

The CEO Forum

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INNOVATION
**Hackensack
Meridian Health**
ROBERT C. GARRETT
CEO



AMERICAN INDUSTRIAL POWER
USA Rare Earth
BARBARA HUMPTON
CEO



OPERATIONAL EXCELLENCE
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Services, Inc.**
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Sharon Price John
PRESIDENT & CEO, BUILD-A-BEAR WORKSHOP 2013-2026
SPECIAL BUSINESS RECOGNITION: EXPERIENTIAL RETAIL

BONUS FEATURE
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CENTERED
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BY

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I am so pleased to share with you our annual issue of “The Top 10 Businesses in America 2026.” This is based on our criteria of a company that “reinvents its industry or reboots society.” Some are familiar, and others will be soon.



These companies are not about short-term wins; they are led by CEOs with long-term vision, courage in decision-making, and the ability to see around corners. These CEOs have challenged legacy thinking, embraced innovation, and built organizations that are more resilient, more relevant, and more human-centered. You will see it in these leaders who understand that transformation is not just about business—it is about people and purpose.

When I co-authored *The Transformative CEO* (McGraw-Hill 2012), a major premise was that great companies often witness breakthrough ideas from other industries and then uncover how to use those concepts to elevate their own industry. My hope is that you—along with our 10,000 CEO readers—learn from these 10 remarkable case studies and help reinvent your own enterprise ... and who knows, maybe next year you'll make our “Top 10 Businesses in America 2027” publication!

A handwritten signature in blue ink, appearing to read 'RR', located below the main text block.



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Frederic Laluyaux

Co-Founder, President & CEO

The CEO Forum

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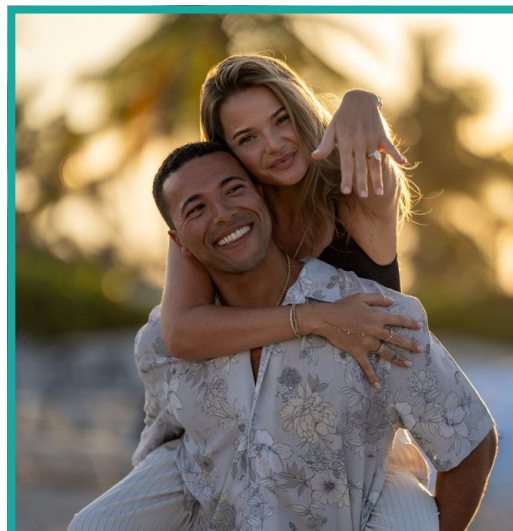
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CEO, Build-A-Bear Workshop
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THE CEO FORUM GROUP TEAM HIGHLIGHT

Emily Dardis

CREATIVE DIRECTOR
The CEO Forum Group congratulates Creative Director Emily Dardis and her fiancé, Isaac Lowell, on their engagement. Isaac proposed in Delray Beach, Florida in November 2025.



Redefining the patient journey and community health

CEO Robert “Bob” C. Garrett shares how Hackensack Meridian Health proves that innovation isn’t just about technology—it’s about culture, prevention, and meeting patients where they are. From AI-powered diagnostics to transit hub healthcare services, the organization is rewriting the rules of large-scale healthcare delivery.

Interviewed on February 25, 2026

Robert Reiss: Hackensack Meridian Health is now more than a \$10 billion enterprise with 38,000 team members and 18 hospitals. How do you define innovation at that level of scale?

Robert “Bob” C. Garrett: Innovation is in our DNA. We succeed because our approach transcends the mere adoption of new technologies. It requires a strategic and holistic approach that fosters a culture of continuous improvement throughout the entire health network. At this scale, we see innovation as an intentional and consistent strategy that is the key to improving care delivery, patient outcomes and experience, team member experience, and adding needed value to the system.

Let me provide a few specifics regarding the benefits of innovation when it comes to quality of care. Throughout our 18-hospital system, we have reduced preventable deaths, reduced hospital-acquired infections by 42% since 2018, reduced preventable readmissions, surgical complications, and falls. And our patient satisfaction scores improved 23% during the last few years, greatly outperforming the national rate of improvement. Last year, our flagship academic medical center, Hackensack Meridian Health, was included in U.S. News & World Report’s Honor Roll, making it one of the top 20 hospitals in the nation, the first time a New Jersey hospital was recognized.

When the network was created in 2016, I had a goal of making the Honor Roll in 10 years. We achieved this a year early and here’s how we did it: we created a culture that focuses on safety and quality. We take the best and most innovative practices and disseminate them across the entire network, a major advantage of an 18-hospital system. And our teams are extraordinary!

Regarding technology, we also take an integrated, system-wide approach. We embrace AI and machine learning to enhance disease detection, precision



*The CEO Forum Group has selected Robert C. Garrett, CEO, Hackensack Meridian Health, as a recipient of the 2026 Transformative CEO Award in the exclusive category of **Innovation**, and has further recognized the organization for the #1 spot in the official ranking of *The Top 10 Businesses in America*. This is bestowed for advancing innovation across healthcare delivery, research, and integrated networks to improve patient outcomes. As CEO, Garrett has driven transformative growth while fostering a culture of excellence, compassion, and forward-thinking leadership.*

treatment, streamlining administrative and clinical efficiencies, capacity management, and burnout alleviation, creating personalized and equitable experiences, research, and innovation.

This has a major impact on people’s lives. Physicians can detect chronic kidney disease earlier, which can help delay dialysis or even a transplant. We are using AI to help doctors transcribe patient notes, which results in two or more extra hours a day for them to recharge their batteries. This helps alleviate physician burnout, which is an epidemic in the industry.

“The key to successful innovation at a large health network is integration.”

Many organizations innovate in pockets. What does it take to operationalize innovation across 500+ locations and millions of patient interactions?

The key to successful innovation at a large health network is integration. We have worked diligently at

Robert C. Garrett



Hackensack Meridian to create seamless connections for patients regardless of where they seek care. Too often, the story of American healthcare is one of fragmentation: patients often go from treatment to the pharmacy to physical therapy in various locations, with records and systems of care that do not travel with them.

We start with a uniform approach in how patients connect with us. We operate a centralized contact center in New Jersey that supports patient scheduling, registration and inquiries for the network's 18 hospitals and more than 500 patient care locations. We are equally focused on innovating care in state-of-the-art facilities, wellness and prevention programs, and enhancing every connection point.

We are committed to providing the most innovative care throughout the network, from the basic to the complex. A few examples: we have invested \$450 million to expand ambulatory care throughout New Jersey with two dozen new locations, making care more convenient and affordable. People can get primary or specialty care, diagnostics, labs, and more under one roof and enjoy valet parking. Additionally,

we have created innovative partnerships to expand access to care. For example, we have partnered with Amazon and opened two One Medical locations, a hybrid of in-person and virtual care. We plan to open a total of 20 in the next several years.

When it comes to complex care, we are working just as diligently to expand innovative treatment throughout New Jersey. We have the largest Phase I Clinical Trial program in the state at John Theurer Cancer Center, which enrolls more than 1,500 patients per year in more than 400 clinical trials. As an integrated system, we expanded our transplant program to our academic medical centers. We also offer High Intensity Focused Ultrasound for the treatment of essential tremor and Parkinson's Disease tremor in three locations, and the network remains the first and only healthcare system offering this minimally invasive treatment in New Jersey.

You mentioned ambulatory expansion. What promoted the decision to place care hubs in major transportation centers, and what does that signal about the future of access and delivery models?

Hackensack Meridian is the first health system in the U.S. to open a health and wellness center in a major travel hub because we want to connect with people where they live, work, and play. The \$200 million project will include primary care, medical specialties, surgical specialties, a sports and spine center of excellence, advanced imaging, phlebotomy, rehabilitation services, a retail pharmacy, occupational health services, and an urgent care.

Keep in mind that about one in three Americans don't have a primary care physician. For people 30 and under, it's half. Without this care, people don't get screenings, preventive care, etc. This project is one of several strategies underway at HMM to expand access to care.

We believe this project, which opens in the spring, will establish a framework for future transit

CEO, Hackensack Meridian Health

“Hackensack Meridian is the first health system in the U.S. to open a health and wellness center in a major travel hub because we want to connect with people where they live, work, and play.”

hubs to emulate. It expands care for people with transportation issues; it is extremely convenient and offers commuters and consumers great options for care.

The model will also include about 230 residential units as well as HMH corporate offices. With the residential growth in the immediate area surrounding Metropark and the surrounding communities, there will be a greater need for accessible healthcare that the Hackensack Meridian Health and Wellness Center will be able to accommodate.

How do you build and sustain a culture of innovation across 36,000 team members in such a complex enterprise?

Hackensack Meridian Health fosters a robust culture of innovation through its Center for Discovery and Innovation (CDI) and the Hackensack Meridian Health Research Institute. By uniting researchers, clinicians, and commercial partners, the network accelerates breakthroughs in cancer, infectious diseases, and regenerative medicine. There's another key component to discovery, what we call Bear's Den. It's kind of like Shark Tank in which outside



Bob Garrett, the state health commissioner, and Hackensack Meridian School of Medicine leadership with graduating students on Match Day March 2026

Robert C. Garrett

“There’s another key component to discovery, what we call Bear’s Den. It’s kind of like Shark Tank in which outside companies, as well as all 38,000 team members, bring forth innovative solutions.”

companies, as well as all 38,000 team members, bring forth innovative solutions. This is really one of my favorite aspects of creating an innovative culture because we rely on our front-line experts to share winning ideas. I get in on the action and join our experts, legal and financial pros, and select the winners. The organic nature of this innovation will make all the difference as we scale these great solutions.

Here are a few ideas from team members that we are piloting. We provide iPads equipped with speech-generating applications to patients who are unable to communicate verbally. This helps reduce anxiety and

frustration associated with communication barriers. Additionally, a team at one of our children’s hospitals created Pediatric Safari Adventure, a scavenger hunt to motivate patients to move. Since its launch in 2017, Bear’s Den has successfully advanced numerous internal strategies and external companies focused on streamlining care delivery, reducing hospital readmissions, and empowering patients to partner with their physicians.

The Hackensack Meridian School of Medicine is one of the most innovative medical schools in the U.S. because it focuses as much on prevention as curing illness and disease. Now that the school is



Bob Garrett being interviewed by Dan Peres, President of Modern Healthcare, at Leadership Symposium in Washington D.C. in September 2025

preparing to graduate its sixth class, is it achieving all that you had hoped?

The School of Medicine is exceeding all of my expectations! It's one of my proudest achievements to transform healthcare and I will tell you why. We opened the school to increase the pipeline of physicians in New Jersey and to reinvent medical education. To date, we have graduated 400 physicians, half of whom have served residencies in New Jersey, mostly at Hackensack Meridian hospitals. They are now practicing medicine in the Garden State. And we are also fortunate to have many graduates serving residencies in other prestigious institutions and hospitals around the nation including Yale-New Haven Hospital, Brown University/Rhode Island Hospital, and Johns Hopkins Hospital.

