are tireless and truly unstoppable. Their commitment never waivers. I saw it on Day 1 and still see it today in our teams around the world. It's how we win the trust of our customers and the communities where we work and live.

Talk about your specific roles and key responsibilities.

UPS's businesses earned nearly \$1 billion in revenue for 2021. I manage the International small package business, Global Healthcare Division and Global Supply Chain Solutions. Under the direction of UPS CEO Carol B. Tomé, our leaders around the world work together to ensure we deliver a world-class experience for our customers.

Prior to taking this operating role, I led our global revenue for the company as well as the UPS Healthcare Division for the last three years. I am so proud of the UPSers who power our performance. Healthcare companies depend on us to provide quality warehousing and to navigate all transportation modes anywhere in the world.

Reliability is our differentiator. You saw it with the delivery of COVID-19 vaccines as UPS delivered 1.5 billion doses in 110 countries with 99 percent on-time performance. No one else can make a claim like that. As a result, customers now trust us to take on shipments that are even more complex, such as logistics related to clinical trials, cold chain



The CEO Forum Group has selected Kate Gutmann, UPS EVP & President International, Healthcare and Supply Chain Solutions, for the Transformative CEO Award in Leadership in the category of Supply Chain. This is bestowed for Gutmann's leadership in creating a global model of trust, transparency and unparalleled operational excellence to deliver the world's foremost supply chain solutions. This is of particular importance during these times of unparalleled supply chain challenges globally.

capabilities for biologics, global solutions for medical device companies and so much more. And we continue to innovate and expand our capabilities. For example, we recently purchased Bomi, an industry-leading multinational healthcare logistics provider. The acquisition added temperature-controlled facilities in 14 countries and nearly 3,000 Bomi team members to the UPS Healthcare network in Europe and Latin America. The transaction expanded our cold chain fleet capability faster and further than we would have done if we had built it out ourselves.

Our International small package business is a key part of our global smart logistics network with expansive reach, top performance and efficiency. Our global integrated network provides our customers with cost efficiencies and a stronger footing to compete. Add in our full suite of global supply chain services, and UPS can help customers design and optimize their businesses to win more.

The combination of these UPS businesses unlock synergy for our customers and our stakeholders.

I am honored to lead the International, Healthcare and Supply Chain Solutions team arm-in-arm with the rest of the UPS executive leadership team to deliver one UPS capability and service to meet any logistics challenge anywhere in the world.

How would you define your leadership philosophy?

My leadership philosophy starts with trust, transparency and open dialogue. It's important to set that tone early. I want my teams to overcome any fear of failure. When they stumble, I encourage them to focus on the next step. I want them to tell me all the news I need to know – not just the good news. I encourage self-accountability, problem-solving and dot-connecting. It's also incredibly important to assign the right people to the right roles to maintain a diverse and inclusive team so that we always have broad perspectives.

I believe that clear direction and results management lead to better outcomes for all. This enables the business leaders to take care of the day-to-day while keeping an eye on the horizon. Clear direction today creates an environment to innovate so we thrive for years to come. I also believe it's my job to listen carefully, to spot potential synergies and to unlock their value.

“My leadership philosophy starts with trust, transparency and open dialogue...I want my teams to overcome any fear of failure. When they stumble, I encourage them to focus on the next step.”

Time management may sound basic, but it is crucial, especially with the global and complex role I have. It's important to bring your full self to every interaction and for you to be present in each moment. To ensure I do this for work and for family, I am a master at time management.

Overall, leadership is about human connections, and it comes down to trust, transparency and open dialogue to ensure we all work to a common end and deliver for the company and our customers. That's the foundation of good leadership.

What is your personal North Star that guides your decisions in life and business?

Faith, Family, Friends and Focus.

The order was a little different early in my career. I've refined it through experience and personal reflection, but it's always been about making a positive impact on those around me. In my work, regardless of my job title, my purpose is UPS's purpose: Moving our world forward by delivering what matters.

President Int'l, UPS Global Healthcare & Supply Chain Solutions



How has UPS facilitated your ascension to the C-suite? How has UPS kept you inspired along the way?

I began my UPS career in college as a marketing intern but found myself doing cold calls and face-to-face meetings with customers. I fell in love with solving problems for our customers by connecting them to the right UPS capability globally. That's what inspired me then and continues to inspire me today.



When I was just four years out of college, UPS gave me the opportunity to sell internationally in Japan. The UPSers I met in Asia shared a commitment to our customers. Though I had never met them, they seemed like familiar teammates from the start. This is the UPS difference.

UPS's portfolio provides all the ingredients for an unmatched solution. One solution leads to the next, creating a flywheel effect. As the impact plays out, customers see that UPS helps design solutions and that we also are involved in the implementation and ongoing adjustments for years to come. We are committed to delivering mutually beneficial outcomes, and we do.

Supply chain is a key issue these days for all businesses. How should CEOs be thinking about their supply chains?

Supply chain design, speed and efficiency is a Boardroom discussion. CEOs can benefit by bringing a trusted partner like UPS into the conversation to evaluate how best to navigate the changing market and geopolitical strain.

CEOs should carefully examine sourcing strategies, labor availability, inventory practices, geopolitics and government regulations. They should understand vulnerabilities for their business continuity plans, consider just-in-case inventory for short-term supply disruptions and identify alternative suppliers for long-term disruptions.

The UPS Global Solutions team has expertise in supply chain optimization, engineering and information technology. We are trusted advisors who can design a solution for almost any supply chain problem and oversee its implementation.

What do CEOs need to know about China as it relates to supply chain?

“UPS's portfolio provides all the ingredients for an unmatched solution. One solution leads to the next, creating a flywheel effect. As the impact plays out, customers see that UPS helps design solutions and that we also are involved in the implementation and ongoing adjustments for years to come.”

President Int'l, UPS Global Healthcare & Supply Chain Solutions

In the last five years, we have seen companies encounter a variety of pros and cons to sourcing from China. With the lockdowns that have played out over the last six months, companies have had to act fast to build redundant distribution and alternate sourcing strategies.

This complexity continues, and our global solutions team is engaged in these design-and-execution strategies with companies around the world.

Regardless of the market, concentrated risk in a supply chain is a problem. To mitigate these risks, the best supply chain companies are implementing sourcing strategies that build in supplier diversification and market reliability.

Top sourcing locations growing in importance outside of China include Mexico, Europe, Vietnam and India. Many companies are also investing in technology to overcome labor challenges.

“When I believe in something,
I am all in. This is a common
trait among UPSers. We are cut
from that same cloth.”

What is one thing you want our readers to know about you?

When I believe in something, I am all in. This is a common trait among UPSers. We are cut from that same cloth. We work every day to demonstrate what Jim Casey, our founder, stated, “Determined people working together can accomplish anything. I agree. We are unstoppable, and we continue to move our world forward by delivering what matters.”



Kate Gutmann is UPS EVP & President International, Healthcare and Supply Chain Solutions, and a member of the company's Executive Leadership Team. She is responsible for global sales, solutions and customer engagement while also overseeing UPS Global Healthcare. Kate serves as a Board member for Brown-Forman Corporation and is also on the Audit Committee. Kate has participated in the World Economic Forum for many years and is on the Board of Stewards for Trade Technology. She is also co-founder of the UPS Reading Clubs at the Boys & Girls Club of Metro Atlanta.



Politically inspired steps to help CEOs prepare for high-pressure moments

Corporate lessons inspired by this year's congressional speaker vote

By: Diana Muggeridge | Campaign Strategist at Purple Strategies

People across the United States were captivated at the start of the new year by the spectacle in Washington around the election of Kevin McCarthy as Speaker of the House. Throughout the high-profile vote, onlookers saw everything from elected officials taking steps to govern on behalf of the American people, poking fun at their colleagues, and certainly, taking opportunities to raise their own political profiles.

By and large, the operations of corporate board rooms are much more purposeful than what was on display in the Congressional Chamber. But even this hyper-politicized event can teach business executives about how to lead through high-pressure situations.

There are clear parallels between the roles of elected officials and CEOs, showing why the two can borrow from each other's playbook. For starters, both need to navigate the interests of a broad range of stakeholders. For politicians, it may be political opponents, members of their own party, constituents, or community partners. Executives, in turn, are managing the needs and expectations

of their investors, customers, business partners, employees, and government officials. The public has always entrusted politicians to serve society writ large, and increasingly, that's been an expectation of business leaders, too.

Both sets of leaders are also doing their jobs under a microscope. Whether their every move is being cast via C-SPAN and analyzed on Twitter or dissected on Squawk Box, leaders are forced to manage issues much more publicly than ever.

“Nearly 4 in 5 informed Americans expects companies to speak out on societal issues.”

Purple Strategies was born of this idea that companies were finding themselves in more dynamic and campaign-like environments and that by bringing perspective and campaign-inspired strategies from the blue and red sides of the political aisle, we could help them navigate that new world order. Today, we

help companies and executives every day doing just that, applying diverse perspectives and the principles of politics to help solve complex issues and drive businesses forward.

Here are five actions CEOs can take to prepare for their own high-pressure moments:

Codify your party platform. High-functioning political operations have a clear party platform that guides candidates' policy priorities and campaigns. The same principle is true for companies. Building consensus and working through thorny challenges relies on having a solid foundation of the mission, values, and goals that undergird an organization and are greater than any one individual.

Be authentic and purposeful. Strong leaders can adapt when situations require them but are steadfast when it comes to their priorities and core identity. At Purple, we work with leaders to build an executive framework that helps them stay true to these qualities, regardless of the situation. Central to each framework is an executive identity or persona that's based on a thorough landscape review and becomes an authentic, differentiating, and aspirational characterization of that leader's style. The framework also includes pillars outlining the themes and topics that the leader wants to keep in-focus. Especially in high-pressure situations, executives turn to their frameworks to ensure they act in a way that's on-strategy and true to their leadership.

Execute a campaign-inspired activation plan. Much like being a member of Congress, advancing priorities, building coalitions, and getting ahead of issues before they become a problem, all come with the job of CEO. What's different is corporations don't have an election day, which can lead to no or slow action by companies on emerging issues. That's why crafting a plan to consistently engage important stakeholders, credibly act on priorities, and respond to headwinds is so important. Advance planning around these factors becomes an antidote to inaction and helps executives

get ahead of roadblocks to their agenda.

Conduct scenario planning. Scenario plans are an essential part of any political campaign and business plan, and they should be part of every CEO thought leadership plan too. Taking time well in advance to anticipate scenarios the leader could face and planning the messaging and contingencies to use, if needed, helps streamline decision-making and avoid costly missteps.

Prioritize communications training. Across the public and private sectors, the most effective persuasive speakers are so compelling because they practice. Beyond regular traditional media trainings, politicians also spend hours in debate practice and receiving coaching on how to clearly drive a message across formats. Applying these same tactics with executives works seamlessly to help them also communicate in a way that's engaging, memorable, and in support of their business goals. Amazon Board Member and Former PepsiCo CEO Indra Nooyi said, "You cannot overinvest in communication skills...If you cannot simplify a message and communicate it compellingly, believe me, you cannot get the masses to follow you." CEOs' schedules are notoriously busy, but making time to sharpen how they communicate is worth it given the stakes.

As much of a circus that politics can be, there's a great deal CEOs can learn from it. To read more about Purple Strategies and how we help companies and their leaders manage these new political realities, visit purplestrategies.com.

PURPLE

STRATEGIES

Diana Muggeridge is a campaign strategist at Purple who's passionate about her work helping industry-leading organizations navigate challenges impacting their license to operate. Diana works closely with her Purple colleagues to execute strategic campaigns designed to preventively plan for and respond to these complex challenges.



Strength through diversity

As Chairman and Chief Executive Officer at IBM, Arvind Krishna has been an outspoken advocate for learning, diversity, and innovation. With many of his own personal contributions to the industry, he is dedicated to empowering his employees to forge their own paths and possibilities.

Interviewed August 30, 2022

Robert Reiss: In 2021, 41% of your hires were women. How has IBM been ahead of the curve before you even joined the company, and before other companies were even focused on diversity?

Arvind Krishna: We've had a long-standing commitment to diversity and inclusion. We had a mandate on equal employment in 1953—that's 11 years before the U.S. Civil Rights Act. We included sexual orientation in our EEO policy almost 30 years ago. We have been doing pay equity analysis to make sure that all IBMers receive equal pay for equal work, and we've been doing that since the 1970s. And all that is done statistically, not just by intuition and managers. Now, over the past two years, as we have confronted a social justice crisis, we are focused on two fronts: first, strengthening the workplace so that IBMers can bring their authentic selves to work; and, second, we'll use our influence on policy—not with money—to address long-standing social injustices, accessibility gap, and socio-economic differences in the communities that we serve.

We also provide inclusion training for all of our employees. More importantly, for our leaders, we have business resource groups that I really recommend to all my peers to have in their own companies. We have career accelerator programs, we recently added a diversity modifier to our executive compensation program, and we conduct monthly reviews of diversity data, including with our board of directors.

Year over year, we have grown the percentage of women and underrepresented minorities in our workflows. We are proud of where we are, but we will also acknowledge we have more work to do. So I want to be clear: this is a continuous journey, nowhere near finished. We want to double down on our tradition of advocacy. We have sent letters to the U.S. Congress and the President, advocating for



The CEO Forum Group has selected Arvind Krishna, Chairman & CEO, IBM for the

Transformative CEO Award in Leadership in the category of DEI. This is bestowed for IBM's role as pioneers of DEI decades before the term was used, and Krishna's current practices that have made diversity, equity and inclusion the core fabric of IBM's culture and philosophy.

racial justice, police reform, and the expansion of economic opportunities. We advocated for passage of anti-hate crime legislation in the United States, we have stated publicly that we will no longer offer general purpose facial recognition, given all the issues around ethnic ethnicities on that one. And to build greater equity across society, we like to lead by example.

One example I want to call out is on skills. We are collaborating with over 100 academic and industry partners. And we have set an explicit goal to provide 30 million people with new skills by 2030. They're investing hundreds of millions in our apprenticeship and Nucala programs. We are proud to be members of IIO, led by many of our peers, to hire and promote one million Black Americans into family sustaining jobs so we can go on with our history. It is a continuous journey. We take pride in where we are, but we have more work to do.

Let's talk about being a company of purpose and what it means to you personally.