Beyond strengthening the physician workforce, our goal was to innovate care delivery at the beginning, in how physicians are taught. We are committed to creating generations of doctors who will focus as much on maintaining health as curing illness. Research indicates that social factors can determine up to 80 percent of health outcomes. Our students understand that financial issues, unstable housing, and anxiety can have as much impact on health as diabetes or hypertension.

“Beyond strengthening the physician workforce, our goal was to innovate care delivery at the beginning, in how physicians are taught.”

This is why we created the Human Dimension program and send our students out into the community in the first days of their medical school and right through the next three years. They connect with families in underserved communities so that they understand the root causes of health and illness and the importance of prevention. This approach of

focusing on the social determinants of health has made the school a national trailblazer. It is driving major reform at health systems and medical schools throughout the country.

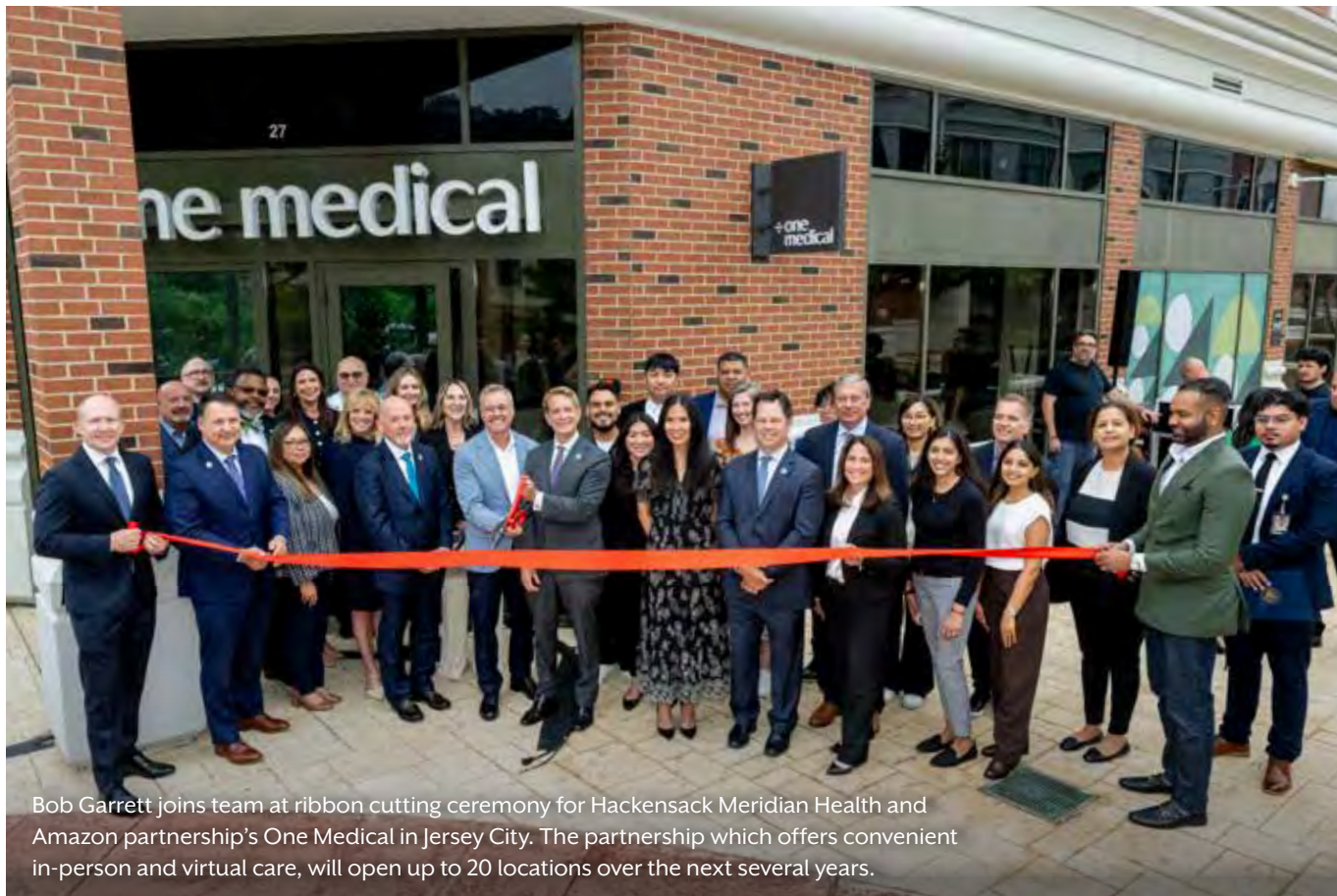
This same philosophy, focusing on the Social Determinants of Health, led to the network developing an innovative screening process that is helping millions of people. What leadership decisions enabled that kind of measurable, system-wide execution?

When you think of healthcare innovation, you have to address the 80 percent of non-medical factors that determine outcomes. I like to think of it as addressing what's not in the patient's medical record. Several years ago, working closely with our Board of Trustees, we agreed that this focus must be one of our strategic priorities because it has such a tremendous impact on health.

“When you think of healthcare innovation, you have to address the 80 percent of non-medical factors that determine outcomes. I like to think of it as addressing what's not in the patient's medical record.”

It's clear that there is not only a moral imperative to help people everywhere have a chance at optimal health, but there is a financial imperative as well. Investing in prevention and community health not only saves lives, but delivers real value in our health system.

Consider this: every dollar invested in prevention programs yields \$6 in savings money that could fund research into Alzheimer's disease, diabetes, and cancer, or help us conquer deadly pathogens in another pandemic.



Bob Garrett joins team at ribbon cutting ceremony for Hackensack Meridian Health and Amazon partnership's One Medical in Jersey City. The partnership which offers convenient in-person and virtual care, will open up to 20 locations over the next several years.

Since the end of last year, we have screened more than 3.4 million people and made nearly 8 million referrals to community services they may not even know exist. Through a digital platform, we connect them with food banks, rental and utility assistance organizations, and so much more.

We also launched a program to provide medically tailored meals for vulnerable patients in the first week they are discharged to decrease the risk for an unnecessary hospitalization. We have helped more than 2,800 patients and provided about 40,000 meals. And last year, we sponsored the HMH Day of Connection and provided 10,000 people in shelters with warming kits—hats, socks, gloves, etc., and food gift cards. We reached people in every county in New Jersey, which was very satisfying.

“AI will continue to further enhance clinical decision-making, document care, and reduce burnout, with a focus on “Trustworthy AI” to manage risks. That said, there will never be a time when AI is making decisions without human intervention.”

Looking ahead, what does the next chapter of enterprise innovation at Hackensack Meridian Health look like over the next five years?

Even with the challenges we face in the industry, I have never been more optimistic about the future of healthcare at HMM and throughout the nation. We will continue to see advances in generative AI and clinical automation. AI will continue to further enhance clinical decision-making, document care, and reduce burnout, with a focus on “Trustworthy AI” to manage risks. That said, there will never be a time when AI is making decisions without human intervention. You will see an expansion of virtual and home care including hospital-at-home programs in which patients are “admitted” to their homes for acute level care. This is a transformative care model that is becoming one of the most important healthcare innovations, improving patient outcomes, patient satisfaction, and decreasing the cost of healthcare.

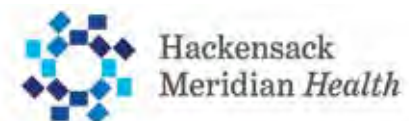
Since the program’s inception in April 2024, we have admitted more than 1,700 patients, which has freed up 8,000 bed days at participating hospitals. Imagine what volume will be in a few more years!

It’s also exciting to think about the next-generation sequencing and data analytics to tailor treatments, especially in oncology, to individual genetic profiles for better outcomes. HMM opened the Hennessy Institute for Cancer Prevention and Applied Molecular Medicine for precisely this purpose. The groundbreaking program aims to improve access to inform cancer risk care, shift cancer diagnoses to earlier stages, and reduce cancer burden at scale.

We will see continued growth in advanced, consumer-centric devices that track health in real-time, closing the gap between measurement and actionable, personalized guidance. There’s so much more and I can’t wait to see what’s coming next!



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.





Building a resilient supply chain

USA Rare Earth CEO Barbara Humpton makes the case that rare earth elements — the materials powering everything from electric vehicles to AI infrastructure — have become one of the most critical strategic resources of our time. She explains how every CEO needs to understand their dependence on these materials before the next disruption forces their hand.



The CEO Forum Group has selected USA Rare Earth and Barbara Humpton, CEO, as a recipient of the 2026

*Transformative CEO Award in the exclusive category of **American Industrial Power**. This recognition is bestowed for creating new value by advancing a domestic rare earth and magnet value chain that is helping restore America's industrial strength, reduce critical dependence on foreign-controlled supply chains, and power the advanced technologies essential to U.S. competitiveness, including defense, AI, energy, transportation, and advanced manufacturing.*

Interviewed on May 22, 2026

Robert Reiss: You spent years leading Siemens USA. What inspired you to leave that role and become CEO of USA Rare Earth?

Barbara Humpton: Throughout my career, I've been drawn to missions that matter. During my time at Siemens, I came to understand just how dependent the modern world has become on critical minerals—particularly rare earth elements and the permanent magnets that they make possible. These materials power motion, energy, manufacturing, transportation, and increasingly, artificial intelligence. When the board of USA Rare Earth approached me and presented the opportunity to help solve what I believe is one of the most important business challenges of our time, I didn't hesitate. It was an opportunity to work on an issue that affects not just one company or one industry, but the future competitiveness and security of the entire nation.

Many CEOs hear the term “rare earths” and assume it's a niche technical topic. Why should every CEO care?

Rare earths are not a niche issue. They are embedded in almost every sector of the modern economy. Anything that moves, rotates, generates power, or relies on high-performance electric motors depends on permanent magnets. Those magnets depend on rare earth elements. These rare earth minerals are inside automobiles, aircraft, defense systems, robotics, industrial equipment, wind turbines, semiconductors, consumer electronics, and increasingly AI-driven systems.

For years, most business leaders never had to think about where these materials came from because the supply was available and relatively inexpensive. But the reality is that rare earth minerals have become one of the most strategic resources in the world and are directly tied into the future of manufacturing, defense and are at the heart of AI. When access to them becomes constrained, entire industries become vulnerable. CEOs who ignore this issue may eventually discover that they don't have access to the components required to manufacture their products.

“The reality is that rare earth minerals have become one of the most strategic resources in the world and are directly tied into the future of manufacturing, defense and are at the heart of AI.”

Why has this become such a critical geopolitical issue?

Over the last three decades, China made a deliberate decision to dominate the rare earth ecosystem. While the rest of the world focused on purchasing low-cost materials, China focused on building long-term strategic control.

This wasn't limited to mining. China systematically developed expertise and capacity across every step of the value chain—mining, processing, separation,

metal production, magnet manufacturing, and component production. The result is that today, China holds an overwhelming position in many parts of the rare earth supply chain. What began as an economic advantage has evolved into a strategic advantage.

For many years, businesses were happy with this arrangement because prices were low. But low cost often obscures risk. Today we're discovering that dependence on a single source creates vulnerabilities that affect entire economies.

“Low cost often obscures risk.”

What happens if access to rare earths become restricted?