Purpose is what attracts people to come work here, which includes me, and we have an amazing legacy of contributions. We helped launch the U.S. Social Security Program by doing all of the record keeping required for it. We helped computers because they

were required for all of the inventory management and some of the emergencies on the moon landing program by NASA.

We are helping researchers, using computation from us, to find a cure for COVID. So we continue to see the strength and appeal of purpose. And we can see that with the four million applicants that we have in our database of people who would like to join IBM.

“Year over year, we have grown the percentage of women and underrepresented minorities in our workflows. We are proud of where we are, but we will also acknowledge we have more work to do.”

Now, it's not enough to own the work you do. You also have to give your employees the opportunity to learn and to grow through their careers. And so we really push on having a growth mindset. This is a belief that we all have an enormous capacity for growth, and learning has to be a continuous process. Important skills that used to have a half life of 30 years now have an average of just six. That means we are all going to make 567 career transitions, maybe small ones, or maybe big ones, during our lifetimes.

Focus on skills development, career mobility, and flexibility are really important. The second part of your question, “what does it mean to me to be a company of purpose?” I think it's best summed up with what we try to explain ourselves inside. We want to be the catalyst that makes the world work better. So let me unpack that: a catalyst is an agent of change. A catalyst helps release new energy, empowering outcomes. And that's what being an IBM'er is all about.

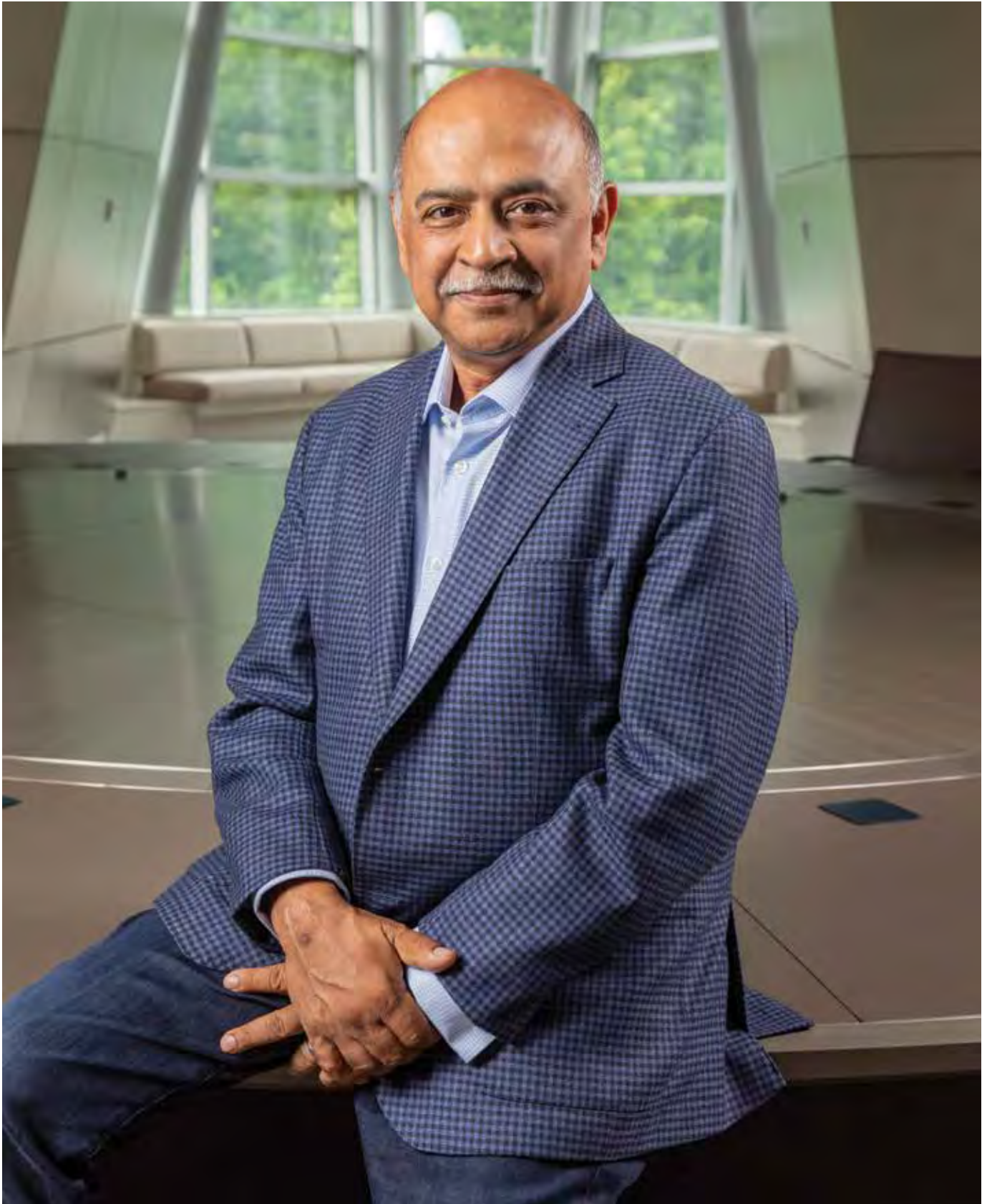
We want to bring technology in service of our customers and to unleash their businesses to scale better and work better. And so, you forge partnerships, bringing together people and technology.

When we think about electrical grids, today's world of net zero on carbon airlines, mobile networks, banks, payment systems, transportation systems... we are not the end provider of any of those, but we work with those providers. That way they can bring much higher quality, much better speed, and much more of what their end customers want. And these are the systems that support modern society. So ask yourself, how are we capitalists? And what can we do to make the world work better? I think to me, that is what being a company with purpose means.

IBM has made such an impact around supplier diversity. How does this effort fit into your overall integrated strategy at IBM?

Purpose and profit go together now. We call it diversity in our supply chain, and it is actually good business because it enhances our competitive advantage. It also stimulates growth in the supplier marketplace. And that is good for all of us. It's been a formal priority for us at IBM since 1968. That's when we formally established a program to build a supply chain that reflects the different places where we do business.

“We continue to see the strength and appeal of purpose. And we can see that with the 4 million applicants that we have in our database of people who would like to join IBM.”



“We want to be the catalyst that makes the world work better.”

We are a founding member of the responsible business alliance, the RBA, a nonprofit industry group that helps our members strengthen social, environmental, and ethical responsibility. We require all of our first tier suppliers to adhere to the RBA code of conduct. We gave training last year to more than 34,000 representatives of importers and suppliers.

Can you talk about developing, growing and retaining women in tech in the STEM areas?

It's about giving people a purpose, a career pathway, role models, and viable reentry into the workforce. Women make up about 30% of executive leaders

today. And I picked that just as a proxy—executive leaders shouldn't be made to be the end-all of any particular metric, but it's a metric, because they are the role models for many people in the organization. And we were not always at 30%. A few years ago, we were in the mid-20s. If you go back years ago, we were in the low-20s.

Now, how do you make progress? You look one level below, because that's your internal pipeline. You look outside your organization, and you establish easy pathways for reentry. For women in particular, we know that many will often take four or five, maybe 10 or more years to look after their family, for many purposes. It's not just mothers.

Women also take a disproportionate burden on looking after elderly care. So, when people take those years out, how do we give them a pathway



back? Maybe people have a lot of skills, but they need a little bit of a gentle reentry in the form of boosting their self-confidence and self-esteem when they reenter, even though they already have all the skills. I think that there is so much to be done in our educational systems globally—and it's not a U.S. statement alone—on how they can better address the needs of women entering and reentering the workplace.

“You have to incentivize leaders and hold them accountable. In our case, we put a diversity modifier publicly disclosed on our executive compensation.”

What are your thoughts on the future?

I think it's always very simple and always “let's focus on outcomes.” Otherwise, it's just a long list of activities that will result in no improvement. Number one, it is recognized as a never-ending journey, but let's make sure that we all have accurate data, that we all look at the data the same way, and that the diversity data is transparent, is subject to regular review and gets published. Second, you have to incentivize leaders and hold them accountable. In our case, we put a diversity modifier publicly disclosed on our executive compensation. Third, I believe we must prioritize skills-first hiring, as opposed to having degrees as a proxy for skills.

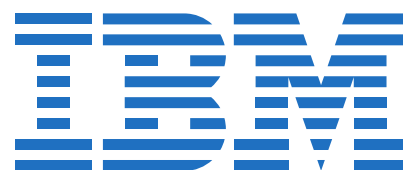
62% of people in the United States do not have a bachelor's degree. But, we believe 50% of our jobs can be filled with skills that do not require a particular degree. And if that's the case, and you go back to my statements earlier about half life of skills of six years or less, then people are going to have required skills in any case. So, skills first, accurate data, and the right incentives in place for compensation.



Arvind Krishna is the Chairman and Chief Executive Officer of IBM. As a business leader and technologist, he has led the building and expansion of new markets for IBM in artificial intelligence, cloud, quantum computing, and blockchain. He has also played a significant role in the development of innovative IBM products and solutions based on these emerging technologies.

In his 30-years at IBM, he led a series of bold transformations and delivered proven business results. He previously was senior vice president of Cloud and Cognitive Software, head of IBM Research, and general manager of IBM Systems and Technology Group's development and manufacturing organization. In 2016, *Wired Magazine* selected Arvind as “one of 25 geniuses who are creating the future of business” for his foundational work on blockchain.

Arvind has an undergraduate degree from the Indian Institute of Technology, Kanpur (IITK) and a Ph.D. from the University of Illinois at Urbana-Champaign. He is the recipient of distinguished alumni awards from both institutions.





Leading a family company into the future

Omaha Steaks Chairman & CEO Todd Simon dives into his family's long-lasting values surrounding customer experience. These tenets have driven Omaha Steaks through innovations, expansions, and challenges like COVID-19—all centered around the integrity nurtured by the Simon family.

Interviewed: October 17, 2022

Robert Reiss: What was it like growing up in the Omaha Steaks family?

Todd Simon: Omaha Steaks is a fifth-generation family business that my great-great-grandfather started in 1917. One of the things about growing up in a family business is that there's no such thing as just family time or just business time. When I was a kid, my dad, his brothers, and my grandfather would talk about business at Thanksgiving dinner. It was as if every family meal was a board of directors meeting. My dad took me to the office with him on Saturdays when I was growing up, and some of the things that permeated my life are really the things that permeated the business.

How about the lessons you learned from your family?

I've certainly learned from, and carried through, several family lessons. First is the power of consensus. We always knew it was important for the family to be unified on key decisions. Sometimes these were decisions championed by a family member and sometimes by another non-family professional on our team—but no matter what, the family needed



The CEO Forum Group has selected Todd Simon, Chairman, and CEO of Omaha Steaks, as the recipient of the Transformative CEO Award in Leadership in the Corporate Gifts & Recognition category. Mr. Simon is the 5th generation leader of the company that pioneered food delivery and is recognized for his significant efforts in making their exceptional products one of corporate America's most beloved gifts.



LEFT TO RIGHT: Former and Current Family CEOs
Alan Simon, Fred Simon, Bruce Simon, Todd Simon

to be of one mind to move major ideas forward. We would either reach consensus easily, or we might have to lock ourselves in a room for half an hour and yell at each other. Whatever the method, an aligned family point of view has been critical to moving the business forward—especially combined with a diverse and dedicated management team.

“We’re control freaks in the sense that we directly manage every touchpoint with the customer and with the quality of our products.”

Another significant lesson is on customer experience. My dad was always very thoughtful about the customer's experience, and since I came up under him, I learned how this is at the core of what we do every day. Quality, service, and the invention of our 100% guarantee were all things that my dad instilled as critical to our organization. He also emphasized how the culture of the business is so important and foundational to helping us grow over the years.

Talk more about the customer experience and, for example, the impact of being vertically integrated.

We're control freaks in the sense that we directly manage every touchpoint with the customer and with the quality of our products. Everything from manufacturing to sourcing the raw materials to cutting the steaks, packaging them, and flash-freezing them. We run our own distribution centers, so we hand-pack every shipment. We also have our own in-house marketing team, and we even wrote the code for our website and the CRM system that our telephone agents use.

All of this gives us a long-term, sustainable competitive advantage because we're not only fully integrated with the customer's experience but also fully integrated into our accountability throughout the company for delivering a high-quality customer experience.



This vertical philosophy also allows us to make decisions a lot quicker. We can wake up in the morning and say we need to change something and then immediately work to change it. Over the years, we've added more processes so it's less impulsive and more thoughtful, mainly because we know we have limited resources and must make choices about our priorities. However, we do keep a running list of things that we want to change and improve on; we constantly slot things from this list in and work on them methodically so that we can make sure we test and understand how they positively impact the quality of the customer's experience.

One of your fastest-growing areas is corporate gifts. Describe the business model.

We like to view our corporate gift business as a solution provider. It starts with the backbone of excellent gourmet food products we have perfected over the past 100+ years. From there, we built solutions with our clients in mind.

I like to put myself in the shoes of my peers and think about what challenges they face. How would a gourmet experience of Omaha Steaks help them overcome those challenges? Our corporate gifts model may be as simple as rewarding employees during the holidays but also dives into more specific needs, such as employee retention, recruiting new talent, and rewarding remote employees in the post-Covid era.

With that mindset, our business team has the tools to curate a gift or promotion to meet those needs. I constantly hear the word “experience” as the essential need to move the needle in recognition. And from the moment you receive your gift to the time you celebrate that meal with family and friends, it is the “ultimate culinary experience” in your own home. I am proud to say that over 3,500 businesses have chosen to deliver that experience since 2020 alone.

To put it plainly, the confidence I have in sending my colleagues a business gift from Omaha Steaks is the same confidence I want our business partners to have in choosing us as their premier corporate gift option for their employees and clients.

How did you become involved in corporate gifts?

Corporate Gifting was a natural next step for us. We started as a food service company, selling to hotels, restaurants, and cruise lines—all of which we still do. As our direct-to-consumer business started to take off over 40 years ago, we began looking at customer feedback and why they bought. Our customers were



looking for our memorable experiential products to send to their employees and clients, not just for themselves and family. And since our drop shipment business model was already set up and equipped to accommodate programs like this, we dedicated resources to building our corporate department. The team has seen immense success and continues to grow.