We received a glimpse of that reality recently. When China began restricting access to certain materials, manufacturers quickly realized how exposed they were. Auto manufacturers, for example, faced the possibility of significant production disruptions. But automobiles are only the beginning.

Without rare earths and permanent magnets, we cannot build advanced aircraft. We cannot manufacture many semiconductor technologies. We

cannot scale robotics. We cannot fully realize the future of artificial intelligence.

The challenge isn't theoretical anymore. It affects the physical foundation of the modern economy. AI may dominate headlines, but AI infrastructure ultimately requires physical systems, and those physical systems depend heavily on rare earth materials.

Some people compare rare earths today to oil in the twentieth century. Is that a fair comparison?

In many ways, yes. There's a famous quote attributed to Deng Xiaoping: “The Middle East has oil; China has rare earths.” Oil powered the industrial age. Rare earths help power the digital and intelligence age.

The difference is that many executives still don't fully appreciate how dependent their businesses are on these materials. That's beginning to change as companies start tracing their supply chains and discovering just how many critical components depend on rare earth magnets.

“Oil powered the industrial age.
Rare earths help power the digital
and intelligent age.”

How does AI increase the urgency of this issue?

AI is often discussed as software, algorithms, and computing power. But physical AI requires physical infrastructure. Robots require motors. Data centers require cooling systems. Transportation systems require electrification. Industrial automation requires precision motion control. All of these systems rely on permanent magnets made with rare earth elements.

The more we advance toward an AI-driven economy, the more demand we create for these materials. That's why some investors and business leaders recognized this challenge years ago and began investing in





Humpton touring USA Rare Earth's facility in Stillwater, Oklahoma

alternative sources of supply before geopolitical tensions intensified. They understood that future demand would only increase.

What exactly are rare earth elements?

If you look at the periodic table, you'll find a group of elements located in the rows at the bottom. These include materials such as neodymium, praseodymium, dysprosium, terbium, and ytterbium. What makes them valuable is not simply their existence but the extraordinary properties they contribute when combined with other materials.

They enable metals to perform at higher temperatures. They improve magnetic performance. They allow magnets to maintain magnetism under demanding and extreme operating conditions. These properties make them indispensable in advanced technologies ranging from electric vehicles to aerospace systems.

You've said the world doesn't just have a supply chain problem—it has a value chain problem. What's the difference?

For decades, companies focused on optimizing supply chains for efficiency. The goal was often simple: reduce costs, improve logistics, and create just-in-time delivery systems. That approach worked well when supplies were abundant and geopolitical risks were low. Today, however, resilience matters as much as efficiency.

What we need now is a fully functioning value chain that connects every stage of production—from mining and processing to metals, magnets, and finished products. Every participant must have visibility into both supply and demand.

If one link breaks, the entire system becomes vulnerable. That's why USA Rare Earth is focused on integrating multiple stages of the value chain. Communication and coordination across the chain are essential if we're going to scale successfully and build resilience.

What is USA Rare Earth building to address this challenge?

USA Rare Earth is building a complete rare earth ecosystem. Our vision includes mining, processing, separation, metal production, and magnet manufacturing. The goal is not simply to extract materials but to rebuild capabilities that have largely disappeared outside China.

We've already made significant progress. We acquired Less Common Metals, one of the last scaled rare-earth metal producers outside China. We have magnet production capabilities operating today. We are building the processing and separation infrastructure required to support future growth.

Over the next several years, we intend to establish a fully integrated platform capable of supplying critical industries across America and beyond.



Round Top Mine in
Hudspeth County, Texas

What role has government support played?

Government support has been important because policymakers increasingly recognize that this is a national security issue as much as an economic issue.

The Department of Commerce conducted extensive due diligence on our business and our plans. Their willingness to support domestic rare earth capabilities reflects a broader recognition that strategic industries require strategic investments.

The objective isn't merely to create another mining company. The objective is to rebuild capabilities that are essential for economic competitiveness, defense readiness, and technological leadership.

What should CEOs be doing right now?

First, CEOs need awareness. Most executives don't know where the rare earth content in their products originates. They need to ask that question.

Second, they need to understand their dependencies. Where are the magnets coming from? Where are the critical materials sourced? How concentrated are those supply chains?

Third, they need diversification. Any business dependent on a single source should be exploring alternatives.

Finally, they need to think about resilience. For years procurement teams focused almost exclusively on lowering costs. Today's question is different: What is the cost of having no supply at all?

That perspective changes the conversation dramatically.

“CEOs need awareness. Most executives don't know where the rare earth content in their products originates. They need to ask that question.”

You've used the phrase “insurance supply.” What does that mean?

Every executive understands insurance. You hope you never need it, but you're grateful it's there when a disruption occurs. Supply chain resilience works the same way. Organizations should evaluate whether maintaining diversified sources and strategic inventory is worth the additional investment.

If a critical material shortage shuts down production, the financial impact could dwarf any savings generated through aggressive cost optimization. In today's environment, resilience has economic value.

You've also told me, Barbara, a very personal leadership lesson. Share how you've taken what you learned into business.

Midway through my career, my son became seriously ill. It was one of the most difficult experiences I've ever faced. During that period, I learned something profound: there are things we can control and things we cannot.

The more energy we spend reacting emotionally to circumstances beyond our control, the less energy we have available to solve problems.

That experience taught me to remain calm during uncertainty, focus on actionable steps, and move forward with discipline. Ironically, that lesson applies directly to the rare earth challenge. Instead of worrying about vulnerability, we should focus on building the capabilities that allow us to control our future.

“The more energy we spend reacting emotionally to circumstances beyond our control, the less energy we have available to solve problems.”

If you could leave CEOs with one message, what would it be?

The time to act is now. Not next year. Not after another disruption occurs. Every CEO should understand where rare earth materials enter their products, how dependent they are on concentrated supply chains, and what actions they can take to diversify risk.

This isn't simply a procurement issue. It's a strategic issue. It's a competitiveness issue. It's a national security issue.

The organizations that address it early will be more resilient, more secure, and better positioned for the future. Those that wait may discover that their greatest vulnerability was hiding in a tiny component they never thought to examine.



Barbara Humpton is Chief Executive Officer of USA Rare Earth, Inc., where she leads the Company's efforts to build a secure, domestic rare earth supply chain spanning mining, processing, and magnet production. Humpton previously served as President and Chief Executive Officer of Siemens USA from 2018 to 2025, overseeing approximately 45,000 employees across all 50 states and Puerto Rico and more than \$21 billion in annual revenue. During her tenure, she led the company's U.S. strategy across industrial, energy, and infrastructure sectors. Prior to joining Siemens in 2011, she held senior leadership roles at Booz Allen Hamilton and Lockheed Martin, where she was responsible for large-scale system integration programs focused on biometrics, border and transportation security, and critical infrastructure protection.

Ms. Humpton serves as Chair of the Center for Strategic and Budgetary Assessments and as Vice Chair of Chief Executives for Corporate Purpose. She is also a member of the Board of Directors of the Federal Reserve Bank of Richmond and the Economic Club of Washington, D.C. She holds a Bachelor of Science in Mathematics from Wake Forest University. Her leadership experience across industrial, infrastructure, and national security sectors positions her to guide the Company's growth in building a resilient domestic rare earth supply chain.





The Future of Organizational Culture in an AI World

Why Humans Still Matter More Than Ever

By: Shawn Gulyas, CEO, Founder & Thought Catalyst with humanworks8

AI is extraordinary. Humans are, too.

Yet as artificial intelligence accelerates—rewriting workflows, compressing decision cycles, and redefining the very nature of work—a quiet risk emerges for high-performing organizations: confusing technological intelligence with organizational intelligence.

AI can process data. It cannot create meaning.

AI can optimize systems. It cannot establish belief.

AI can scale decisions. It cannot decide what truly matters.

The future of organizational culture will not be determined by how sophisticated your AI stack becomes, but by whether your leadership philosophy keeps pace with what makes intelligence real: human judgment, human connection, and human belief systems.

Now is the moment for CEOs to confront a difficult but necessary question:

Are humans getting lost in the AI and culture conversation at your organization?

Artificial Intelligence vs. Real Intelligence

AI operates from logic and patterns. Humans operate from breath, belief, creativity, and heart. One learns from historical data; the other learns from lived experience. One answers questions; the other knows how to ask better ones.

Leadership has always lived at the intersection of art and science. AI tilts the equation heavily toward science. Culture, if neglected, becomes collateral damage.

This is why the most future-ready cultures will not merely adopt AI, but intentionally recenter on their people. And no framework accomplishes this more clearly than humanworks8's 8 Truths about People.

The 8 Truths as the New Cultural Operating System

Every strong culture rests on an unchanging foundation: what leaders and organizations believe

to be true about people. humanworks8 articulates this foundation with clarity and courage through eight immutable truths:

- **Everyone's Unique**
- **Everyone Believes**
- **Everyone Connects**
- **Everyone Contributes**
- **Everyone Rises**
- **Everyone Learns**
- **Everyone Thrives**
- **Everyone Matters**

These are not aspirational slogans. They are human facts, as real and enduring as the natural and human-made wonders that have inspired awe for centuries.

Cultures that outperform do not add complexity. They commit to simplicity and depth. The 8 Truths form a belief system that cuts through noise, modern fads, and “framework fatigue.” They create a shared human language, which is something AI, by definition, does not possess.

For CEOs, this matters because belief systems shape behavior faster than policies ever will.

From Truths to Touchpoints: Where Culture Lives or Dies

Beliefs only become culture when they show up in everyday experiences. This is where most organizations fail, not in strategy decks, but in execution discipline.

The 8 Truths lead directly to the 8 People Touchpoints—the lived experiences and organizational practices where employees decide whether they trust, stay, contribute, and grow:

- **Talent Discovery—Everyone's Unique:** How you place the right people in the right roles, beyond resumes and algorithms.
- **Strategic Planning—Everyone Believes:** How vision and values become a living plan, not static slides.
- **Teamwork—Everyone Connects:** How invisible human bonds outperform technical alignment.

- **Communication—Everyone Contributes:** How truth actually travels inside your organization.
- **Performance Management—Everyone Rises:** How growth replaces compliance.
- **Leadership Development—Everyone Learns:** How leaders are prepared for moments that matter most.
- **Change & Transition—Everyone Thrives:** How clarity replaces chaos during onboarding, exits, and restructuring.
- **Belonging—Everyone Matters:** How humans know, without being told, that they are valued.

AI will increasingly touch every one of these domains. The question is whether people remain central within them.

What CEOs Must Do Differently Now

AI does not absolve leaders of responsibility; it amplifies it. The future CEO is not the most technologically fluent, but the most humanly intentional—focused on the human experience in their organization. The organizations that win will be those that:

- Use AI to remove friction—not humanity.
- Design systems that scale judgment—not replace it.
- Anchor innovation in belief—not novelty.

Culture has always been your quietest competitive advantage. In an AI world, it becomes your loudest differentiator.

The question isn't whether AI will reshape your organization—it already is. The real question is whether you believe in and are committed to The 8. Because in the end, AI will change how work gets done, but only humans will decide why it matters.



Shawn Gulyas is CEO of humanworks8, the visionary architect of the next generation of workplace culture practices.



In 2021, Alan B. Miller stepped aside as CEO, transitioning leadership of UHS to his son, Marc D. Miller.

Building a legacy

For Universal Health Services, Inc. (UHS), leadership reflects both a powerful legacy and a dynamic future. UHS Founder and Executive Chairman Alan B. Miller built the organization he founded in 1979 into one of the nation's largest healthcare providers, and in 2021, after 42 years as CEO, seamlessly transitioned responsibility to Marc D. Miller, who himself brings decades of experience within the company and a deep understanding of its operations and culture.



The CEO Forum Group has selected Universal Health Services, Inc., as one of the Top 10 Businesses in America—a recognition bestowed for building arguably the nation’s most disciplined and scalable healthcare system. For this distinction Marc D. Miller, CEO of UHS, has been awarded a Transformative CEO Award for his exceptional leadership.

*Marc D. Miller was recently honored as recipient of the 2025 Transformative CEO Award in the exclusive category of **Operational Excellence**, after having been named a 2024 Transformative CEO for the focus area of Behavioral Health. Additionally, Alan B. Miller, Founder & Executive Chairman of UHS, is further recognized as inaugural recipient of the CEO Forum’s Lifetime Achievement Transformative CEO Eagle Award. As CEO of the company for over 42 years, Miller created a culture grounded in performance, consistency, accountability, and long-term clinical excellence. These recognitions are exemplified by the de novo Alan B. Miller Medical Center, opening in Palm Beach Gardens, Florida, as a national model of high-quality care, innovation, and service excellence.*

This conversation comes at a meaningful point in that transition—where a remarkable legacy meets next-generation, forward-looking leadership. UHS continues to advance with strategic clarity and operational strength in an increasingly complex healthcare environment. We begin the conversation by hearing from Alan, whose vision established the foundation, before turning to Marc to discuss how he is building on that legacy and guiding the company into its next chapter.

Interviewed on December 16, 2025

Robert Reiss: When you founded UHS, what problem in American healthcare were you most determined to solve, and how did that early vision shape the company we see today?

Alan B. Miller: I founded Universal Health Services, Inc. (UHS) in 1979 after American MediCorp, of which I was CEO, was involved in a hostile takeover. I believe healthcare to be the highest calling, and I wanted to make a difference for people and their families—not only in providing care but providing the kind of care I would want for my own family. I sought to grow a network of hospitals that would provide greater access to high-quality care across communities.

Over time, with success in fulfilling our mission

and with a focus on operational efficiency, we grew through both acquisition and de novo hospital builds. We entered the behavioral health space in 1983, entered the U.K. market in 2014, and recently announced our largest acquisition yet, expanding into virtual behavioral healthcare that highly complements our existing offerings. As we continue to grow, we build upon the foundations of patient-centered care, operational excellence, physician and community alignment, and strategic investment that define our company today.

UHS has grown into one of the nation’s leading healthcare providers with an ongoing focus on high-quality care, community engagement, and innovation.

When you started the company with just six employees, how did you persevere?

Alan: As Founder, Chairman of the Board and CEO, I always prided myself on hard work, hiring the right people and delivering on promises. Perseverance is rooted in resilience, strategic vision, and a commitment to achieve great things. I am a competitive person with very high standards and always have been.

I would say the combination of entrepreneurial grit, financial discipline, and a mission-driven approach

Alan B. Miller & Marc D. Miller

to healthcare has allowed UHS not only to endure but to grow into one of the nation's largest and most respected healthcare providers, with more than 101,500 employees today.

What is your leadership philosophy on building a great culture and exceptional customer service?

Alan: I established a leadership philosophy focused on a foundation of excellence, accountability, compassion, and teamwork. The company mission established in 1979 still stands today: to provide superior quality healthcare services that patients recommend to family and friends, physicians prefer for their patients, purchasers select for their clients, employees are proud of, and investors seek for long-term returns.

“We believe that a great patient experience is driven by the compassion, competence, and commitment of our employees.”

At the core of this philosophy is a patient-first mindset, where everything begins with delivering safe, high-quality care and an exceptional patient experience. We have built a culture of service excellence in which every interaction matters, and every employee is trained to provide care that is professional, timely, effective, and efficient.

Equally important is how we treat our people. We believe that a great patient experience is driven by the compassion, competence, and commitment of our employees, so we invest heavily in attracting, developing, and retaining top talent while believing every team member should be treated with dignity and respect.

This is all supported by a strong ethical foundation. We hold ourselves to high standards of integrity and accountability, which fosters trust across patients,



employees, and partners. At the same time, we remain deeply connected to the communities we serve, with our leaders actively engaged locally as employers, partners and contributors to community well-being.

This holistic approach presents us as a healthcare provider committed to excellence in care and service, ensuring every encounter reflects our purpose and values.

Looking back over decades of growth, what are the core elements of the operating model, including the balance of behavioral health and acute care, that have allowed UHS to scale while maintaining quality and discipline, and that position you moving forward?

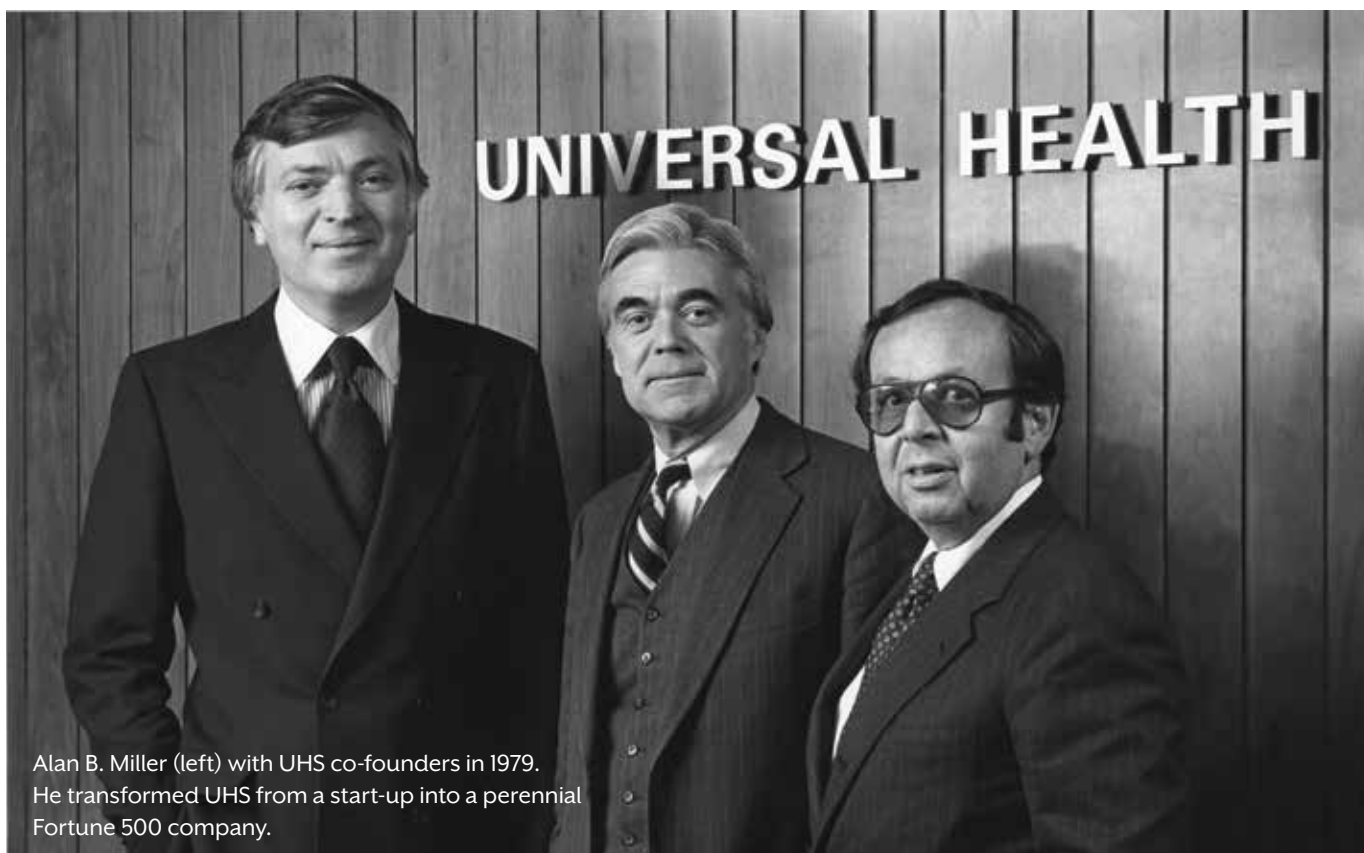
“Our growth has always been measured and disciplined. We take an intentional approach, with leadership focused on clinical quality, patient safety metrics and the specific needs of the communities we serve.”

Alan: Our core operating model is built on quality, discipline, and strategic portfolio balance. Under Marc’s leadership since 2021, the company continues on our strong trajectory and has a bright future.

Our operating model is grounded in an unwavering focus on quality and accreditation, with superior patient care at the center of everything we do. We have always approached care as if we are treating members of our own family, and that commitment continues to drive patient safety, clinical excellence and continuous improvement across all of our facilities.

At the same time, we have built a model of balanced

diversification. UHS began with a foundation in acute care and expanded into behavioral health in 1983, ultimately becoming one of the largest facility-based behavioral health providers in the United States. Our approach to “whole-person care” integrates both physical and mental health, strengthening clinical outcomes, and reinforcing community support. We also diversified geographically, first entering the French market and then launching in the United Kingdom in 2014, where we have continued to grow as a trusted provider and partner to the National Health Service. Additionally, we expanded our capabilities in 2012 with the establishment of Independence Physician Management, our physician services unit, and in 2014 through the acquisition



Alan B. Miller (left) with UHS co-founders in 1979. He transformed UHS from a start-up into a perennial Fortune 500 company.

Alan B. Miller & Marc D. Miller



Alan B. Miller rang the Closing Bell at the New York Stock Exchange in 2019, commemorating UHS' 40th anniversary.

of what is now Prominence Health, which provides health insurance plans, value-based care models including Accountable Care Organizations and consulting services.

Our growth has always been measured and disciplined. We take an intentional approach, with leadership focused on clinical quality, patient safety metrics and the specific needs of the communities we serve. Every acquisition and expansion is carefully evaluated to ensure alignment with our mission and our ability to deliver excellence. Our overall posture remains conservative and deliberate.

We are equally committed to community-centric operations. From the beginning, my goal was to build hospitals in underserved areas, addressing gaps in healthcare access while ensuring that every facility meets high standards and fosters strong, lasting relationships within its community.

Across both our acute care and behavioral health divisions, we maintain a strong emphasis on clinical excellence and innovation. We continuously advance patient outcomes through evidence-based care and strong clinical leadership, and our facilities are regularly recognized for safety, quality, and patient experience. Most of our acute care hospitals consistently earn “A” or “B” safety grades from The Leapfrog Group, and many are recognized by U.S. News & World Report. In behavioral health, our facilities achieved an average patient satisfaction rating of 4.4 out of 5 in 2025, with 90% of patients reporting they felt better following care and 84% demonstrating statistically meaningful improvement.