What everyone loves about Omaha Steaks is the number of times you get excited about the steaks: when you get notified of the gift, when the cooler arrives, each time you open your freezer, planning the date of your delicious meal, and the meal itself. That creates multiple touchpoints and moments of appreciation for the company that gave you the gift.

Describe how you work directly with CEOs.

We value and appreciate each of our partners, especially CEOs who have come to us looking to reward and recognize people in their organizations. Most CEOs appreciate how customizable our program is, particularly our custom gift certificate that allows recipients to curate their own experience. I've talked to several CEOs about the talent challenges every industry has been facing lately and how companies are looking for new and tailored ways to show their teams how valuable they are.

From there, our experienced business team works directly with our client's executive teams to craft the gifting experience to meet their needs. One client even

offered a Food Bank donation as part of their Omaha Steaks employee gift options. Employees could either choose to receive the cooler, which the vast majority did, or gift it to the food bank. I was proud to join them at a ceremony to give some products to the local food bank. The positive feedback from company executives makes me proud to have our name as the premier business gift choice today.

“One client even offered a Food Bank donation as part of their Omaha Steaks employee gift options.”

Being able to relate to other CEOs is a real plus as we design custom programs. For example, as a consumer of various business services, I understand that all businesses have unique cycles that drive their success. By helping fellow CEOs tap into their business cycles with rewards, gifts, and recognition, they can maximize the value and effect of their program. Accounting firms have tax season, and many firms have quarterly celebrations. Some businesses run on calendar or fiscal year breaks. Understanding these cycles allows us to serve our customers better.

While clearly your corporate gifts business is year-round, the holiday season is an important part of your business. What insights can you share?

Over the past 30 years, we've constantly flexed upwards at the holidays, so we understand how to be a seasonal business. And lately, we've been viewing our business really through two lenses. One is our day-to-day, self-purchase, year-round business. The other is our holiday gift business, which has emerged as its own opportunity regarding specific customer needs over the last three or four years. While our corporate business is year-round, it, too, scales upward tremendously for the holiday. And this allows our team to be able to handle any size custom order for our clients, including those with over 20,000 employees! Our ability to build inventory,

scale marketing, and mobilize customer service and distribution staff to accommodate this volume truly makes our company thrive. This ability to flex during the holiday is one of the main reasons we were able to move and react successfully during the pandemic. In March 2020, business went from our self-buyer business to our holiday volume in a matter of weeks, all of which we handled in a very tough environment with labor issues and supply chain challenges—all the same things we're still seeing now. It still feels so fresh in our team's mind, and that experience has enabled us to be even more confident in managing robust holiday seasons.

Leaning into consumer data has also helped us. We continue to glean consumer insights from Harris Poll surveys we've commissioned to understand our customers' behaviors and preferences and identify trends around key time periods like Father's Day and winter holidays. Researching and understanding the marketplace (and not just reading the headlines) is invaluable. One of the things we've learned through our research this year is that people are excited to be together again, with larger gatherings and celebrations at home on the rise. That's a very good trend for us.

Describe your go-to-market thinking, from past to present to future.

Omaha Steaks started as a family butcher operation, moved to a wholesale butcher operation, and then evolved into the food service business. We knew that we would get disintermediated in the meat industry, so we consolidated in the 1960s and focused on being a consumer-first business in a really big way. Shortly after that, we moved into corporate gifting.

Today, we still have our legacy food service business. We sell through distributors, directly to some restaurants, and at some stadiums and other places around the country. We have 46 retail stores across North America, and we still do things the old-fashioned way, like taking orders over the phone and sending direct mail and catalogs. We also have a

robust digital presence with our website and social channels. As an omnichannel retailer, we want to be wherever our customers are. As we were pioneers of in-home delivery and have perfected the model of delivering high-quality foods and corporate gifts people can enjoy together, our plan is to build on our strong foundation and loyal customer base to continue creating joy-filled dining experiences. Through constant innovation and adaption to meet our customers' needs and a commitment to providing the highest quality products and stress-free experience, we continue to perfect the in-home culinary experience our customers and gift recipients expect.



Omaha Steaks began as Table Supply Meat Co.

Omaha Steaks was really the pioneer of food delivery back in the 1950s. How do you integrate current trends into your growth?

One of the things I reflect on is that, for our business, and maybe other CEOs should think about this too, trends are often evolutions and not revolutions. It's always incumbent upon us to look below the headlines and media hype and research to really understand what's going on in the marketplace. Some of the trends you mention have been beneficial for us short-term, which is the desire for higher protein diets, the shift away from carbohydrates, and individuals recognizing more nutritional benefits of beef and other proteins, which have all been good for us. But one of the things we know is that Americans' beef consumption hasn't changed that much over the last couple of decades. It may have gone up a few pounds or down a few pounds, but overall, people continue to appreciate beef and meat in their diet.

We have also seen our product line expand into other protein categories, including seafood, poultry, pork, and even veggie burgers, so no matter what, we'll have something delicious for everyone.

One of the most significant trends that has helped our business has been the boom in food delivery, and we've been in that business since the mid-1950s. We were the original food tech company, and now everybody has seen the benefits of home delivery. Many big box retailers have gotten into it, and we've seen that the rising tide has lifted all boats and increased the overall market share for home-delivered food, and that's taken our business up along with it.

As a 100-year-old family business, is there any one CEO you personally learn from?

For me, the CEOs that have a vision and look into the future. Interestingly, you can only understand that particular CEO in the future, though; you can't understand them fully right now. Steve Jobs, for example, was able to see and build the future through products. He transformed our lives, of course, but when he was doing it 25 years ago, we didn't know how transformative that would be. It's that kind of vision that I look for, and the challenge is to figure out who I should be following today and who has that insight into the eye of the future.

What are your thoughts on reputation from both a CEO and corporate standpoint?

That's a great question. Many years ago, we went through a planning process, and the front page of our planning document said, "do the right thing." Just four words, which really permeate the culture of our business. We always want to act with honor. We want to do right by our customers, suppliers, and employee team, whom we consider part of the family. I like to say Omaha Steaks is an overnight success that took 100 years, and after building a brand, brick-by-brick, over five generations has allowed us to nurture that integrity and make it central to our culture.



Todd Simon is the fifth-generation family owner of Omaha Steaks, where he serves as Chairman and Chief Executive Officer, and is the company's Chief Steak Evangelist. Todd has been with the company for more than 38 years after graduating from the Wharton School at the University of Pennsylvania. He began his career developing and implementing Omaha Steaks award-winning marketing programs, as well as the employee development efforts that drive the company's culture of excellence. As CEO, he leads the executive team and is responsible for providing strategic, financial, and operational leadership for the family business. Todd continues the Simon family's legacy of philanthropy and dedication to the community by serving on the Board of Directors for various arts organizations, as well as social and human services. He was the recipient of the Humanities Nebraska Sower Award, named Outstanding Volunteer Fundraiser of the Year by the Nebraska Chapter of the Association of Fundraising Professionals, and along with his wife, Betiana, was named Humanitarian of the Year by Inclusive Communities.





Leading through a value of communication: three fundamentals to meet the expectations of today's audiences

“Communication is at the heart of all great relationships.” Professor and CEO Dr. Rory McGloin shares his knowledge on how CEOs can leverage the value of communication to lead in the contemporary workplace.

By: Rory McGloin, Ph.D.
CEO, RPM Communication Consulting

Today's CEOs are provided an unlimited array of communication channels to connect with their stakeholders. Innovations in telecommunications have not only changed how we work, but have also had a profound influence on how we engage our most meaningful relationships. Therefore, it is critical for leaders to appreciate how new expectations are influencing their impact throughout their organization.

Thanks to the perception of perpetual linkage (a concept that implies individuals are consistently available to access all forms of communication channels), we have come to expect that leaders can communicate with their audiences at all times. And, while the long-term consequences of today's new

norms may take decades to unravel, there is no doubt that they have significantly altered our expectations of the communication responsibilities for a CEO.

If just thinking about the gravity of these new responsibilities has you feeling overwhelmed, just know that you are not alone. I've been studying communication for two decades and I founded RPM Communication Consulting with one mission: to help leaders communicate in the most effective and efficient manner possible. Over the years we've curated a set of fundamental beliefs that leaders can apply to ensure their communications are meeting the needs of their most cherished constituencies. Here are three of our favorites:

Treat communication like a value—not just a skill.

We've conducted hundreds of executive leadership training sessions and often begin by asking a simple question: What do you value? The answers are what you might expect: time, health, relationships... however, an answer we have never heard is communication. It's provocative to us and yet completely understood. In the corporate world, communication has been regarded as a soft skill. In fact, most executives that seek our services, begin with a narrow need, such as improving a presentation. Like most individuals, they want to use communication like a tool, no different than selecting the right wrench to tighten a bolt. The problem with this approach is simple, if we only see communication as a tool, we overlook the fact that it is directly impacting every facet of our lives. When we value our health, we think critically about the food we eat. When we value our families, we make efforts to create meaningful moments. Communication (and our ability to do so effectively) is connected to each of these core values and yet not typically regarded a value. So what?! We communicate every second of our lives, even when we are not actively sending messages, we're still communicating (e.g., saying nothing is still saying something). Therefore, if we treat communication like a value, we can gain so much more from every interaction.

Be authentic.

Authenticity has become quite the executive buzz word over the last few years, and for good reason. There are essentially zero barriers between CEOs and stakeholders. As a result, CEOs have felt compelled, even pressured, to share more. Pressure creates diamonds, however, sharing just for the sake of sharing is a trend we do not endorse as it has the potential to create false expectations and attract the wrong audiences.

Did you notice how many podcasts were started during the Covid lockdowns? We can attribute this

to our human nature and desire to feel connected. However, the trend was short lived for many as the process became a burden and provided more frustration than fodder, likely because it wasn't authentic to their personal brand. Instead, sharing from an authentic place starts with a clear understanding of why you feel compelled to communicate in the first place and then identifying the channel(s) that best suit your strengths. In other words, fight the urge to do what everyone else is doing. Be authentic to your style first and you'll attract real followers that believe in your vision.

Set and share clear expectations.

Humans have an innate need to reduce uncertainty. Uncertainty is undesirable and serves as a distraction. To be an effective communicator we must reduce uncertainty by providing clear expectations for our exchanges. In the world of digital meetings this becomes even more critical as we create new norms for these virtual spaces. We have learned that audiences are more engaged when they know what their role is. Therefore, before your next meeting, take the time to share your expectations with your audience. Don't be afraid that you're being too overt, instead, remind yourself that you're helping them perform at their best. By reducing their uncertainty you're reducing their distractions, and your communication will be more rewarding for everyone.



Rory McGloin, Ph.D. is an award-winning business communication professor at the University of Connecticut. Rory's career in higher education spans 16+ years, including engagements with over 10,000 learners to date and 34 peer-reviewed publications. Rory is also the founder and CEO for RPM Communication Consulting, a full-service communication firm that provides a range of executive training and development programs for contemporary business leaders seeking to develop their professional communication skills.



Pursuing growth, relevance & competitiveness

Aditi Javeri Gokhale—Chief Strategy Officer, President of Retail Investments, and Head of Institutional Investments at Northwestern Mutual—talks about setting a vision and taking on the toughest challenges while keeping a compassionate approach with the reality of day-to-day life.

Interviewed February 18, 2022

Robert Reiss: Talk about the Northwestern Mutual model.

Aditi Javeri Gokhale: When you look at Northwestern Mutual, it is truly unique at its core. And why do I say that? As a mutual company, we're not traded on the stock exchange, and we don't have shareholders. That means we don't answer to Wall Street, and everything we do is for the benefit of our clients and policyowners. We exist to serve them. Our mission is to help them build financial security by consistently delivering the highest possible value to our clients, taking a long-term view, and offering durable products with longtime horizons. Our clients stay with us for decades, so our business goals have to align with their lifelong financial goals.

When you think about our purpose, we're a company focused on delivering financial security for all our clients and policyowners. This is really what drew me to Northwestern Mutual because my personal value system was so deeply connected to the mission and vision of the company—freeing Americans from financial anxiety.

Speaking of unique, let's jump into your background and role today: corporate, entrepreneurs, operations, digital, marketing, strategy...

My role at Northwestern Mutual is President of Retail Investments and Head of Institutional Investments, along with Chief Strategy Officer. I lead teams that oversee more than \$540 billion in company and client assets, including over \$325 billion in our institutional investment portfolio and \$215 billion in retail client assets. Our retail investments business is one of the largest and fastest-growing independent broker-dealers in America, and our institutional investments team is consistently delivering benchmark-beating value to clients, helping Northwestern Mutual deliver exceptional financial strength and historic dividend payouts to our participating policyowners.

Another one of my teams oversees what we call Northwestern Mutual Future Ventures—a \$200 million venture capital fund focused on investing in early-stage companies seeking to bolster financial security. I get to talk to hundreds of these companies on a day-to-day basis, making sure their ideas and foundations are solid as we determine whether or not to invest in or partner with their business. Part of it is also sharing strategic advice on how they can scale and grow—perspective that comes from my years of experience working for Fortune 100s.

Before joining the company in 2016, I served as Chief Marketing Officer of LearnVest, a wholly-owned subsidiary of Northwestern Mutual, and shortly after, I was named Northwestern Mutual's first-ever CMO. Prior to that, I held executive roles at Nutrisystem, Travelocity, American Express, and Shutterstock with responsibilities including brand building, client acquisition, digital platform development, data and analytics, and P&L results.

During my career journey, I also joined fellow executives from American Express to launch iQuanti—a global digital marketing and data analytics company which now has over 200 employees.



The CEO Forum Group has selected Aditi Javeri Gokhale of Northwestern Mutual for the

Transformative CEO Award in Leadership in the category of Leading with Humanity. This is bestowed for codifying a new concept of leadership built on bringing one's true self to work through true transparency, open communication and unique respect for individuality and life.

“What I have told women and what I have told myself throughout my career is that there’s no point in losing sleep over challenges. You’ve got to be steady, you’ve got to be persistent, you’ve got to show grit, and you’ve got to take one opportunity at a time.”

Ultimately, as a result of these experiences, I know what it takes to ensure growth, relevance and competitiveness at both legacy and startup companies, and that experience is something I bring to the table in my role at Northwestern Mutual.

Share a challenge you had and what you learned.

I’ve had to challenge and push myself to stay outside of my comfort zone. That’s the best way for anyone to grow. In the business world, that’s meant that, sometimes, I am often the only one sitting at the table who looks like me.