Underlying all of this is a culture of discipline and accountability. Our success is supported by strong ethical standards and a deep commitment to ongoing professional education. People at every level of the organization are engaged in decision-making and

“UHS encourages leaders to embrace innovation, leverage data and adopt best practices that drive both care quality and operational efficiency.”

continuous improvement, creating high-performing teams that are dedicated to delivering compassionate, high-quality patient care.

This integrated operating model, balancing acute care and behavioral health with rigorous quality standards and disciplined growth, has allowed UHS to scale responsibly while maintaining excellence and a strong reputation in healthcare within both the U.S. and U.K.

UHS has become one of the largest behavioral health providers in the world. Why did you believe behavioral health would become such an essential pillar of the healthcare system?

Marc D. Miller: With my father at the helm, UHS recognized early in its growth journey that behavioral health was an essential pillar of the healthcare system due to the critical role mental and behavioral health play in overall patient well-being and community health.

The foundation of this belief lies in a clear understanding that mental and behavioral health conditions profoundly affect not only an individual's quality of life but also their physical health outcomes. Effective treatment of behavioral health disorders often leads to improved management of chronic medical conditions, enhanced recovery rates and better long-term health—hence the importance of “total patient care.”

Historically, behavioral health has been underserved, stigmatized, and fragmented from overall care delivery, causing significant gaps in patient care. UHS foresaw these challenges and the urgent need for high-quality, specialized behavioral health services delivered with the same rigor and commitment as acute medical care.

UHS' commitment to behavioral health reflects the company's dedication to addressing unmet needs and reducing stigma through comprehensive, evidence-based treatment and services. By becoming one of the largest behavioral health providers in the U.S. and globally, UHS has reinforced its mission to serve patients holistically, supporting their mental, emotional, and physical health, which are deeply interconnected.

Further, the rise in awareness of mental health issues, exacerbated by societal stressors and public health crises, underscored the importance of expanding behavioral health capacity. UHS' strategic investments in behavioral health facilities and robust outpatient programs, clinical expertise and community-based programs align with broader healthcare transformation focused on integrated care models. This integration helps ensure that patients receive coordinated, compassionate care that addresses the full spectrum of health needs.

Behavioral health has become a cornerstone of the healthcare system because of its essential impact on patient outcomes, its historically underserved status and the growing societal recognition of mental health's importance. To serve these needs, we have established—and continue to grow—an extensive network of behavioral health services, advancing quality, access, and innovation in this vital area of care.

What do you see as the future of behavioral health in America?

Marc: The future of behavioral health in America is one of expanded access, integrated care and innovative technology-enabled solutions—a future that UHS is actively advancing through our recently announced acquisition of Talkspace, with a network of approximately 6,000 licensed providers, to which



over 200 million individuals across all 50 states, D.C., and Puerto Rico currently have access.

Talkspace's patient-centric, clinically driven virtual platform perfectly complements the high-quality services delivered at UHS facilities—enabling us to expand access and offer more flexible, stepped solutions to address the growing demand for behavioral healthcare. This acquisition aligns with our core growth objectives by accelerating the company's outpatient and telehealth behavioral health strategies, diversifying the payor mix and delivering a comprehensive, technology-enabled, end-to-end continuum of care that supports innovative approaches to mental health services.

The acquisition also positions UHS to be a national leader in scaling behavioral health services while maintaining clinical excellence and improving outcomes. With millions of therapy and psychiatry sessions delivered annually through Talkspace alone, the integration aims to enhance both patient experience and clinical efficacy.

UHS' vision for behavioral health's future is one where digital innovation and facility-based expertise unite to expand access, improve quality, and deliver patient-centered care on a national scale—creating

the industry's first, modern behavioral health ecosystem responsive to the evolving needs of patients and communities.

What has been most important in developing the next generation of leadership at UHS?

Marc: Developing the next generation of leadership at UHS is guided by a steadfast commitment to cultivating a culture of excellence, accountability, continuous investment in talent, and leadership development/advancement from within the company. Central to this development is a philosophy that effective leaders must embody UHS' core values of compassionate patient care, operational discipline, and ethical integrity while driving innovation in a complex healthcare environment.

UHS invests significantly in structured development programs designed to equip emerging leaders with critical skills and competencies. This includes clinical and operational training, exposure to regulatory and quality standards, and immersive experiences fostering business acumen, strategic thinking, and problem-solving. Such programs offer mentoring, coaching, and leadership forums that foster peer learning and expanded perspectives.

Future leaders are entrusted early with responsibility and accountability for results. UHS creates environments where leaders learn to make strategic decisions while being held to high standards of compliance and patient safety, building resilience and confidence to manage diverse teams and complex healthcare operations effectively.

Recognizing the dynamic nature of healthcare, UHS encourages leaders to embrace innovation, leverage data, and adopt best practices that drive both care quality and operational efficiency. Developing this mindset ensures leaders remain agile and forward-thinking in a rapidly evolving industry.

The development of the next generation of leadership at UHS reflects a holistic approach that integrates values-based culture, rigorous training, empowerment, and innovation. These elements collectively prepare leaders to navigate healthcare's complexities while advancing UHS' mission to provide outstanding patient care.



Marc D. Miller speaks to UHS leaders and employees at the company's annual Hospital Management Conference.

The opening of the Alan B. Miller Medical Center represents a major milestone. What does this facility symbolize to you personally and for the future of healthcare in the region?

Marc: Set to open this spring in Palm Beach Gardens, Florida, the Alan B. Miller Medical Center symbolizes both the personal legacy of my father and a transformative advancement for healthcare.

Personally, the hospital represents the realization of his vision grounded in service, resilience, and community impact. Alan B. Miller's journey—starting UHS with just six employees and growing it into one of the nation's largest and most respected healthcare systems—is reflected in this center's dedication to providing superior care close to home... as he always says, care that he would want provided to his family.

It stands as a testament to his philosophy that a healthcare institution should be built on quality, accessibility, and respect for every patient and family who walks through its doors.

For the region and across the country, the Alan B. Miller Medical Center symbolizes a next-generation healthcare hub designed to meet evolving community needs with state-of-the-art technology, integrated services, and patient-centric environments. The seven-story hospital will feature private patient rooms within a healing environment designed to meet the needs of this growing community. The hospital will deliver a wide range of acute care services, emphasizing clinical excellence, advanced technology, and a true patient-first philosophy. The campus will include medical office buildings to house specialty services, a helistop, and thoughtfully landscaped areas. And, with shell space for build-out as demand increases, the hospital is poised to expand with the community.

Moreover, the hospital will serve as an anchor for community health and economic development, creating jobs and supporting local partnerships. Its

Alan B. Miller & Marc D. Miller

presence aims to enhance the region's healthcare resilience, capability, and access, reinforcing UHS' commitment to serving communities holistically.

The Alan B. Miller Medical Center is much more than a building; it is a symbol of UHS' foundational values, our founder's legacy, and a beacon for the future of high-quality healthcare that will serve generations to come.



A celebratory ribbon-cutting ceremony was held on April 29, 2026 in anticipation of the pending opening of Alan B. Miller Medical Center (below) in Palm Beach Gardens, Florida.

What is the UHS growth strategy looking ahead, and how are you embracing innovation?

Marc: Our UHS growth strategy is both focused and clear. We are investing strategically in our people, as well as in cutting-edge technology and advanced equipment, to ensure we continue delivering high-quality care and operational excellence. At the same time, we are accelerating the expansion of outpatient services across both of our operating segments, reflecting the growing demand for more accessible and flexible care delivery.

We are also expanding through new and complementary care models, whether that involves



“We are investing strategically in our people, as well as in cutting-edge technology and advanced equipment, to ensure we continue delivering high-quality care and operational excellence.”

increasing inpatient capacity, developing de novo facilities, or advancing outpatient and virtual care offerings. Alongside this, we remain disciplined in how we deploy capital, targeting compelling acquisition opportunities in high-growth sectors that expand our reach and support long-term returns.

This approach empowers our UHS subsidiary entities to excel both operationally and clinically, ultimately delivering sustained shareholder value.

Amid a dynamic healthcare environment, UHS is also driving innovation at scale by leveraging AI and advanced technologies to enhance quality, the patient experience and operational efficiency. Key initiatives

include our collaboration with General Catalyst, leadership in Hippocratic AI for safety-centered AI development, expanded implementations of electronic health records in Behavioral Health, and the 2025 rollout of Agentic AI to improve post-discharge support and reduce readmissions.

While AI is poised to become the most significant, additive disruptor in redefining operational efficiency, its true disruption lies not in replacing the human touch, but in unlocking substantial opportunities for process acceleration and margin improvement.



Alan B. Miller is Founder and Executive Chairman of UHS and Founder, Chairman of the Board, CEO and President of Universal Health Realty Income Trust. Prior to founding UHS, Mr. Miller was Chairman and CEO of American Mediacorp Inc., a pioneering hospital management company. Mr. Miller has received numerous

awards for his business and charitable activities, including recognition on Forbes' "America's Most Innovative Leaders" list; Modern Healthcare's "100 Most Influential People in Healthcare" for 17 consecutive years (2003-2019); the Distinguished Civilian Award (2019) by the Ben Franklin Forum in recognition of the behavioral healthcare delivered by UHS facilities to our nation's military; and the Lifetime Achievement award of the Federation of American Hospitals (1999). In May 2015, the Wall Street Journal ranked Mr. Miller for achieving 3,715 percent total shareholder returns since 1995.



Marc D. Miller was named CEO of UHS in 2021 after having served as President since 2009. Miller is a member of the Board of Directors of UHS and a member of the Board of Directors of Universal Health Realty Income Trust, a real estate investment trust that has investments in 76 properties located in 21 states. Miller served as

the Chair of the Board of Directors of the Federation of American Hospitals (FAH) in 2025 and served on Premier, Inc.'s on the Board of Directors from 2015-2025. Miller began his career with UHS in 1995 and has held various positions of increasing responsibility at hospitals and the corporate office. Among them, Miller served as COO at Wellington Regional Medical Center; and Assistant Administrator at The George Washington University Hospital. He also served as CEO/Managing Director of Central Montgomery Medical Center.

YOUR DESTINATION FOR HEALTHCARE



The Palm Beaches is now home to a brand-new hospital – **Alan B. Miller Medical Center** – a place where innovation meets compassion, where neighbors become patients, and where patients are treated like family.

Rising seven stories, the modern hospital features spacious, private rooms and family areas designed for comfort. With a deep commitment to a patient-first philosophy, Alan B. Miller Medical Center is ushering in a new era of healthcare excellence.

Operated by a subsidiary of Universal Health Services, Inc. (UHS), Alan B. Miller Medical Center is the newest addition to the company's nationwide portfolio of acute care hospitals, behavioral health facilities and ambulatory care access points.