I’ve had challenges where I’ve been passed over for promotions, and I’ve had challenges where I haven’t been considered for roles. But I’ve always felt that I had the right to compete for them.

What I have told women and what I have told myself throughout my career is that there’s no point in losing sleep over challenges. You’ve got to be steady, you’ve got to be persistent, you’ve got to show grit, and you’ve got to take one opportunity at a time. To grow, I’ve always recommended taking on challenges that no one else is willing to. And as I look back at my career, I’ve sought assignments that others have shied away from—assignments that have helped me stand out and ascend.

I’ve also underlined the importance of measurable and meaningful progress and success. We have to be able to articulate a bold, creative, and inspiring vision and demonstrate that we’re delivering results.

What do you see as the core essentials of leadership?



It all starts with setting a bold vision. You want to establish strong targets, while getting buy-in from your team. And when I say team, it's not just the people who you manage: it's the people in your cross-functional environment, and it's collaborating with your peers. At Northwestern Mutual, we are not siloed. Every single project and every single initiative is cross-functional.

The next thing you want to focus on is setting targets and benchmarks to demonstrate that you're moving the needle. And throughout that journey, you also want to celebrate both the big and the small wins, as well as applaud the calculated risks that employees take—even if those employees fall short.

Additionally, prioritizing trust is paramount. As a leader, you have to build that trust by leading with humanity, which means bringing your whole self to work and creating an environment where everyone else can do the same. And that is especially true when it comes to what we've gone through during the pandemic. In my case, this means being open and honest, talking about the challenges that I personally have as a woman and person of color who is continually balancing and multi-tasking. And it really comes down to having candid conversations with your employees; that's what builds trustworthiness.

I love this concept of leading with humanity. What's an example of how you do this personally?

Being open and honest and creating that same environment for others is important to me. For example, I frequently talk about my 14-year-old and his tennis games, whether he's got a science project, whether I've got to go for a doctor's appointment, and other priorities. I'm very open about them. Part

“At Northwestern Mutual, we are not siloed. Every single project and every single initiative is cross-functional.”



of leading with humanity means that people know what's going on in my life. I'm not hiding behind anything. All of us have to find a balance and we have to be real about it.

How do you really operationalize leading with humanity?

Leading with humanity became even more important for me while we all were struggling with the pandemic. The lack of day-to-day interactions, hallway conversations, and in-person meetings were starting to take a toll on me and my teams. One of the things I quickly instituted was “Ask Aditi”—a monthly Zoom session across my entire function where I sit down with a cup of coffee and open the floor. Anyone can ask me questions—whether business-related or personal. This was so effective that engagement scores within my function reached the highest in the company. And today, in our hybrid environment, we've leaned into this even more, connecting with our teams in-person and virtually.

The bottom line is this: we're prioritizing connectedness. Whether we're virtual, hybrid, or in an in-person environment, we have to manage, to coach, to connect the dots, and take accountability for each team member's success. We have to be intentional, and in this hybrid era, we have to build more opportunities for interaction and understanding. Town hall meetings are still



important, but to me, it's essential to go farther to build trust and relationships through smaller meetings, skip level conversations, and more.

What is your philosophy on balancing your life as a leader?

My personal philosophy is this: balance is a state of mind. Balance is not about working nine to five, and then not working at all. And it's not about scheduling and coordinating. Of course, the assembly line for any working mom has to function, but you have to ask yourself, "What are my sources of happiness?"

My sources of happiness are three things. First, I want to work at a company that empowers me to do my job and bring my authentic self to work. And that's what I have at Northwestern Mutual—it is truly connected to my personal values. Second is being able to spend quality, not quantity, time with family and friends. I'm able to spend quality time with my son, and that's essential to me. And third is being able to really enjoy life's journey. If I'm able to do these three things, I have good balance.

Let's take your balance philosophy and expand it into the culture. What are the secrets to selecting great talent and maintaining it, especially when building this culture in a talent war?

At the end of the day, we all know that there's a

talent war. When I have looked at the talent who have succeeded at Northwestern Mutual, it's those who truly embody our exceptional culture. We take pride in building an engaging and inspiring culture, which we've had for over 165 years. Of course, we all need to deliver on goals and results, but to me, the people who grow the fastest are those who believe deeply in our company, mission, and vision. One of the things that I'm personally passionate about and proud of is being the executive sponsor for our women's platform. I want to make sure Northwestern Mutual is the best company for women to join, to stay, and to grow.

When I think about talent, especially women and what they're going through right now post-pandemic, we want to ensure they're in a culture where they can be themselves, where they feel empowered, where they have the right job opportunities, and where they have a voice to change the culture.

Top talent also looks for a diversity of experiences within their job. We encourage our rising stars to take on new roles so they don't have to stay in one function. For example, I started in marketing, then I headed to corporate strategy. Now, I'm overseeing retail and institutional investments. We encourage our talent to move and gain those experiences.

It's exactly like your previous advice of taking on more assignments.

I'm a big believer of being a bit uncomfortable at all times, because that's how you learn and that's how you grow. And when I mentor women, I tell them, don't think about title, think about expanded experience. I do a lot of formal and informal mentoring, and I'm always a big proponent of pushing yourself when it comes to growing. It's not about promoting, going from an assistant director to a director. It's about getting those experiences. That's what's most important, and what will count in the future.

With women in particular, there's a lot of research showing that they have a lack of confidence. There

“I’m a big believer of being a bit uncomfortable at all times, because that’s how you learn and that’s how you grow. And when I mentor women, I tell them, don’t think about title, think about expanded experience.”

is a fear of judgment, and so one thing I have to tell them is that you’ve got to talk yourself into situations. When I’m speaking with women they often say, “Well, I don’t think I should take this job. I don’t think I should be taking on this project.” They tend to talk themselves out of situations, and I’m always telling them to do the opposite. I want them to say “I can do this. I can, I can. I may not succeed, but that’s okay. I will learn through that.”

And when you talk about talking people into something, you were just 17 years old, with only \$150 in your pocket, and somehow you talked yourself into getting on an international flight, coming to MIT. Describe what you learned from there.

For me, it starts with being born and raised in Mumbai in a very close knit, middle class family where I got a lot of support and encouragement from my parents, my sister, and from my extended family. So I think that foundation was really strong. They truly encouraged me to take risks. That was what led me to apply to MIT. I got in, I had \$150 in my pocket. My extended family, in fact, financed my one-way ticket, my food and clothing. I put it all into two large suitcases and I took my first international flight to Boston’s Logan Airport.

I’m proud of my journey and where I started from and still live by what my dad told me years ago and is still relevant today, “Reach for the sky and reach for the stars, but be humble.”



Aditi Javeri Gokhale is the Chief Strategy Officer, President of Retail Investments, and Head of Institutional Investments at Northwestern Mutual. She holds executive accountabilities for the company’s strategy to drive growth, competitiveness, and relevance. She leads teams that oversee more than \$540 billion in company and client assets.

She is accountable for NM Future Ventures along with digital disruptor, Wyshbox. Aditi has led the retail investments business to record growth, making it one of the fastest growing independent broker dealers in the country. Aditi is also a key voice in driving the company’s culture. She serves as executive sponsor of Northwestern Mutual’s African American employee resource group, and is also the executive sponsor of the company’s Women’s Initiative.

Aditi received her MBA in management from the Sloan School of Management at the Massachusetts Institute of Technology (MIT). She also received her Bachelor of Science degree from MIT, majoring in management science and minoring in economics.





PICTURED LEFT TO RIGHT: Robert Reiss, CEO, The CEO Forum Group; Meera Krishnamurthy, Global Insurance Leader, Cognizant; Dan Amos, Chairman & CEO, Aflac; Caroline Feeney, CEO, U.S. Insurance & Retirement Businesses, Prudential; Andrew McMahon, President & CEO, Guardian Life

Does your insurer really care about you?

I asked America's top insurance leaders.

By: Robert Reiss

Four visionary insurance leaders recently told me that the industry's future is to be "as fast as Google, as far-reaching as Facebook, and [most importantly] as intimate with its customers as Amazon."

While insurance is the financial backbone of the economy, the industry is still perceived as transactional and slow to change. However, what consumers really want is to be understood as individuals, have deeper connections, longer relationships, genuine caring, and true empathy.

Dan Amos, the chairman and CEO of Aflac, Caroline Feeney, the CEO of U.S. insurance and retirement businesses at Prudential, Meera Krishnamurthy, the global insurance leader at Cognizant, and Andrew McMahon, the president and CEO of Guardian

Life envision a future where Silicon Valley-level technologies that are "behind the curtain" enable genuine human connection.

The biggest risk for the insurance business

At the heart of insurance, there is the concept of risk. Dan Amos, who is in his 33rd year as Aflac CEO, is one of the longest-serving CEOs in the Fortune 200.

He sums it up in a simple yet profound way: "The three principles I use to evaluate risk are: don't risk a lot for a little; don't risk more than you can afford to lose and then consider the odds. I use these principles consistently to evaluate risk."

Insurers are rethinking risk through an emerging technology lens. Meera Krishnamurthy explained

the opportunity: “A.I.-driven algorithms and machine learning are already advancing the industry’s understanding of risk, but we’ve only scratched the surface, as the industry has enormous data issues to address.”

Krishnamurthy also highlighted another type of risk that insurers need to address. Cognizant’s survey of 2,100 retail insurance consumers revealed that 69% said they are either unclear about whether their insurer cares about them, or they don’t believe that their insurer cares about them. That emotional disconnect has profound implications for customer retention and trust.

Caroline Feeney outlined a key dynamic, “I believe if you marry the high-tech and the high-touch together, you ultimately will have far better outcomes for our customers. We’ve set a number of aspirations at the company level. And one of them is to move from being customer-focused to being customer-obsessed—and that’s a completely different game.”

“Insurance is a technology business,” Andrew McMahon agreed. He explained how the insurance industry can learn from Silicon Valley about adopting important technologies to advance all elements of the customer experience and operations.

Andrew McMahon shared his leadership philosophy on driving a world-class customer model, “I’m an alum of two storied management academies—McKinsey and General Electric—where I learned the virtues of analysis and the need to be decisive and action-oriented. Those things continue to be important, but today’s leaders also need to influence and inspire, establish a vision of where we’re going, and create a safe environment to take calculated risks and innovate.”

Elevating customer connections

When asked about the secret to truly connecting with customers, McMahon explained that “listening is the first step to creating ‘wow moments.’” Guardian Life created a listening program for employees to

hear firsthand what policyholders experience and to empower them to come up with solutions to enhance those moments.

Cognizant’s Meera Krishnamurthy noted that while certain technologies can help drive the delivery of great customer experience at scale, “having the right data is the precursor for effective service delivery.”

“Most companies can’t scale by relying on human service heroes, so you need to get really good at pulling together data from internal and external sources. Success with data will set up success in delivering the convenience, speed, and insights that modern customers expect,” she added.

Dan Amos emphasized that great customer models start with culture, “I still think we’re a people business. We don’t sell a tangible product. I think it’s always going to be a people business to some degree and you have to know it, but you also have to know technology.” And Amos reinforced what comes first, stating, “So goes the employee, so goes your company.”

For Caroline Feeney, empathy is at the heart of great leadership in today’s insurance industry. “I was once told by a well-intentioned leader to lose my empathy gene so I could make tough decisions more easily,” she said. “Fortunately, I didn’t follow that advice, and I now know that empathy actually makes me a more effective and stronger leader. If you can put yourself in somebody else’s shoes and understand how they’re feeling, you are in a better position to have those important conversations.”

Having personally interviewed over a thousand top CEOs over the last 15 years and speaking with CEOs every day, I can confirm that empathy is quickly emerging as one of the most important leadership traits—and that it will shape the future of insurance. This customer obsession, when coupled with technology and data, has the potential to elevate the entire industry.

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Promoting health equity and human dignity

Bob Garrett—CEO of Hackensack Meridian Health—shares his thoughts on what makes a great leader and how Hackensack is making fighting human trafficking a priority.

Interviewed December 12, 2022

Robert Reiss: Describe Hackensack Meridian Health (HMH) and what makes it a unique healthcare leader.

Bob Garrett: Hackensack Meridian Health has grown to New Jersey's largest health network with 18 hospitals, more than 500 patient care locations, 36,000 team members, and 7,000 physicians.

Hackensack Meridian is unique in several ways. First, the network is highly integrated with a full continuum of care that provides every level of treatment as well as preventive services to address all needs of our patients and the communities we are privileged to serve. This is the key to providing seamless care, improving outcomes, and creating a better patient experience. Without integration, we would simply be a confederation of hospitals.

We have made major strides that truly differentiate the network in behavioral health, medical education, and research. Even before the pandemic, we saw a need to expand access, better coordinate care, and integrate behavioral health care fully into the network—including in primary care settings.



The CEO Forum Group has selected Robert C. Garrett, CEO, Hackensack Meridian

Health, for the Transformative CEO Award in Leadership in the category of Fighting Human Trafficking. This is bestowed for his extraordinary vision and initiative in bringing the healthcare industry center stage to lead the path to ultimately eradicate human trafficking.

To really transform healthcare, in addition to a high-quality and high-performing clinical network, we needed to change how we teach future doctors and accelerate the pace of bench-to-bed discoveries. This is why we opened the Hackensack Meridian School of Medicine and the Center for Discovery and Innovation on the same campus in northern New Jersey in 2019.

In short, innovation is in our DNA. It is at the heart of our strategic priorities. In a post-pandemic world, innovation has never been more important.

Here are a few great examples: there is an urgent need to increase access to high-quality care because one in four Americans does not have a primary care physician. We are working diligently to keep people healthier and to deliver more value. We opened a new ambulatory care center this year and plan to open four more throughout the state over the next few years.

Our innovative patient access center is another game changer because it leverages all modern technology to help people make seamless connections for their healthcare. Since we started, primary care appointments increased 15 percent, and by the end of this year, we expect to handle 1.5 million calls.

I am so proud that we never stopped innovating, even as we treated more than 85,000 COVID patients throughout the pandemic. In October, we opened the nation's first "smart hospital"—a nine-story state-of-the-art surgical tower at our flagship academic medical center. As one of the largest hospital construction projects in the nation, it includes an intraoperative MRI, all private rooms and the capability to convert entirely to a negative pressure system. We implemented design changes during construction to incorporate the lessons we learned during the pandemic. Talk about innovative!