➤ Learn more at
[ABMmedicalcenter.com](https://www.ABMmedicalcenter.com)



13655 Pasteur Boulevard | Palm Beach Gardens, FL 33418



4 WAYS THE ENTREPRENEURIAL MINDSET WORKS

By: Robert Reiss

What separates enduring leaders from everyone else is not strategy. It's how they think under pressure. After interviewing over 1,000 of the top entrepreneurs/CEOs over the past two decades, I have learned the difference is not that they have better answers; it's that they approach uncertainty, failure, and decision-making fundamentally different. As Stasia Mitchell, Global Entrepreneurship Leader at EY who oversees the ecosystem of EY Entrepreneur of the year awards puts it, "Entrepreneurs lead differently, not because they have better answers, but because they are always considering the questions not yet asked." She adds "There is a pattern in how they think and act. It is a mindset towards simplifying complexity and brings an attitude that suggests 'we got this.'" That pattern reveals itself most clearly in four ways which you can use immediately — additionally, if you use AI to help develop your strategy, you can plug these ideas in with your business model and challenges/opportunities:

1. Use Failure as a Strategic Advantage

Gary Shapiro, Executive Chair & CEO of the Consumer Technology Association and for 35 years leader of the world's largest conference CES (with over 140,000 executives and media a year), reinforces the same principle from a different vantage point, "You don't learn from success; success breeds arrogance. Failure is the great educator." Most leaders try to avoid failure. The best leaders use it. Ishan Patel, who as Founding CEO Audien Hearing built in under a decade the world's largest over the counter hearing aid company, states it plainly, "I'm not a product of my successes... I'm a product of my failures." He goes further, reframing what winning actually looks like, "I have failed more times, faster and forward, than anybody, and that's the reason I've gotten here." This is not rhetoric—it's a discipline.

2. Act on Conviction, Not Certainty

Great leaders are not waiting for perfect data. They are waiting for clarity. Fred Laluyaux, Co-Founder, President & CEO of Aera Technology – the visionary leader who created the self-driving enterprise where decisions are made by AI, draws a sharp line, "You don't become an entrepreneur because you want to be one. You become an entrepreneur because there is something you feel you can fix." Every CEO talks about resilience. Few define it clearly. For Laluyaux, it is the difference between impulse and endurance, "The impulse comes from something deep ... but then it's years of hard work, pain, and obstacles. A lot of it requires a tremendous amount of energy."

3. Think Independently—Especially When Others Don't

One of the most under appreciated leadership traits is the ability to resist consensus. Shapiro has seen firsthand how often organizations get this wrong, "Sometimes there's massive groupthink where people lead each other in a direction which doesn't exist." The implication is clear: independent thinking is not optional; it's a strategic edge.

4. Power in the Purpose

Lee Mandel, CEO of XSponse, who pioneered the new integrated AI-driven school safety system, believes this entrepreneurial mindset is about uniting and motivating people around a clear purpose that goes beyond simply focusing on profits. "I have seen firsthand how purpose motivates people to achieve the extraordinary," said Mandel. "Successful leaders bring talented people together behind a shared vision and inspire them through creativity, innovation, communication, and teamwork. When people believe in the mission and understand they are building something meaningful together, it creates the energy, focus, and accountability needed to accomplish the remarkable and make a lasting impact. At XSponse, that purpose is deeply personal and mission-driven: saving lives through school security technology, and that shared mission motivates the team every day."

Fred Laluyaux in conversation with Ray Wang, Founder and Chairman of Constellation Research, during the AeraHUB session “Beyond Buzzwords: Where Are Companies Getting Value with AI Today — and What’s Ahead?”



Improving decision making across a spectrum of industries

Fred Laluyaux — Co-Founder, President, and CEO of Aera Technology — shares the organization’s vision for people-guided decision intelligence and how it delivers that vision through real-time analytics, simulations, and actionable business recommendations.

Co-Founder, President, and CEO, Aera Technology



*The CEO Forum Group has selected Fred Laluyaux, Co-Founder, President & CEO, Aera Technology, as a recipient of the 2026 Transformative CEO Award in the exclusive category of **Decision Intelligence**, and has further recognized the organization as one of the Top 10 Businesses in America. This is bestowed for pioneering the concept of ‘the self-driving enterprise’ through cognitive automation and real-time decision-making at enterprise scale. As CEO, Laluyaux has built a category-defining company while fostering a culture of innovation, agility, and data-driven performance.*

Interviewed on December 16, 2025

Robert Reiss: You’ve talked about creating the “self-driving enterprise.” What does that mean?

Fred Laluyaux: We coined the term “self-driving enterprise” when we launched the company in 2017. It was an analogy to the self-driving car, which at the time was largely in prototype form. We envisioned enterprise technology that would be real-time and always on, connected inside and out, thinking, learning, and autonomous. We were ahead of the curve, but we knew this approach was the only viable way to address the fundamental problem of enterprise decision-making in an increasingly digital and complex world. A world where the volume, complexity, and speed of decisions would increase exponentially to a point where the traditional model of multi-layered pyramidal organizations, equipped with specialized tools on top of transactional systems, would simply break down.

Our vision was clear: evolve from people making and executing decisions supported by machines to machines making and executing decisions guided by people.

Fast forward to today, and you can see vehicles designed from the ground up for autonomy, with no steering wheel, no driver, and operating in a connected and intelligent network. What fascinated me most is that self-driving technology learns from every interaction across the entire fleet. These systems capture learning opportunities and redistribute that knowledge in near real time to all

vehicles. You leverage the exponential power of the entire fleet learning together with the machines, compounding improvement across every vehicle simultaneously.

That’s the analogy. We are redesigning the system entirely, building it from the ground up for a new era of enterprise operation.

Our customers across industries talk about levels of decision autonomy much like autonomous vehicle manufacturers describe theirs, from Level 1, decision support, to Level 5, fully autonomous, where humans supervise and govern the system. Self-driving car companies count miles driven; we count decisions augmented and automated. To date, we have executed more than 50 million decisions, and automation levels often exceed 90%.

“We coined the term ‘self-driving enterprise’ when we launched the company in 2017...We are redesigning the system entirely, building it from the ground up for a new era of enterprise operation.”

You were a pioneer of decision intelligence. Describe where the industry is today.

We launched Aera years before decision intelligence was formally recognized as an enterprise software category, and years before generative AI and large language models entered the mainstream. We were

“Organizations are becoming flatter, and technology stacks are simplifying, with decision intelligence sitting directly on top of transactional systems.”

convinced the future would require a fundamental operational shift, from people making every decision supported by software to machines executing decisions at scale, guided and governed by people. That conviction has proven correct.

Today, enterprises are no longer asking what decision intelligence is or why it matters — they’re asking how quickly they can adopt and scale it to deliver value. Industry research reflects that shift. A recent IDC study found that 88% of enterprises have either implemented or plan to pilot decision intelligence initiatives, with more than 40% citing rising operational costs and inefficiencies as key drivers.*

The technology is ready and deployed at scale across many industries, and its full impact is becoming quickly understood. New roles, such as Decision Architect and Decision Analyst, are now emerging on LinkedIn today. Organizations are becoming flatter, and technology stacks are simplifying, with decision intelligence sitting directly on top of transactional systems. The long-awaited delayering of organizations has already begun.

We often speak of “revolutions,” but I believe this one is real, and it will unfold faster than any disruption since the beginning of the industrial revolution.

Describe Aera Technology’s model and approach.

Aera is a Silicon Valley software company that has developed a leading AI solution for decision intelligence. Decision intelligence is the digitization, augmentation, and automation of the decisions you make every day to run your business, across supply chain, operations, marketing, sales, and more. Gartner predicts that by 2027, 50% of business decisions will be augmented or automated by AI agents for decision intelligence, and that by 2030, explicitly modeled business decisions will be five times more trusted and 80% faster than ungoverned

decisions enabled by decision intelligence platform adoption.** We led the creation of this new category when we launched in 2017, and our technology is recognized as the leader in this emerging field of AI, analytics, and automation.

In a nutshell, Aera is an AI agent that continuously analyzes your data in the context of your company and industry, delivering real-time analytics, simulations, and actionable business recommendations. For example: move inventory from one place to another, change a marketing promo, hold a purchase order, or switch a supplier. All of this works together to continuously optimize your plan, whether it’s financial or operational performance.

“Aera is an AI agent that continuously analyzes your data in the context of your company and industry, delivering real-time analytics, simulations, and actionable business recommendations.”

Zooming in more closely, Aera sits on top of your transactional systems. It automates and executes the majority of the recommendations it generates and proactively engages business users when their input is needed. It communicates in plain English, provides all the insights required to make a decision, and executes and memorizes those decisions. As a result, it not only ensures timely execution, but also captures the tribal knowledge and best practices that build up in a company over time.

That decision memory becomes the foundation for AI-based learning. Over time, decisions increase in accuracy and speed and expand across the value chain, breaking down all of the traditional data and functional silos.

Co-Founder, President, and CEO, Aera Technology

CEOs think in value. What's the ROI of decision intelligence?

This is the fundamental question: What is the value of a good decision?

What is the ROI of making faster and better decisions across your value chain? Improved forecast accuracy and service levels lead to market share gains. Process and waste optimization reduces costs, increases cash on hand, and improves working capital. Carbon footprint reduction improves as well. Customers have seen forecast accuracy increase by 15%, waste reduction of up to 20%, and similar gains in logistics efficiency.

In a 2023 Forbes article, Will Beery, CIO of Mars Wrigley, reported that after deploying Aera for

stock rebalancing and root cause analysis, truck utilization jumped from the mid-80% range to 95%, resulting in significant cost savings and a reduced carbon footprint. In a very different context, Western Governors University, the largest nonprofit, competency-based online higher education institution in the United States, saw an 8% improvement in student retention after deploying Aera.

ROI is realized across many dimensions. Every decision executed with Aera is tagged with context and an expected outcome. The metrics used to measure outcomes are automatically calculated for every decision. Every micro-decision can be tracked and analyzed in context, giving organizations a level of precision and accountability that was previously impossible.



*IDC White Paper, sponsored by Aera Technology, "Accelerating enterprise decision intelligence with AI agents," Doc #US53891725, November 2025.

**Gartner Magic Quadrant for Decision Intelligence Platforms, David Pidsley, Carlie Idoine, Gareth Herschel, Kevin Quinn, Kjell Carlsson, 26 January 2026.

The larger ROI comes from connecting dots that were previously unconnected, for example, linking a strategy to reduce raw material waste with demand creation in a single dynamic decision-making process. The value compounds over time. Most customers begin with one high-impact decision use case, what we call a skill, and once results are visible, they expand into adjacent decisions across functions and geographies. Because decision capabilities are composable and adaptable, organizations can continuously scale as conditions change and unlock incrementally more ROI.

“Because decision capabilities are composable and adaptable, organizations can continuously scale as conditions change and unlock incrementally more ROI.”

That’s possible because decisions themselves are digitized. Instead of executing every step manually,

teams supervise and guide the system as it runs continuously.

This is amazing. Could you share another concrete example?


Using Aera, Hershey is transforming its entire global supply chain by shifting to proactive decision orchestration across planning, inventory, and logistics. Aera continuously detects aging stock before expiration, rebalances supply and demand, automates routine planning decisions, and optimizes truckload utilization, enabling Hershey to act earlier and capitalize on opportunities before they become problems.