What has been your strategy to have such dramatic growth?

Our growth has been highly strategic and remarkable. We don't just grow for the sake of getting bigger; we are focused on improving care, enhancing the patient experience, and making care more convenient and affordable. We are deeply committed to creating the health system of the future, and the hallmark of this is high-quality, convenient, and accessible care.

"We are focused on improving care, enhancing the patient experience, and making care more convenient and affordable."

As we developed the network, we have continued to live our mission which is to transform healthcare and be the leader of positive change. Growth isn't simply about acquiring hospitals or opening new facilities. We needed to grow in additional ways by expanding research capabilities, transforming medical education, and ensuring that all communities in New Jersey have access to high-quality, convenient, and affordable care.

The Hackensack Meridian School of Medicine is the first private medical school to open in 60 years. This innovative curriculum focuses on the



social determinants of health and is creating a new generation of doctors who will thrive in a world that focuses as much on prevention as curing illness. To help patients achieve optimal health, our future doctors understand the non-medical issues that greatly impact health, like food and housing insecurity. We also created a three-year path to residency which helps us build a robust pipeline of needed physicians faster. More than half of our graduates are serving their residencies in our network.

We also opened the Center for Discovery and Innovation (CDI) to accelerate the pace of bench-to-bedside discoveries. In short, our patients' unmet medical needs are driving our science in real time. The CDI contributed major breakthroughs during the pandemic, including developing the first commercial test a week after we admitted the first patient in March 2020. We recently secured a record \$108 million NIH grant to develop oral therapies for the virus and future threats.

Our partnership with Carrier Clinic is transforming behavioral healthcare in New Jersey and beyond. One in four Americans struggles with a mental health or addiction problem, and the pandemic has exacerbated illness, especially among children. Through the partnership, the network opened one of the first behavioral health urgent care centers in the nation, and nearly two years ago, it opened a state-of-the-art addiction treatment center. More expansion

is included. Forty pediatric beds will open at Carrier's main campus within the next two years.

We also continue to grow through partnerships with other high-quality providers. Here's a great example. Through our partnership with St. Joseph's Health, we are expanding access to high-quality oncology care, which includes opening a new outpatient center, providing more specialists, and upgrading facilities and technology in a new market for Hackensack Meridian. Additionally, we have expanded state-of-the-art rehabilitation care with St. Joseph's in the same market.

What are some of the specifics of your leadership philosophy?

I am not just the CEO of Hackensack Meridian Health; I am the Chief Mission Officer, too. This isn't a job. It's a way of life. I remember when we received the first COVID patient in New Jersey at the beginning of the pandemic, and I felt a pit in my stomach, an overwhelming responsibility not only for the pending tsunami of patients, but for the 36,000 team members as we entered truly uncharted waters. More than ever, I realized how important it was for me to be the Chief Mission Officer, to remain calm and level-headed and focused on our priorities.

"I am not just the CEO of Hackensack Meridian Health; I am the Chief Mission Officer, too. This isn't a job, it's a way of life."

This brings me to another important aspect of being CEO—communication is so important. During the pandemic, we released two updates daily for the entire organization. There was confusion, changing guidelines, and a lot of misinformation from a variety of sources. We also held several virtual town halls and had key physicians available to answer questions for team members. To this day, we continue regular

COVID updates for our teams and our boards. We became the trusted source of truthful information.

I also believe that the best leaders are good listeners. There's a great quote that has stayed with me for many years: "Leaders who don't listen will eventually be surrounded by people who have nothing to say." Our teams are encouraged to speak up. In fact, I joke with some of our most outspoken leaders and say, "Here comes the Jersey Straight Talk."

You have taken a strong stand on fighting human trafficking. Why does the healthcare industry need to be at the epicenter of this crisis?

There is no question that fighting human trafficking aligns with the healthcare mission. In fact, at Hackensack Meridian Health, it is included in one of our seven strategic priorities—promote health equity and human dignity to improve the health of our communities.

Here's the bottom line: about 9 in 10 victims seek medical attention at some time during their exploitation. Almost 70 percent have gone through an emergency department. And sadly, most victims have several encounters with providers before they report abuse.

We can be the vital link that helps save lives. At Hackensack Meridian, we are moving well beyond training our teams to identify and aid victims. We are mandating training beginning in 2023 for all students at the Hackensack Meridian School of Medicine to learn to identify and aid victims of human trafficking. They will also be taught as they round in emergency departments during their training. Additionally, we are including screening for human trafficking in our network-wide social determinants of health strategy. To date, we have screened 535,000 patients for non-medical issues that greatly impact health, i.e. food and housing insecurity, transportation issues, etc. All the information goes directly into the patient's electronic medical record and through a

“Fighting human trafficking aligns with the healthcare mission. In fact, at Hackensack Meridian Health, it is included in one of our seven strategic priorities—promote health equity and human dignity to improve the health of our communities.”

digital platform, which automatically connects with social service agencies. To date, we have provided 1.5 million referrals.

I was honored to represent Hackensack Meridian Health at a UN panel in September to fight human trafficking. I joined several global experts in helping draft a protocol for medical providers to better identify and aid victims, which we asked the World Health Organization to adopt. We will continue to do our part to help as many victims as possible, and I will continue to encourage more leaders in our industry to join the fight.

What do CEOs who are not in healthcare need to understand about healthcare in America today?

This is the most challenging time in our industry. Radical change is underway, driven by unprecedented consumer demands, regulatory changes, and a post-pandemic era that has exposed great fault lines in the nation's public health system.

The industry remains one of the most fragmented sectors in the economy, which leads to higher costs, poorer outcomes, and less patient satisfaction. That's why when we created Hackensack Meridian Health, we were committed to having a fully integrated network to ensure the full continuum of care for better outcomes, greater patient satisfaction, and ultimately more value.

Additionally, innovative partnerships are also an excellent way to reduce duplication, leverage strengths, and create synergies that improve access, quality, and the consumer experience.

What is your vision for healthcare in America and globally?

HMH is a clear role model for integration and collaboration and the value that can be delivered in any community. Through partnerships with providers, employers, community agencies, and payers, we align our goals for improving the health of our communities. This is the transformation that's needed in the current fragmented state of healthcare.

Improving health equity is also a major goal for the nation and the global community. Look, this is one of the greatest failures of the American health system. Imagine a world where your zip code is not an indicator of your health! The COVID pandemic revealed the terrible fault lines in outcomes based on race and ethnicity. Black Americans have been twice as likely to die as white Americans in the pandemic.

More providers are understanding that up to 80 percent of a person's health is determined by non-medical issues such as food and housing insecurity, addiction, or transportation issues. Translation: we need to pay a lot more attention to what's *not* in a medical record to tackle the tsunami of preventable chronic illness and premature death, especially in communities of color.



The good news? This approach is front-burner and is driving new strategic priorities at all major health systems, creating unprecedented alignment between providers and payers and transforming curricula at medical schools.

We will continue to invest in strategies to deliver more health equity because you can't transform health care without making sure everyone has access to high-quality care.

What is your vision for Hackensack Meridian Health and the role it will play in the global health continuum?

Transforming the global health continuum starts with medical education and training and educating the next generation of physicians. This is why we created and launched the Hackensack Meridian School of Medicine.

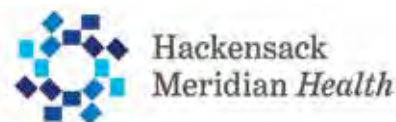
To improve medicine, you have to start at the beginning and reinvent medical education. The heart of the curriculum is the human dimension program, which pairs students with people in underserved communities for the duration of their education.

They have taught people how to lose weight so they require less medication. They have helped people stop smoking and they understand that there is so much more to a patient than what's in a medical chart.

Collectively, they will improve on our shortcomings as an industry: inadequate primary care; not enough focus on prevention and maintaining health; unequal access to care; limited options for mental health and addiction treatment and so on. They will move healthcare from acute episodic care to an integrated and coordinated system focused on prevention and better care management. In short, they will humanize healthcare, a goal the entire global healthcare community shares. And Hackensack Meridian Health is poised to lead the way.



Robert C. Garrett is the CEO of Hackensack Meridian Health, New Jersey's largest health network with 18 hospitals, 36,000 team members, 7,000 physicians and the Hackensack Meridian School of Medicine. Under Mr. Garrett's visionary leadership, the network has made major strides in medical education, behavioral healthcare, cancer care and innovation and research.





The most kind-hearted leader of our time

A tribute to Frances Hesselbein—leading at 107 years old.

By: Robert Reiss

CREDITS
TOP: THERESA BERENATO; MIDDLE & BOTTOM: GIRL SCOUTS OF AMERICA

My dear friend, Frances Hesselbein, was the oldest living active CEO at 107 years old. I spent so many thoughtful discussions with her. Frances told me time and again her motto, “To serve is to live.” I introduced my daughter, Molly, to Frances as an example of what a great leader really is. Alas, on December 11, 2022 she passed away.

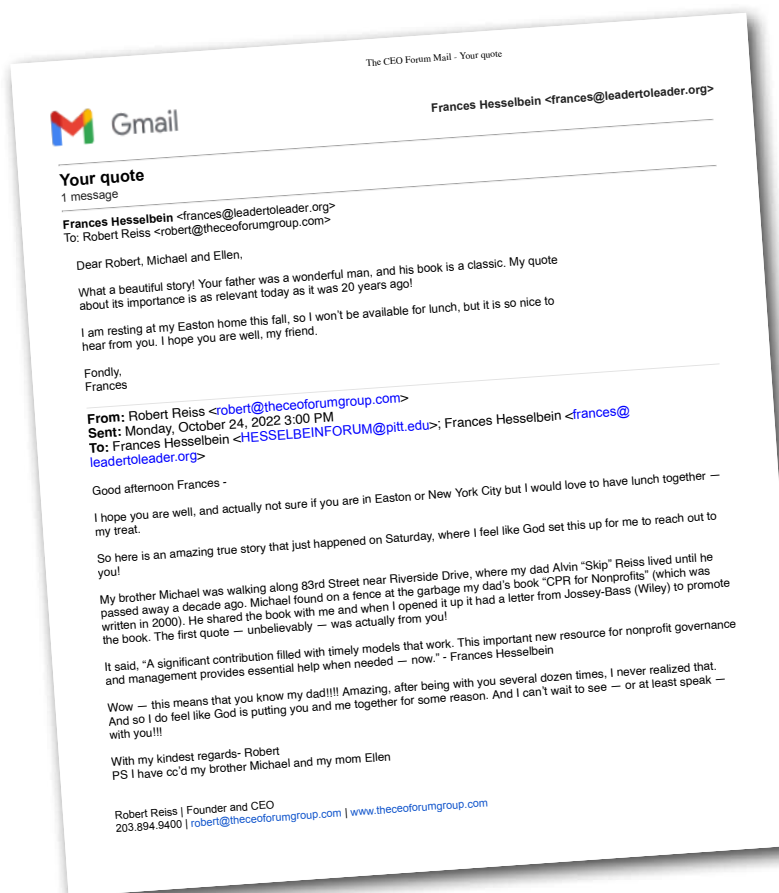
Here are three quick memories:

One day at her office, we were having lunch brought up and as we finished, she gave me a big grin and said, “I brought you a surprise: ice cream.” And there was a little cup of vanilla Haagen-Daz. It reminded me of what my daughter did at five years old; and I believe how Frances retained that joy of a child is why she stayed so young at heart.

Another memory was during April 2020 when I called Frances and asked her how she was managing during this emerging pandemic. She responded, “Well, I was very young during the 1918 pandemic,

Frances was an esteemed retired member of the Board of Directors who was part of the Mutual of America family for more than 40 years. She lived life guided by her motto ‘to serve is to live,’ and her legendary knowledge about leadership, together with her passion for caring, giving back and making a meaningful difference, helped make Mutual of America the company it is today. Those of us at Mutual of America who are privileged to have known Frances benefited tremendously because each moment spent with her was an invaluable learning experience. We will gratefully remember her kindness, integrity and commitment to service.”

John R. Greed
CHAIRMAN, PRESIDENT & CEO
 Mutual of America Financial Group



so this is much more real to me.” When I asked about her biggest challenge, she said, “I always had my hair done on Mondays, and I miss that.” It was clear two things were missing—human contact and always wanting to look one’s best.

One of my favorite of the 350 articles I’ve written for Forbes is about Frances that I wrote back in 2013. You can read it here: (<https://www.forbes.com/sites/roberttreiss/2013/09/30/americas-greatest-leader-shares-her-wisdom-on-leadership-women-millennials-and-civility/?sh=3d4ba6431474>)

Finally, above was my last correspondence with Frances via email, which I feel is appropriate to share to illustrate how crisp her thinking was (but of course she was only 106 and 11 months when she responded!).



The opportunities created by COVID-19

By: Robert J. Sullivan

CEO RJS Consulting, LLC, CEO of Satuit Capital Management, LLC & Chairman of Satuit

COVID-19 has challenged patient care in the healthcare sector, especially those areas with more direct, specialty care patient attributes. Managers of these practices continue to face multiple challenges including safety, adequate staffing, and accessibility to telemedicine. Patient centric areas in the healthcare sector like Rheumatology, Infusion, and clinical trials require unique patient interactions that result in unique treatment decisions, however these challenges have created opportunities for financial and practice growth.

Two of the more unique growth strategies are a roll-up model or joining a network of affiliated practices. The result is a larger, integrated firm or network passing along all the traditional benefits ascribed to a larger firm. Benefits include sharing best business practices, innovative practice performance technology, access to capital, and operational and purchasing efficiencies to drive margin expansion and profitability. For the founder of the smaller practice who desires to monetize years of practice growth while providing a financial growth opportunity for those doctors new to the practice, the roll-up model offers an effective monetization strategy. Both the roll-up model and network models have the ability to evaluate and engage with vertical specialty practices groups that may be complementary to the core vertical.

Finally, opportunities identified and benefits produced through roll-ups and networks are only as good as cultural attributes embedded in the organization. No cultural attribute is more important than communication. A culture of communication begins in the CEO's office, extends into the Board room and throughout the organization. For either the roll-up or a network model to be successful, qualitative and quantitative measures of financial and operational performance (KPI's and metrics) must be effectively developed and communicated, bottom-up and top-down, throughout the organization.