The project took 90 days from start to go-live. Within the first 90 days after going live, Hershey prevented approximately 200,000 cases of waste, the equivalent of 40 truckloads, saving \$5 million in six months, or \$10 million annualized. The company reduced excess inventory, improved cash flow, lowered costs, and decreased carbon emissions.

Beyond the metrics, Douglas Guilherme, Senior Vice President Global Supply Chain at The Hershey Company, described a fundamental mindset shift: “Instead of asking, ‘What happened and how do we fix it?’ teams are now asking, ‘What’s about to happen, and how do we prevent or capitalize on it?’ Decision intelligence is increasingly viewed as a trusted partner in decision-making, enabling faster, more confident action across the supply chain.”

How do you handle structured versus unstructured decisions?

Decisions come in different forms, and Aera is built to handle the full spectrum. Structured decisions, typically high-volume, rules-based, and time-sensitive, can be configured in Aera using deterministic logic, agentic logic, or a combination of both, and allowed to run continuously.



Fred Laluyaux (left) with Aera Co-Founder Shariq Mansoor celebrate Aera’s recognition in Gartner’s inaugural Magic Quadrant for Decision Intelligence Platforms, marking a defining moment in the evolution of decision intelligence as a core enterprise software category.

Co-Founder, President, and CEO, Aera Technology

For example, Avantor uses Aera to optimize and execute structured procurement and inventory decisions that occur daily at significant scale. As a leading global provider of mission-critical products and services to the life sciences and advanced technologies industries, Avantor operates a highly complex supply chain. Its global distribution network includes 40 facilities serving more than 300,000 customers across 180 ship-to countries, supporting nearly 6 million SKUs and processing over 10 million orders each year.

With decision intelligence, Avantor continuously monitors demand, utilization, and availability to sense risk early. It also generates decisions to rebalance inventory; reduce, cancel, or accelerate purchase orders; or adjust supplier commitments. These decisions follow clear business rules and constraints and run continuously as conditions change. When recommendations are approved, either automatically or manually, the platform executes the related actions and communicates with suppliers. This allows the company to prevent excess inventory before it enters the network, all while keeping people in control of oversight and exceptions.

That last point is key: this is human-guided automation. Teams review, modify, or approve recommendations, maintaining governance and accountability while eliminating low-value manual work. Within the first 4 to 8 weeks of go-live, Avantor began delivering meaningful financial and operational impact, including reductions in excess inventory and procurement-related waste, improved service levels, and lower transportation-related emissions. Decision intelligence also accelerated revenue realization, reduced supplier spend, and drove double-digit productivity gains for planning and supply chain teams, all supported by strong user adoption across decision workflows.

Jared Guckenberger, Vice President of Global Supply Chain at Avantor, recently shared, “Decision intelligence is one of the few technologies that

fundamentally changes how we work, moving us from reports and emails to operating decisions end-to-end in one place, with speed, scale, and accountability.”

One important nuance: Aera can also work with unstructured data to support both structured and situational decisions. A leading global beverage manufacturer uses Aera to ingest unstructured claims arriving in inconsistent formats, apply policy and financial logic, and recommend next-best actions, dramatically reducing cycle times while keeping human teams firmly in control of governance and escalation paths.

What should CEOs do now to prepare for agentic AI?

Agentic AI is already real and delivering results. It has matured beyond productivity and text-heavy tasks to become trustworthy enough to operate core business processes at scale.

The opportunity is that organizations can now modernize incrementally, scale autonomy responsibly, and incorporate innovation continuously. That is why we designed Aera to be composable and adaptable, so decision capabilities can evolve as technology advances, allowing companies to move at their own pace and expand as confidence grows.

My advice: pay close attention to this technology. It is not incremental. As a CEO, you must make “agentifying” your company a personal priority, as it impacts the entire business. Whatever the size of your company, assemble top talent and work directly with them and your leadership team on this initiative. Talk to your peers and remain decisively curious.

“As a CEO, you must make ‘agentifying’ your company a personal priority, as it impacts the entire business.”



Fred Laluyaux with Douglas Guilherme, Global Senior Vice President, Supply Chain, The Hershey Company, and Nitin Murali, Vice President, Supply Chain Excellence, Gallo, during an AeraHUB discussion on how leading global enterprises are using decision intelligence to drive resilience and operational excellence.

Where is this all going, and will machines replace humans?

We are moving toward enterprises that operate like self-driving systems, always on, continuously learning, and increasingly autonomous. The question is how quickly organizations will embrace this shift, and the leaders who move with conviction will define their industries.

The impact will be profound. Decision-making work will be digitized at scale. Organizations will become flatter and more fluid. The technology stack will simplify, with decision intelligence sitting directly between your transactional systems and your people. Machines will elevate human understanding and thinking. The best organizations will be those that most effectively combine human judgment and machine intelligence, with people focusing on strategy, creativity, and oversight while intelligent systems manage the operational complexity of running a global enterprise.

We coined the term self-driving enterprise in 2017. I believe we're at the moment when that vision is reality, at the heart of how the world's greatest enterprises operate. That is what energizes me every day in conversations with customers and fellow CEOs. The vision is becoming real, and the momentum is extraordinary.

You've mentioned transformative moments in your life. What were they?

I grew up in France, not in a tech family, and was fortunate to come to the United States for an internship with a technology company in my early twenties. Shortly after college, I launched my first startup to develop technology invented by engineers from MIT and Harvard. When I met them in Cambridge, near the MIT campus, I experienced a defining moment. The speed and ambition of that young team were transformative for me. Their fail-fast mentality was eye-opening. At that moment, I knew I had to build my career in the United States,

Co-Founder, President, and CEO, Aera Technology

particularly in Silicon Valley. It took a few years, but I eventually made that move.

The second moment came in 2010. After more than 10 years working on large enterprise analytics and modeling solutions, I realized the real opportunity was in making and executing decisions on top of complex ERP systems. The cloud revolution was democratizing access to data and markets, and yet decisions remained largely manual. The gap between insight and action was enormous.

My “aha” moment came when I realized that to continuously improve decision-making, a company had to record its decisions. That is what Google did to train its search engine. We needed to build new technology to apply that logic to enterprise decisions. That insight led to the vision of moving from people making decisions supported by machines to machines making and executing decisions guided by people. That vision became Aera.

How many decisions does a CEO make in a day?

It depends. In a startup or scale-up environment, a CEO touches many topics and may make or influence dozens of decisions daily. As the role evolves, decisions become more strategic and fewer in number.

“CEOs must implement decision systems that free teams from repetitive work while improving the accuracy and timeliness of decisions across the value chain.”

More importantly, CEOs must implement decision systems that free teams from repetitive work while improving the accuracy and timeliness of decisions across the value chain. They must create a new operating model — one in which intelligent systems manage complexity across the enterprise, and people focus on strategy, oversight, and continuous improvement.



Fred Laluyaux is Co-Founder, President, and CEO of Aera Technology, the leader in agentic decision intelligence and creator of Aera, the first decision intelligence agent. An entrepreneur and Silicon Valley veteran, Fred brings an impressive track record building successful startups and driving technology innovation.

Prior to launching Aera, Fred was the CEO of Anaplan, which he grew to a \$1 billion valuation. He has held several executive positions at SAP, Business Objects, and ALG Software. As a thought leader on the future of work and host of the Decision Intelligence podcast, Fred frequently shares his vision with influencers through media interviews and speaking engagements at industry conferences. His views have been published in business and trade publications. A technology and startup advisor, Fred is an investor and active board member of several startups in the U.S. and Europe.



Visit www.aeratechnology.com to learn more about Aera Technology.



Humanizing the delivery experience

Shipt CEO Kamau Witherspoon discusses how the same-day delivery company differentiates itself through genuine human relationships, why courageous thinking is the most important team quality, and how a personal family crisis reshaped his entire approach to leadership.



*The CEO Forum Group has selected Shipt and Kamau Witherspoon, CEO, as a recipient of the 2026 Transformative CEO Award in the exclusive category of **Human-Centered Commerce**. This recognition is bestowed for creating new value through a distinctive commerce model that leverages technology while preserving human connection as a competitive advantage, reflecting Kamau Witherspoon's leadership philosophy around culture, courage, people, and the role of human-centered service in an increasingly technology-driven environment.*

Interviewed on April 9, 2026

Robert Reiss: Describe the Shipt model.

Kamau Witherspoon: At our core, Shipt is a retail technology company. We develop technology that connects customers to retailers they love, while also helping drive growth for our retailers. We were founded in Birmingham, Alabama, in 2014. Then, in 2017, we were acquired by Target, which has been an incredible relationship for us. We operate independently as a wholly owned subsidiary, and that gives us a unique opportunity to support both Target and more than 100 retail partners across the country.

The business really has two major components. First is same-day delivery. Customers can use our app to shop for groceries and household essentials from retailers in their area, and then one of the shoppers who work on our platform fulfills that order in as little as an hour.

The second component is what we call delivery-only services. That's where we help Target move parcel deliveries faster and more efficiently than traditional alternatives.

But what truly differentiates us is the human element. We believe commerce is still fundamentally about relationships. Shoppers genuinely care about the customer experience. They communicate. They build trust. They pay attention to details. It creates strong loyalty for Shipt. By delivering a great experience for the shoppers and drivers who choose to work with us, we empower them to deliver a great experience for our members.

“What truly differentiates us is the human element....By delivering a great experience for the shoppers and drivers who choose to work with us, we empower them to deliver a great experience for our members.”

One thing people constantly say about Shipt is that your shoppers feel different. There's a warmth and humanity to the experience that people don't associate with other platforms. Why is that?

We intentionally built it that way. Shoppers are incredibly passionate about what they do. Many of them think of themselves as entrepreneurs. They think of the people they shop for as “their customers,” and that mindset matters.

When someone is selecting groceries for another family, that's personal. Picking produce matters. Making substitutions thoughtfully matters. Communicating during the shop matters.

We see our job as using technology to make that bond between shoppers and customers possible at scale. For example, our Preferred Shopper feature allows members to be paired with their favorite shopper, which creates a sense of trust and connection that brings peace of mind and makes life easier for everyone involved.

“I also shadow customer service agents every month. I literally put on the headset and listen to calls because that’s where you hear the places where the business can continue to improve.”

You’ve told me that in order for customers to have a great experience, your shoppers first need to have a great experience. Explain this philosophy.

I believe leadership starts with service. If I want our customers to have an exceptional experience, then those doing the work must feel supported, respected, and empowered first. That responsibility belongs to leadership.

That means understanding what their experience actually looks like—not from a spreadsheet, but from firsthand exposure. One of the first things I did when I became CEO was go through the onboarding process as a shopper myself. I downloaded the app, completed the training, and started claiming orders. I still go on shops and fill orders regularly today. Every time I do one, I learn something. It’s humbling, honestly. You realize how much trust our

customers place in us. You also learn where friction exists, what’s working, what’s not working, and what improvements matter most.

I also shadow customer service agents every month. I literally put on the headset and listen to calls because that’s where you hear the places where the business can continue to improve. Customers call when something didn’t go perfectly. Shoppers call when they need help. I never want to get too far removed from the actual experience of our customers and frontline teams.

That hands-on philosophy seems deeply connected to your leadership style. You have one of the most unusual and thoughtful leadership frameworks I’ve heard. Talk about the Kaleidoscope Award and the idea behind it.