Robert J. Sullivan is founder, CEO and CIO of several investment companies and is currently CEO of RJS Consulting, LLC. He has over 20 years of institutional asset management experience.

With a specific investment management expertise in U.S. emerging companies and turnaround opportunities in the healthcare sector, Mr. Sullivan's focus has been the identification, financial analysis and capital allocation into all industry segments of the sector.

Mr. Sullivan possesses a demonstrated public track record of investment management and research, business analysis and development, capital formation, and a proven ability to develop and direct teams in risk management, operations, controls, and product sales.



Building a workforce on wisdom

Chairman and President of Perelson
Weiner LLP, Ron Weiner discusses how
he builds a unique culture with 50 years
of leadership under his belt.

Interviewed December 22, 2022

Robert Reiss: Describe Perelson Weiner's model. It's different than many other accounting firms I've seen.

Ron Weiner: We are quite different than any other CPA firm that I know of, and it goes back to 1997 after we had formed the firm as a result of a merger between Sam Perelson's firm and my firm, and we merged in 1994.

By 1997, we saw the beginnings of what has become an ongoing process of the commoditization of professional services by CPA firms, but also in other professional service firms throughout.

We made a decision then with our partners that we did not want to be a commodity, we wanted to be in the knowledge business. Our eight partners decided that the way to do it was to interact with our clients to a greater degree than is the norm. And each of our partners committed to providing not less than 1,500 hours of client service to our clients.

It was really unanticipated what would happen because of that. But because our partners are deeply involved with our clients, we proceeded to attract even more successful people who were seeking to be able to get good advice from people who knew what they were talking about through experience.

"We made a decision then with our partners that we did not want to be a commodity, we wanted to be in the knowledge business."

That process has continued to today. And with that, came a structure that is much more like a smaller consulting firm, in that we have a two to one staff to

partner ratio, as opposed to firms that are trying to be 10 to 25 to one. If you're 10 to 25 to one, the role of a partner is largely to drive adherence to firm policies with significant siloing of their areas of professional knowledge.

We, on the other hand, believe in a much more holistic approach. And we have a two to one staff to partner ratio, which enables us and our partners to interact with clients who are seeking people who know what they're talking about, as opposed to just speaking to somebody at a much younger age, who is really reporting to their CFO, or their CEO. So we represent entrepreneurs, the businesses they own, high net worth families, as well as non-U.S. entities doing business in the United States, which includes one of the sovereign wealth funds out of the Middle East. So it's an evolution and it's ongoing.

What's interesting is you have been able to build the culture shaped on that philosophy.

Well, I had a wonderful learning experience going way back in the late 1970s, and I've been running



The CEO Forum Group has selected Ronald G. Weiner, Chairman and President, Perelson

Weiner LLP, for the Transformative CEO Award in Leadership in the category of Accounting. This is bestowed for a new type of accounting firm utilizing a knowledge business model, including a two to one staff to partner ratio where partners focus on 1,500 hours a year of serving clients; also many unique leadership practices include a wisdom-driven culture, uncovering choices for the most discerning clients and only hiring people who are smart, hard-working and nice.

firms for 50 years. In the late 1970s, I took a program at Harvard Business School which was a nine week program spread into three three-week periods.

I had a professor who I became close with by the name of Renato Tagiuri, now long deceased. And he told me something because I was having a very stressful relationship, and I wanted to address it and resolve it constructively. He said most people are who they are by the time they're 40. In addition, he said, "You have three choices in human relationships: you can either leave it as it is, you can terminate it or you can try to figure out how to optimize a person's strengths and contain their weaknesses."

It caused me to change my management style and substance to trying to help people optimize their strengths and finding ways to contain their weaknesses because none of us are perfect.

"A smart person can solve problems for themselves and those around them, while a wise person would have never gotten into in the first place. We are in the business of helping our clients and ourselves gain wisdom."

And with that, and with the merger, that created Perelson Weiner. We now have a firm of eight equity partners who have been together over 30 years on average and we have 12 non-equity partners who have been together somewhere around 15 to 20 years on average. We have a very low turnover rate with our staff; we have some pretty strict criteria for what we want when we hire someone.

On culture, what's the secret of having really smart people who will not always agree with each other?

Well, I don't want to pretend that there's a secret sauce. But, over time, we have refined who we are, and what our values are. And the values my wife describes about this place is being like Noah's Ark as we have two of everything. I think that's pretty apt.

"The commitment to learning is neverending."

But on the other hand, we have common values, even though we're very different people, but our core values are very common. And we have a hiring criteria that I'm actually quite proud of which is, first and foremost, the people we seek to hire are smart. Along with that, they also have to have a strong work ethic. And then thirdly, and no less importantly, they have to be nice.

When you take those three factors together—smart, strong work ethic, and nice—it creates a solid culture of opportunity, because we communicate more easily, because there's mutual respect. But it's also because smart people have the ability to continue learning. And going back to the prior segment of our discussion, they have the capacity to learn to become wise. And that's an ongoing life experience. So the commitment to learning is never ending.

You and I have spoken before about your leadership philosophy, and you've delineated between the word smart and wise.

You've given me the opportunity to say one of my very favorite expressions, and it is the definition of a difference between a smart person and a wise person. And the differential is that a smart person can solve problems for themselves and those around them, which a wise person would have never gotten into in the first place. We are in the business of helping our clients and ourselves gain wisdom.



That actually brings me to another quote that I like, if I may. And that is from the ever-famous Yogi Berra, who said, “If you see a fork in the road, take it.” And there’s a lot to be said for taking the fork in the road. But the difference between a successful entrepreneur and a less successful one is that when the successful one takes, as Yogi Berra says, the fork in the road... and if it’s a mistake, they correct it much faster.

You’ve been in a leadership role for actually 50 years, 28 years with your current firm, which is very rare, but you’re also on numerous boards. What’s a best practice in communication?

I had a very interesting life experience way back when I was on the AICPA’s management accounting practice committee and I was asked to give a seminar.

Then we had another speaker who followed me, and it was clear that he was losing the audience and he was getting very frustrated. So I was asked to speak to him about it and said, “You look very frustrated.” And he responded that he was.

When I asked why that was, he said, “Well, I’m saying exactly what I want to say. And they’re just not getting it.” And I said to him, “I think that you don’t quite understand that the purpose of speaking is not to say what you want to say, it’s to enable other people to hear what you want them to hear.” And that is a very different criteria.

“What I find all too often is that people focus on the path as opposed to focusing on the objective.”

So learning how and, by the way, this comes back to being involved in all these different organizations I’ve been involved in, the responsibility is to speak responsibly, in a way that enables people to hear what you want them to hear. And that doesn’t mean not speaking to the issue. In fact, you have a responsibility to speak to the issue, but you need to speak to it constructively.

How do you view the concept of giving advice, as that's something you're involved with every day with CEOs, entrepreneurs, philanthropists?

I think that the primary objective of giving advice is not to win the argument or to have an argument. It's to enable the recipient to better understand what their choices are. I think that our role first and foremost is to help clients understand choices because everybody is different and everybody has different values, and those values need to be respected. At the same time, it's critically important that when there is an issue, that we speak into what we believe to be the correct decision, not because the other party is necessarily wrong, but we just can't be an advice giver.

We have to be proactive, and we have to be able to see what the point of giving the advice is and then it's the client's choice to be able to accept, reject or consider. And we must help them bring it to a path that's consistent with their values and their objectives.

What I find all too often is that people focus on the path as opposed to focusing on the objective. And it's a much better way to operate—to focus, I think, on the objective, as opposed to being consumed by the path.

Talk about philanthropy which you've had as part of your personal and professional DNA for decades.

Well, where do I begin? It has been a privilege and, frankly, with the enormous benefit on my side of the table, it has brought me to interact with people that I never would have interacted with otherwise. I've learned about how they function and how I can communicate with them in a way that is constructive, even when we disagree. So I've drawn an enormous benefit from doing that.

And with that, if I could just rattle off a couple of things...I was very fortunate. I went to Babson College, and that was a very peculiar place when I

went there. I graduated at the age of 20 and then went to work for one of the big four accounting firms—it was back then a big eight—and then continued to evolve. I got involved in community activity because I found work in and of itself too constricting. And by being involved, it was important to me to be able to make a difference in one sense or another. Not to be in a leadership role, but just to do a good job, whatever I got involved in. And that's evolved over the decades, to my having been in a whole series of leadership positions.

And now I am a Trustee Emeritus of a number of significant organizations after having been president of some of them. Each one of these have brought me in contact with people I wouldn't have otherwise known. And it's really been a blessing.

“It has been a privilege and, frankly, with the enormous benefit on my side of the table, it has brought me to interact with people that I never would have interacted with beforehand.”

I would also say, going back to when I was young and I served in the military, I think that having served in the military was also a very positive experience because it brought me in contact with people I would have never otherwise met. The more I've been in contact with people, the more I've learned to value other people and their values. And I've also learned to recognize when our values don't fit. It's been a lifelong learning process where I've benefitted tremendously.

I've had the privilege of helping make a difference in other people's lives as well. So, in the end, what I can say is that I feel very strongly, no matter how much traveling I do, and I've been in close to 100 countries, it's ultimately all about people, and that's

where I draw my satisfaction and my interest. And, occasionally, it's where I draw my aggravation. However, it all goes together, and it's worth the price.

Final question. Tell me about the future and what might be in the cards.

Well, that's a very interesting question. I was always the youngest at everything I did. I mentioned before that I graduated college at 20, high school at 17. I was a management consultant at 22, and I had to lie about my age because he didn't want to tell a client that they were being advised what to do by a 22 year old! And, suddenly, I am now 77 and no longer the youngest at everything I do. But as long as I maintain my mental acuity, physical capability, and the quality of relationships that I'm privileged to have, I intend to keep on doing what I'm doing, which also involves continuing to meet a very broad range of people, as well as sustaining relationships with people who have meant a great deal to me. So life goes on. But it goes on, not because I'm being pushed through any door, but rather because I have doors that are open. And I like walking through them, which almost brings me back to my earlier quote about Yogi Berra.

“The more I've been in contact with people, the more I've learned to value other people and their values.”

It's been an interesting life, and it's very important to me to live an interesting life. Sometimes I sit in a meeting, and as I go around the table, people will ask, “What do you do for a living?” And every so often I decide to play with the words, and rather than saying that I'm a CPA, and some people think that essentially, as an accountant, it's like an actuary with no personality, I'll respond by saying I'm an eclection. And that's the way I try to live my life—with a lot of eclectic aspects.



***Ron Weiner** is chairman and president of Perelson Weiner LLP, Certified Public Accountants. The firm is dedicated to helping entrepreneurs, their families, and businesses—as well as assists international companies and their owners in their activities in the U.S. Ron's experience spans financial consulting in business, real estate, and acquisition and divestiture matters. He advises on special projects and personal planning. His financial background, broad domestic and international perspective and consultative skills are well attuned to the needs of boards of companies and their owners. He is an expert on management of professional service firms and entrepreneurial businesses. He also helps resolve complex litigation matters. His business knowledge and ability to create tax advantaged structures have been of particular value in estate and tax planning, dispute resolutions, mergers and acquisitions. He has been a director of Nautica, Inc. and Market Basket.*

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Prioritizing people in order to drive change

United Way Worldwide President and CEO Angela F. Williams shares her perspectives on the organization's purpose, standing up for humanity, and their work in Ukraine.

President & CEO, United Way Worldwide

Interviewed June 14, 2022

Robert Reiss: Angela is the President and CEO of United Way Worldwide. Let's start with the basics. What is United Way?

Angela F. Williams: United Way is a one-of-a-kind network with more than 1,100 local United Ways operating in 37 countries and territories with 45,000 corporate partners, and more. We are your neighbors; our staff are on the ground as trusted partners, ensuring that we are working in collaboration with all sectors to solve critical problems that are in communities.

What's unique certainly is the Global Local, which everyone talks about now. Can you elaborate on how that concept works?

Let's go back to the five founders, four of whom were theologians, and one woman. They started this organization 135 years ago in Denver, Colorado, because of the need that they saw in the community. They called it the Community Chest. That was the original name. They got businesses or individuals to pour into this community chest as a resource to then reach out and meet needs. Now, we find ourselves in 2022, still in the midst of a pandemic with so many other factors affecting us. This notion of a community chest where we can pour in but then also take out to meet the needs of our neighbors is really important. That makes us, as a legacy organization, still relevant.

What's the current United Way identity in today's work?

I've been on the job for just seven months. In my short time, we have continued to experience a strong need around the world. We have local United Ways on the ground and at the border, welcoming refugees from Ukraine in Germany, Poland, Hungary, and Romania. The United Way Worldwide network activated immediately to launch a Ukraine fund so that companies and individuals could give to support

“People, organizations, governments, and political leaders come to United Way when something happens because they know that we are a trusted adviser in the community.”

the work on the ground for the people of Ukraine. I'm excited about that because it just shows the flexibility, breadth, and depth of who United Way is—and that we are there in times of need and it doesn't take time for us to respond. Another example in the United States is after the mass shooting in Uvalde, Texas. We had a local United Way in San Antonio set up a fund to help the families that were affected by the mass shooting. Those are just two examples of who United Way is, and we are really neighbors.

How do you decide where to prioritize your focus?

United Way has three areas of focus: health, education, and economic mobility. And the through line for all three of those areas of focus is equity. How do we focus? People, organizations, governments, and political leaders come to United Way when something happens because they know that we are a trusted adviser in the community. We know all of the



The CEO Forum Group has selected Angela F. Williams, President and CEO of United Way

Worldwide, for the Transformative CEO Award in Leadership in the category of Non-Profit. This honor is bestowed for Williams' global leadership in driving the local global model seamlessly, which has elevated in importance during the challenges of the 2022 world.

Angela F. Williams

key players, we partner, and we collaborate. And so they come to us for assistance.

Let me give you a real example with the pandemic. As many people recall, there were issues where people couldn't go to work because their place of employment was closed, and that meant they didn't have funding they needed and were in jeopardy of losing housing. The federal government in the United States passed funding to provide rental assistance. When that money trickled down from the federal government to the local governments, the local governments were not necessarily equipped or ready to handle the calls or to identify the people in need for the rental assistance funding.

Across the United States, the United Way was the go-to partner. We also have a system called 211, where



people can dial 2-1-1 from their phones to reach an operator to help them with any social service needs. We had the uptake of people calling us, we had local government saying we need to disperse funds, we need to vet who needs those funds, and we need to connect the dots. That's where United Way came in; we have a system and an infrastructure that is set up to serve.

Let's go into your relationships with corporations

and how they partner with you. What is your message to CEOs about being involved in United Way?

It's actually fascinating that it's a two-way conversation. As the new CEO of United Way Worldwide, I have been intentional and reaching out to meet some of our 45,000 corporate partners, their CEOs, and their CSR and ESG teams. I have been asking the questions, "How can United Way be an even better partner to them? How are we aligning with what they would like to do, the work that we do, and how we show up in the community? How could we forge a stronger partnership and work together to solve community problems?"

In asking those questions, the response that I'm getting is tremendous. They love United Way, they see the important work that we all do on the ground, and we all are great partners.

I'll tell you one story. I won't name the CEO, but it was a Fortune 500 company CEO that I met with within the last month. He said to me, "Angela, I'm a member of the U.S. Business Roundtable. And we CEOs get together in the room, we talk about how we are addressing the needs of the communities in which we operate. We decide that we'll work on a project jointly together, and one of the CEOs will offer up a staff member to be the project manager. But, it doesn't seem like we're able to move the project forward to completion." And he said, "You know what, I need you, representing United Way, to be in the room with us. Because you all are the perfect partner, you know how to do the work. So when we CEOs come together and think about community, you should be in the room to say, 'All right, we can take the ball, and with your support, we can run with it.'"

That is a great story of the Business Roundtable and true partnerships. I'm always saying that CEOs have a role and a responsibility to build a better world.

That's right, and we are so thankful for the over

45,000 corporate partners we work with around the world. What's really wonderful is that our local United Way's steward the relationships with these partners on the ground in their communities.

What we saw during the pandemic was the human heart and true human nature really coming forth. Even though we were in periods of isolation we also saw little kids, as well as adults, wanting to make a difference and to help people in their community that, for example, didn't have food or were in need of transportation or other needs for assistance. But we have volunteer engagement managers in our local United Ways that work with our partners to create opportunities for service. We also have a day of service that we offer as well. And so that's a wonderful way for people to say "I'm taking a day off from work, and I'm going to give my talent and my time to help someone else."

Let's go into your background. Your dad was an Air Force Chaplain, you are an Air Force Veteran, and your parents were also deeply involved with civil rights. Tell me about what you learned growing up.

I'm going to have to teach you because, if I let this go, I can't go home and see my parents. There is so much rivalry between the Marine Corps, the Navy, the Air Force, and the Army. I was an Air Force lawyer known as an Air Force Jag, and my dad was the fifth Black chaplain in the history of the United States Navy. While I was on active duty, and my dad was on active duty, my brother was on active duty as a Marine Corps officer.

So you can just imagine the conversations around the dinner table about which branch of service was the best. My mom would always whisper to me to go into the Air Force because they treat women better. So I am proud to be a veteran of the Air Force, but I'm also proud of my dad being in the Navy and my brother being in the Marine Corps.



Growing up in a military household did a couple of things for me. First, it made me, my brother, and my sister global citizens. Second, what it did was build in us that ethic of service. You can have that ethic, whether you're serving in corporate America, whether you're serving in government, or whether you're serving in the non-profit sector. I've worked in all of those sectors.

I am the child of parents that were active in the civil rights movement with my dad being pastor of a church in Anderson, South Carolina, and in the 1950s, writing letters to the pastors about, "We have to be brave, we have to stand up, we have to integrate our city." And my dad worked closely with Martin Luther King Jr. and that impressed upon me as a young child, this notion of justice and giving back and service. That's my upbringing.

In addition to being a lawyer, veteran, and CEO, you're actually an ordained minister, is that correct?



I accepted my calling into ministry just before I started working for Senator Ted Kennedy on the Senate Judiciary Committee. I had to go to him and say, “I’m going to start seminary, but I’ll do the weekend program. What do you think about that?” He was actually extremely supportive, and he came to my ordination. Every Monday the Senator would say, “What was the service? And what was the sermon?” So we just had a great time together, and he would also introduce me to people because I came to him from the Justice Department as an Assistant U.S. Attorney. And he would say, “This is Angela, she puts them in jail in the morning, and she prays for them at night.” I’m not putting them in jail anymore, I’m helping them out. But I’m still praying at night.

What is your advice to CEOs on activism?

I believe that we have to recognize that companies and businesses are organisms within themselves, but they’re comprised of human beings. And it is our employees, it is our board members, and it is our volunteers who live in the community, who go home at night and are affected by what is going on. Therefore, I believe that there is a role to play for leaders—CEOs—to be able to speak, to be a voice, and to be an advocate. We have to recognize that when people are hurt in a community by something

that’s happening they bring their whole selves and that hurt to work. There’s not a place anymore for us as leaders to remain silent. We have to address our staff, we have to acknowledge what is happening in the world and around us. And, we have to be able to speak words of leadership, comfort, encouragement, and even in some cases, activism.

“There’s not a place anymore for us as leaders to remain silent.”

How do you connect to the people you’re with in a company as a CEO?

In rising up in the leadership ranks to reach the point of CEO where I am now, I’ve learned that people want to see you as an authentic person. Sharing part of who I am, my story, what I may be going through at that moment with my staff, has helped me realize that I can relate to you. You may be going through the same thing, whether it’s an illness of a family member or sharing that I’m caring for my elderly parents, and some of the things that you have to go through as a caregiver. Being relevant, being approachable, and being authentic is important.

You've spoken about what United Way is doing with Ukraine. Please give us a little more insight into the work you're doing here.

Let me start by sharing the story and then the long-term effects that all of us are going to be feeling and have to address. When the war first started in Ukraine, what we saw on the news were families being separated, where the husband or the partner would stay behind to fight.

The women and children were crossing the border into safety, whether it was into Germany, or Poland, or Romania, or Hungary, and our staff was waiting there to welcome these families. It started with a warm cup of coffee or hot chocolate, and then some food. Then, they set up mobile playgrounds—because you can imagine the trauma of traveling to get away from bombs and then to get the kids to safety. So the kids would play, and our staff would pull the mothers to the side. And the moment the mothers were pulled to the side, they would break down and start crying and sobbing. They had to hold that in though during the trip because they didn't want to trouble their children. The reason I want to share that is because we have to recognize that what's happening now is going to have long-term mental health effects.

When we talk about education or legal documents or translation, and how do we set these families up for success, when they may or may not be able to go back home again, because they've left everything that they've known behind. We are working with other entities to provide legal support. We are working with others to help find out where these families want to go. Where do they want to stay?

I go back to the three pillars of United Way Worldwide, which revolve around health, education, and economic mobility. We are seeing all that on the ground right now, as we're working with Ukrainian refugees.



Angela F. Williams is President and CEO of United Way Worldwide, which serves more than 1,100 communities in 37 countries and territories around the world.

With more than 30 years of leadership experience in the nonprofit and corporate sectors, Williams brings a long history of purpose-driven work to her role at United Way Worldwide.

Williams previously served as president and CEO of Easterseals; general counsel, and chief administration officer at YMCA of the USA, and as U.S. Air Force Judge Advocate General's Corps (JAG).

Williams' vision for United Way Worldwide is to create equitable solutions in communities and ensure that people experiencing problems have a voice in solving them.





WBC, Our Drive as the Women's Business Movement to Build Equity: Looking Back and Forward

By: Edie Fraser | Founding CEO and Chair of WBC

Collaboration, Acceleration and Accountability are Women Business Collaborative's (WBC) cornerstones for achieving gender equity, DEI, and Equal Position, Pay, and Power for all women in business. As Helen Keller said, "Alone we can do so little; together we can do so much." There is pride in sharing a passion for change, and together, we make such a difference. Robert Frost set the tone, "The woods are lovely, dark and deep. But I have promises to keep and miles to go before I sleep." Change the "I" to "We," WBC has miles to go before we sleep and yet will not tarry along but speed up the timeframe to clear the pathway toward gender equity and DEI in business. Our pathway will be a highway with millions of travelers.

This article focuses on three related areas: sharing the building and future of WBC; leading the clarion call for transparent data and impact; and building and saluting purposeful leaders and companies of purpose.

Sharing and building the future of WBC: unprecedented collaboration as we accelerate gender equity & DEI results

Women Business Collaborative (WBC) is the unprecedented alliance of 76+ women's business organizations collaborating for equal position, pay, and power for all women in business. How proud we are to work together, committed to building the movement to drive the elevation of all women in business.

Thank you, Robert Reiss, for our four years together with WBC. You were with us in the beginning. You had the vision to drive more women CEOs and leaders, and you shared your push for equity and joined our call for action from the beginning. Your strong and compelling call—alongside ours—to CEOs and companies to demonstrate action and impact, purpose and leadership.

Thank you to our WBC Board and all our stakeholders. Thank you to my partner, Gwen K. Young, our next WBC CEO. We are proud of her succession to WBC CEO from her work as COO over the past two years. I will be steadfast in supporting

WBC in the role of Chair. We express our deep appreciation to thousands supporting us now and into the future!

WBC started with a question: What if? What if we built a collaboration of women's business organizations and with private sector corporations and CEOs together to drive change? What if we built a business women's movement to advance and accelerate business women as senior executives, successful entrepreneurs, board members, and as venture capitalists?

The challenge has been compelling. After only four years, WBC as a 501(c)(3) is more than a reality—it is making and reporting real progress. Women Business Collaborative (WBC) was created to connect and convene organizations and the private sector to leverage one another's strategic priorities and competencies toward the acceleration of gender equity and DEI results and the achievement of the full partnership with women and men. We're leaving no stone unturned.

Before WBC, women's business organizations and their stakeholders were working in silos, not in collaboration. Companies had neither committed to an integrated gender equity and DEI strategy nor to reporting data and accountability. We saw this as a genuine opportunity to build a movement together to drive true impact and change. As we say at WBC—we are truly #FasterTogether.

From spring 2019 to spring 2023, we are filled with not only hope but also the actual recognition and celebration that we are making progress.

We have so much further to go together. Our work is about collaboration and accountability. We work through Nine Action Initiatives as the framework through which we can drive true change and equity for women in business. Our work to aggregate and share data and best practices allows us to hold each other accountable and celebrate wins together.

Today, we feel a sense of pride and a renewed commitment to drive change. WBC is all about building sustainable relationships and networks with bold commitments to include others and galvanize together. Yes, RBG, we heard you: “Fight for the things that you care about, but do it in a way that will lead others to join you.” Our collective voices resonate. Our voices are loud and strong. A choir is made up of many voices, and together the orchestra builds a symphony. There is harmony. The whole is bigger than any one part. That is why we are, in fact, #FasterTogether.

With our board and organization partners, WBC is a movement and an accelerator of change with clear 2025 and 2030 targets for our Nine Action Initiatives. Before WBC, we saw too much fragmentation. Redundancy and competition happen everywhere; and one person or one organization cannot drive longterm changes. Only collaboration and action of committed leaders could change the trajectory. Our September Collaboration Report showcases our progress.

Nine Action Initiatives

- CEO Leadership and Sponsorship of Women CEOs
- Women in the C-Suite & Executive Leadership with P&L Responsibility
- Women in the Boardroom
- Women Entrepreneurs and Access to Capital
- Women in Capital and Finance
- Gender and Pay Parity
- Diversity, Equity, and Inclusion (DEI)
- Women in Technology
- Women in the Pipeline

Leading the clarion call for transparent data and impact: transparency accelerates gender equity & DEI

Since its inception in 2019, WBC has been reviewing gender equity and company DEI data. What if all organizations and corporations publicly reported their data and results? Transparent data is a

powerful accelerator of change because it encourages accountability, reinforces commitment, and empowers people to advocate for themselves and others. Transparency is particularly impactful for diversity, equity, and inclusion.

We celebrate when organizations and companies acknowledge goals and achievements by reporting data and stories and, thus, are transparent. We work collaboratively to publish the data and use social media each day to share the data. We are moving into our fourth year of the Women CEOs in America Report and will hold our annual Action for Impact Summit in September 2023. WBC, with data from Equilar, publishes a monthly report on Women Joining Public Boards. In 2022, WBC released our first Women in the Boardroom report, and the Women Corporate Tech Executives in America report provides an unprecedented analysis of women C-Suite leaders across companies and industries (CIOS, CISOS, data analytics, and more).

WBC works hard to amplify data results in our Nine Action Initiatives and analyzes DEI and ESG reporting in all we do. In January 2023, WBC, with Gender Fair and the University of New Haven, produced the first report tracking DEI data across companies—taking what is currently shown in DEI and ESG reports on their websites and combining it with publicly reported EEO1 data. Many reports are on the workforce, suppliers, or boards. We analyze the integrated and cross-sectional data reporting from the workforce to boards to suppliers and communities. This is what makes our work so important and beneficial to learning and adapting.

What do we learn from Best Practices?

Our key findings:

70%

of CEOs made a public commitment to DEI with 53% stating clear DEI goals.

76%

of companies track employee diversity but only 64% break out data by demographics and 49% by race or gender

35%

published a separate DEI Report.

84%

included DEI in their CSR or ESG/Sustainability report.

47%

published their EEO-1 reports.

29%

conduct pay equity assessments.

29%

track supplier diversity spend.

More CEOs and Boards of Directors are sharing transparent data. Organizations are sharing data on the workforce from C-Suite to boards and beyond and on supplier results to capital support and ESG in communities. It is clear that we need to track and celebrate models.

WBC is proud to work with Gender Fair and Equilar to track and analyze gender equity, DEI, and ESG data. The Business Roundtable is also a partner confirming our joint call to promote gender equity across the business community.

The transition to sharing data is significant. We acknowledge so many of our organizations sharing data. LATINASTyle, Seramount, and Catalyst. LATINA Style Inc., the premier company addressing the needs of Latina professionals and business owners in the U.S., announces the LATINA Style 50 Report for 2022 as it has been doing using transparent government and corporate data for more than a decade. The LATINA Style 50 Report is the most respected evaluation of corporate America's

career advancement opportunities for Latinas and sets the standard for identifying corporations that are providing the best career opportunities for Latinas. Women in the Workplace by McKinsey and LeanIn is the largest study on the state of women in corporate America.

For years, Diversity Best Practices (Seramount) and DiversityInc, and others have participated in collecting gender equity and DEI data. We cite Deloitte, EY, PwC, and others in our reports, as well as McKinsey, LeanIn.org, and Diligent. WBC is proud to salute Bloomberg and the Gender Equality Index, Fortune, Forbes, and others for collecting data. We salute companies like IBM, Just Capital and others tracking ESG and other data. We thank the CEO Forum, which works with WBC, for covering these stories.

In 2015, LeanIn.Org and McKinsey & Company launched the study to give companies insights and tools to advance gender diversity in the workplace. Between 2015 and 2022, over 810 companies participated in the study, and more than 400,000 people were surveyed on their workplace experiences. In 2022, 333 participating organizations employing more than 12 million people, surveyed more than 40,000 employees, and conducted interviews with women of diverse identities, including women of color, LGBTQ+ women, and women with disabilities.

We salute the NYSE and Nasdaq, for their roles in promoting gender equity, DEI and ESGs. Further, government data use with SEC on Corporate and Venture firms is growing. Corporate Government contractors have been sharing their data. The EEO-1 Component 1 report is a mandatory annual data collection that requires all private sector employers with 100 or more employees, and federal contractors with 50 or more employees meeting certain criteria, to submit demographic workforce data, including data by race/ethnicity, sex and job categories. (EEOC).



The Catalyst statement released December 1, 2022 stated the belief that transparently publicizing DEI metrics and initiatives makes good business sense: “We believe disclosure of diversity, equity, and inclusion metrics and goals illustrates a deep strategic commitment to a fair environment and should be a universal corporate practice. Corporate stakeholders, such as employees, investors, shareholders, and customers, increasingly expect companies to promote DEI as key corporate values. They are asking companies to be more transparent and are holding them accountable for progress.”

Building and saluting companies of purpose and purposeful leaders

The WBC Companies of Purpose program aims to bring together leaders and innovators in purpose who are driving impact through DEI and gender equity. The focus is the “S” in ESG against the integrated programs related to staffing, brand, and community.

We aim to scale innovation, share best practices and show how each company can alone and collectively build out diverse leadership to drive corporate impact and purpose and thus link gender equity and DEI to corporate purpose. We salute Entrepreneurs with Purpose as well and praise WBENC and others working to consider certification for suppliers with ESG and DEI Purpose.

WBC is proud to salute and support companies whose CEOs and officers lead with purpose.

ESG now includes gender and diversity, as well as sustainability and more. ESG means the inclusion of all talent, more gender and diverse suppliers, deep commitment and contributions to communities, and an impact on companies’ brands. The best places to work include gender and diversity in ESG.

We are coming up on the third anniversary of the Business Roundtable’s announcement in 2019 about redefining the purpose of a corporation to promote an economy that serves all Americans. The revised statement declared that companies would move beyond the shareholder primacy model and lead their businesses to the benefit of all stakeholders—workers, customers, communities, suppliers, the environment, and shareholders. specific stakeholder performance of BRT signatory companies in JUST Capital’s annual Rankings of America’s Most JUST Companies (2022) to explore how these companies are following through on their commitments.

BRT signatories stacked up in our Rankings distribution over the last three years, to better understand trends in their performance. JUST Capital’s 2023 report of 2022 Rankings presenting a scoreboard of the top 100 after a sample of 3,002 companies came out January 10, 2023. In 2021, 188 signatories were ranked; and in 2020, 181 signatories.

WBC is working with 42 companies and aiming to move more than 75 Companies—including large corporations, entrepreneurs, and even a few business schools on our Companies of Purpose Initiative. Nine of those companies are in the JUST Capital 2022 “Most Just Companies.”

The WBC Vision for Corporate Purpose:

- More purposeful leaders.
- More companies of purpose have committed CEOs and teams, with CEOs being chief purpose officers. Purpose is tied to leadership.
- More chief purpose officers and others with the responsibility to integrate DEI and purpose.

- More annual reports of DEI and ESG data of support.
- More accountability as firms such as WBC partners, Gender Fair and others rate companies for boards, talent, brands and ESG.
- More entrepreneurs and even a certification for supplier diversity.
- More dollars committed to purpose.
- More media coverage of purposeful companies such as Fortune, Forbes and Wall Street Journal.
- Most on business schools teaching purpose with accountability, as well as graduates and workforces demanding purpose.

CEOs express passion about having a positive societal impact and serving all stakeholders; Companies of Purpose know that gender equity and DEI are critical.

IBM CEO Arvind Krishna put it: “Purpose and profit go together, reinforcing each other.” PayPal CEO Dan Schulman said, “I’d actually argue if you don’t have a purpose as a company, you will be less successful from a results perspective.”

And Pfizer’s CEO, Albert Bourla also said, “If you stay true to your purpose...there is a compass, there is a star that is telling you this is where we all go.” McKinsey research found that frontline employees who “feel purpose” at work are up to four times as engaged as those at organizations where purpose is not activated and aligned to that of individual employees, and twice as likely to stay in the job.

The products of the companies show the brands’ commitment to putting people first and a focus on all stakeholders and purposeful work and support. Cisco’s CEO Chuck Robbins has gone to great lengths to incorporate compassion into their leadership philosophy. WBC is adamant that purposeful leadership is focused on diversity, the “S” in ESG, and works with companies to drive change and share best practices.



Edie Fraser is CEO of Women Business Collaborative (WBC), the unprecedented alliance of 76+ women’s business organizations and hundreds of business leaders building a movement to achieve Equal Position, Pay, and Power for All Women in Business. Fraser spent 14 years as Managing Director of Diversified Search and founder and CEO of STEMconnector and Million Women Mentors (MWM). Fraser built three companies and several movements. She received 65 major leadership awards, has been inducted into the Enterprising Women Hall of Fame, and received the Mosaic Award from Diversity Woman. She sits on several boards and was Chair of the World Affairs Council of D.C. and is a founding board member of C200. Fraser was founder and CEO of Public Affairs Group working with 250 Fortune companies, advancing best practice programs on women and diversity leadership. The company included Diversity Best Practices (DBP), the Business Women’s Network (BWN) and Best Practices in Corporate Communications.





How a Leader Pivoted to Help the Environment and Society

Interview with Brittany Perkins Castillo | CEO of AshBritt Inc.

Robert Reiss: Today AshBritt is the largest emergency management logistics company in America. Describe your model.

Brittany Castillo: AshBritt is a partner to communities that have experienced disaster and crisis events. These include natural disasters like hurricanes, tornadoes, wildfires, and floods. In the last two years, we have been a partner to the federal government as one of the two team members responding to FEMA's National Vaccination Project and to 22 states as part of COVID response. Increasingly, the unfortunate reality is Emergency Management is a growing sector due to factors like the opioid crisis in this country, the crisis of housing and homelessness, and humanitarian responses in our country and overseas. Our company is a partner to communities and to governments in times of crisis events.

One high profile and significant project you worked on was the California fires.

In 2017, as many people will remember, we had Hurricanes Harvey, Maria, and Irma followed by the Northern California wildfires in Sonoma Lake County, Napa, and Mendocino Counties. Those wildfires were the most destructive fires at that point in California history. I'd been CEO just under two years at that time. I went out to California because the Army Corps of Engineers activated the federal disaster response and environmental services contract, and our company was called to manage the recovery. So, it was a really interesting time.

Our teams were working across 67 different cities and counties, and I left those operations to manage this federal contract in California. The contract ended up being over \$300 million, and we had over 400 people employed on that response. What I'm really proud of is that our activations are always responsive to the needs of the community. In that part of Northern California, it was critical to have union team members and local workforce, and we were able to achieve over

79% of local union labor force. That's a core value of our company. The economic recovery of a community needs to happen alongside the physical recovery. It's one of our core values that we are able to maintain no matter where we're working in the country or the globe.

“The economic recovery of a community needs to happen alongside the physical recovery.”

Then, you pivoted and changed your company and purpose.

After that, our leadership team got together to analyze our strategic vision. We said what we do really well is manage emergency and crisis events—primarily government partners and private sector—and are experts in emergency logistics or experts in government contracting and understanding operations anywhere on a truncated time period. We had been a longtime partner building congregate shelters, temporary infrastructure, bringing in food, ice, water, fuel, and temporary power. When the pandemic happened, most people might not realize that it initially was an emergency management response.

“When the pandemic happened, most people might not realize that it initially was an emergency management response.”

We got our start in Massachusetts under our state contract for emergency logistics, and we started building field hospitals. We were able to move rapidly thanks to the leaders at our team and our people across the country. We were building full turnkey field hospitals. I'm talking building of the hospital, getting the city and county permits, FDA licenses for medicine, bringing in nurses and doctors, and turnkey managing these facilities in under six days. It's tremendous. There were lots of empty Toys“R”Us,

Lord & Taylor, and Garner Worlds in the Mid-Atlantic Region. We were able to go in lease from these empty facilities, bring in local labor—many who may have worked with these facilities before they were shut down—and turn them into places of hope in communities for vaccines and testing efforts.

We have over 6,800 people working across 22 states in 2021 up through today, and we actually still have some active operations with monoclonal antibody infusion treatment sites. I'm proud of that work. AshBritt now is really known as an expert in emergency logistics and emergency management, in addition to being the best in the country at debris removal and environmental services after crisis events.

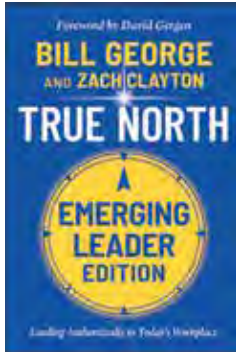
Finally, I know you have focused deeply with advancing women in business.

I'm really proud to say we've been intentional about women in leadership across our company, and we've also doubled the size of women on our management team during that period. As CEO, I'm proud to announce that, in about six years, we've tripled the size of our company.



Brittany Perkins Castillo is Chief Executive Officer at AshBritt Family of Companies—AshBritt, Inc., AshBritt Management and Logistics, and AshBritt Infrastructure. She has led AshBritt's operations following disaster events including hurricanes, wildfires, the COVID-19 pandemic, and various humanitarian crises. Brittany is a former prosecutor, managed an Austin law practice, and was a program manager in Doha, Qatar. Brittany is known for supporting the need for DEI and women mentorship in operations and emergency management fields. She recently launched WTFem.org, a repository for resources to help advance women the emergency management. Brittany is Vice Chair of the Pace Center for Girls Board of Trustees, a member of the board of directors of the AshBritt Foundation and 4Girls Foundation, and serves on the Business Advisory Council for Dress for Success Palm Beaches.

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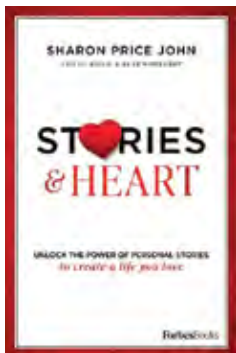


True North

By: Bill George and Zach Clayton

Leading authentically in today's workplace

True North is a clarion call to emerging leaders to step up to lead our organizations with their hearts, not just their heads, as authentic leaders who lead with purpose by inspiring and coaching their teammates. It heralds the end of the Baby Boomer era of Jack Welch, when too many leaders focused on maximizing shareholder value, taking shortcuts rather than building sustainable enterprises serving all their stakeholders. Our best hope for a better world is to empower the next generation of emerging leaders—not just those on top—to follow their True North to make this world better for everyone. Stories from 220 interviews with exceptional leaders illustrate that most authentic leaders first discovered their True North through their life stories and crucibles, developed self-awareness, and then found their North Star – the purpose of their leadership.



Stories & Heart: Unlock the Power of Personal Stories to Create A Life You Love

By: Sharon Price John (Build-A-Bear Workshop)

The power to create a life you love is within you.

This is a core belief of Build-A-Bear CEO Sharon Price John that makes *Stories & Heart* stand out among today's business books. Revealed through events and experiences that shaped her life, Sharon assembles a blueprint for making meaning in modern times. More than candid stories that educate and inspire, she guides readers through her framework for using their own personal stories to enact meaningful change in their lives. Each chapter begins with a themed story highlighting a life lesson—like learning to set productive goals, or challenging limiting perceptions—then proceeds to a “Questions from the Heart” section that creates a place for contemplation. The chapters conclude with a “Create Your Own Story” exercise designed to help readers identify the power of their personal stories, impact their own journeys, and create a life they love.

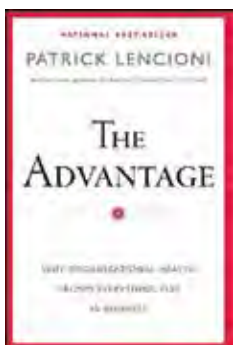


Take Command

By: Joe Hart and Michael Crom (Dale Carnegie & Associates)

A modern manual for personal development

Take Command offers powerful tools and time-tested methods to help you live an intentional life by transforming how you approach your thoughts, emotions, relationships, and future. Filled with stories of everyday people and based on expert research and interviews with more than a hundred high-performing leaders, this book provides the strategies you need to unlock your full potential and create the life you want. Take command of your future with this groundbreaking book from the experts who brought you *How to Win Friends and Influence People*.



The Advantage

By: Patrick Lencioni

Establishing healthy, unified organizations

The Advantage argues that the seminal difference between successful companies and mediocre ones depends on how healthy they are. Lencioni brings together his vast experience in a cohesive and comprehensive exploration of the unique advantage organizational health provides. An organization is healthy when it is whole, consistent and complete, when its management, operations and culture are unified. Healthy organizations outperform their counterparts, are free of politics and confusion and provide an environment where star performers never want to leave. The Advantage provides a foundational construct for conducting business in a new way—one that maximizes human potential and aligns the organization around a common set of principles.

LET'S MAKE A PLAN TO TURN SOMEDAY INTO TODAY.

GET STARTED WITH ONE OF OUR FINANCIAL ADVISORS AT [NM.COM](https://nm.com).



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A black and white portrait of Byron Allen, Chairman and CEO of Allen Media Group, looking upwards with a thoughtful expression. The image is dark and serves as the background for the top half of the page.

“I believe we
can achieve Dr.
Martin Luther
King Jr.’s dream
of One America.”

Byron Allen

CHAIRMAN AND CEO

Allen Media Group



Allen Media Group is celebrating its 30th anniversary as a global media, content, and technology company that delivers a 360° experience to over 200 million consumers and business partners. Its goal is to entertain, inform, and connect with audiences through its multiple platforms.