To explain that, I have to go all the way back to college. I attended college on a Navy ROTC scholarship, and I knew I was going to become a Navy officer after graduation. During that period, I wanted to get a tattoo, but I spent a lot of time thinking carefully about what it should represent.

That process led me to Adinkra symbols from West Africa. One symbol in particular resonated deeply with me because it represented bravery, courage, fearlessness, and valor. That symbolism became important to me during my military service because courage is essential in leadership. But it also carried into my corporate career. Leadership requires courage too—the courage to speak up, make difficult decisions, challenge assumptions, and sometimes stand alone.

Years later, after spending time at Yum! Brands, where I saw an incredible recognition culture, I developed what we now call the Kaleidoscope Award at Shipt. It's literally a kaleidoscope mounted on a base engraved with that Adinkra symbol.

For me, the kaleidoscope represents possibility and optimism. When you hold it up to the light, you see all these colors, shapes, and patterns constantly evolving. It reminds me that the future is bright and dynamic if we have the courage to build it.

“For me, the kaleidoscope represents possibility and optimism....It reminds me that the future is bright and dynamic if we have the courage to build it.”

The award is given to team members who demonstrate bravery—people who speak up, challenge conventional thinking, push the business forward, or advocate for difficult but necessary decisions. What's important is that we don't only recognize outcomes. We recognize behaviors that



build stronger teams. Sometimes the bravest thing someone does is express the unpopular opinion that ultimately turns out to be the right one.

Great story. I remember when David Novak, the founder of Yum! Brands, was telling me how recognition is at the core of every great business, and how for his KFC team, the most sought-after award was the rubber chicken award. David has courage, and I see that in you, Kamau. Your emphasis on courage is rare in corporate America today. Most companies talk about performance metrics. Very few talk about bravery. Why is that so important to you?

Because growth requires discomfort. Transformation requires discomfort. If people are afraid to challenge assumptions, afraid to disagree, or afraid to take intelligent risks, then eventually the company stagnates.

I want our team at Shipt to understand that courageous thinking matters. We can disagree respectfully. We can challenge each other. We can evolve. The leaders who helped shape me throughout

Kamau Witherspoon



my career created environments where honesty and courage were valued, and I try to do the same.

You also had a deeply personal moment that transformed your leadership philosophy. Tell that story.

The single most transformative moment of my career was when my son, Grayson, was diagnosed with stage 3 neuroblastoma at six months old. It completely changed me.

Before that moment, I was operating in a very unhealthy way professionally. I thought I had to do everything myself. I was burning the candle at both ends. I wasn't giving my team enough autonomy because I felt like I needed to be involved in everything. Then suddenly, none of that mattered.

My wife and I were spending enormous amounts of time at the children's hospital. There were treatments, chemo appointments, and endless uncertainty. And during that period, my team stepped up in extraordinary ways. They carried the

business forward. They supported me. They showed compassion and ownership. They proved that talented people will rise to the occasion when you trust them.

That experience fundamentally changed how I lead. I learned that leadership is not about doing everything yourself. It's about building great teams, aligning around a vision, and trusting people to execute. I also learned the importance of being present for family.

Today I prioritize moments I once would have sacrificed for work—school events, sports, family time. Ironically, becoming more intentional about family actually made me a better leader.

“Becoming more intentional about family actually made me a better leader.”

Many CEOs eventually discover that focusing more on family makes them stronger leaders, not weaker ones. Why do you think that happens?

Because perspective changes everything. When you go through something difficult personally, you develop more empathy, more patience, and more gratitude. You realize that everyone is carrying something you may not fully see.

That awareness changes how you interact with people. You become more human as a leader. And I think people respond to authenticity. Teams respond to leaders who genuinely care about them as people, not just as employees.

You've also had hard jobs early in your career.

I call myself a “Target boomerang” because I started at Target, left, and returned before eventually making my way to Shipt. When I left Target to join Yum! Brands and work on KFC U.S., a lot of people thought I was crazy.

At the time, KFC had experienced nearly a decade of declining sales. It was viewed as an extremely difficult assignment. But I intentionally ran toward it because I believed difficult assignments accelerate growth. What made it even more meaningful is that I worked at KFC as a teenager. So there was this incredible full-circle moment where I returned years later to help lead a transformation of the business.

That experience taught me something critical: growth often lives inside the opportunities other people avoid. The hard jobs force you to problem-solve. They force you to develop resilience. They expose you to complexity. And when you succeed, people notice. I genuinely believe that experience helped prepare me for where I am today.

“Growth often lives inside the opportunities other people avoid. The hard jobs force you to problem-solve.”

Talk about the future of Shipt.

The future is incredibly bright. The retail landscape will continue evolving rapidly. Technology will continue advancing rapidly. AI will reshape many aspects of commerce. But through all of that, one thing will remain true: people still want human connection. And that’s our opportunity.

We believe the companies that win will be the companies that use technology to strengthen relationships. For us, that means continuing to empower the shoppers with Shipt, deepen customer trust, support our retail partners, and innovate responsibly. We’re still growing, evolving, and learning.

But I genuinely believe Shipt represents something important in modern business: the idea that technology and humanity are not opposing forces; when done correctly, they complement each other. And that’s exactly the future we’re building.



Kamau Witherspoon is the Chief Executive Officer of Shipt, where he leads the company's growth in retail technology and strategic partnerships. A purpose-driven leader, Kamau joined Shipt in 2022, bringing over 25 years of leadership experience across the retail, healthcare, and food service industries.

Previously, Kamau held prominent executive roles including Senior Vice President of Operations at Target, Chief Restaurant Excellence Officer at KFC US, and Senior Vice President of Operational Performance at UnitedHealthcare. He began his career proudly serving as a Lieutenant Commander in the United States Navy.

Kamau holds a B.A. from Morehouse College and an M.B.A. from Old Dominion University. A member of the Executive Leadership Council, he serves on the NNN REIT (NYSE: NNN) board of directors as well as several non-profit boards.





Turning oversized products into oversized growth

CEO Joshua Ketter shares how Spreetail helps brands selling heavy, bulky products dominate online marketplaces through smarter fulfillment, sharper content, and rigorous data.



The CEO Forum Group has selected Joshua Ketter, Global CEO, Spreetail, as a recipient of the 2026 Transformative CEO

*Award in the exclusive category of **Ecommerce Growth**, and has further recognized the organization as one of the Top 10 Businesses in America. This is bestowed for redefining how brands scale across modern commerce through logistics, technology, and marketplace expertise. As CEO, Ketter has built a high-performance culture of corporate athletes focused on speed, ownership, and operational excellence.*

Interviewed on August 21, 2025

Robert Reiss: Spreetail has a unique niche and business model. Tell us about it.

Joshua Ketter: We sit at the intersection of e-commerce growth, marketplace strategy, fulfillment, and brand building, but our sweet spot is really helping brands grow online, especially when they sell heavy, bulky, oversized products. We're a top-five seller across almost every major marketplace—Amazon, Walmart, Target—and we're number one on many of those as well.

What makes us different is that we're not just trying to move product. We're focused on growing brands in a very intentional way. In fact, I generally won't work with a company unless I believe we can grow that brand at least 30% to 40%. That's my minimum bar. In some cases, we've grown brands more than 100%.

I'd also say we're very brand-obsessed. And while we absolutely use data and technology to move faster and smarter, we're not trying to automate our way through partnerships. Every brand we work with has a dedicated team that actually knows their business—what they actually need, where their pain points are,

and how we can help them win not just operationally, but strategically. That combination of scale, data, and real accountability is what sets us apart.

“We're a top-five seller across almost every major marketplace—Amazon, Walmart, Target—and we're number one on many of those as well.”

I actually have never heard that concept: how can you know that you can grow a brand 30% to 40% or more?

I start with a pretty structured diagnostic process. We built an internal tool called Bullseye, and it allows me to analyze a company's existing business, SKU portfolio, and how they're currently performing online. I'm not guessing—I'm looking for very specific indicators that tell me whether there's real upside.

The first thing I look at is ship speed. In e-commerce, speed is one of the biggest drivers of conversion. Each day is worth 9-15% conversion gain. If I can materially improve how quickly a product gets to the customer, that alone will unlock growth.

Second, I look at content. Are they using the right keywords? Are they ranking? Is the product detail page actually telling a compelling story? Most brands underestimate how much content quality drives performance. When we run listings through our process, we find a 10-15% lift in conversions through key optimizations like A+ content, brand stories, optimization of main and secondary images, and optimizing copy with high performing keywords.

Third is advertising. Are they spending? Are they spending efficiently? Are they bidding on the right keywords? A lot of brands either underinvest or misallocate dollars.

And then I look at channel coverage. Are they even in the right places? Many brands are too narrow in where they sell. We operate across 20+ marketplaces globally, and sometimes just getting a product in front of more consumers creates meaningful growth.

When I see gaps across those areas, that's when I know there's a real opportunity to drive 30% to 40% or more.

When you're analyzing products, keywords, and positioning, is this more of a science or an art?

I always start with science. Most of what we do is rooted in data—understanding rankings, conversion rates, ship speeds, pricing dynamics. That gives you the foundation.

But there is absolutely an art to it, and that's where we differentiate. The art is in how you bring all of those pieces together. It's understanding the brand, the competitive set, and how the product shows up on what we call the digital shelf.

We go really deep, especially on top SKUs. We ask: who are you competing with? What actually makes your product different? And is that message coming through clearly?

I'll tell you, we've tested all the latest AI tools, and the honest truth is that they can't capture what makes a brand actually resonate. That's why we've built our own. We have proprietary tools—from AI-generated listings to brand scoring models to automated audits—purpose-built for marketplace ecommerce. The way I think about it: AI handles the speed and scale; our people bring the judgment. That combination is where the real art comes in.

What's an example?

I'll give you one that comes to mind—ChargePoint. They're a leading EV charging company. When we started working with them, they were doing about \$30 million a year on Amazon, but they weren't really growing. At the same time, the EV market itself was growing about 30%, so they were clearly underperforming.

The first thing we looked at was ship speed. We realized we could get them next-day delivery to about 80% of the country, which was a meaningful improvement.

Second, their pricing wasn't as competitive as it could be. Because we have a cost advantage in heavy bulky fulfillment, we were able to lower retail prices by around 5%.

Third, their advertising wasn't very strong. We stepped in and started investing significantly—up to \$200,000 a month—and aligned that with the overall P&L.

Fourth, we expanded them into new channels where they weren't present before—places like Best Buy and Amazon Canada.



And then the big one was inventory. They were out of stock a lot—20% to 25% of the time. Spreetail maintains a 97% in-stock rate across all brands we work with, and right now we're closer to 98%. That alone drives massive growth.

When you put all of that together, we started growing them 30% to 40%. And what's interesting is we did that even when the EV market stalled to essentially zero growth. They were already the number one player, and they still gained share. That's not easy to do.

Out of curiosity, consumers often see the exact same product online at different prices. Why does that happen?

That usually comes down to a lack of control from the brand. If you sell your product to a lot of distributors and don't have a clear strategy for how it should show up online, you end up with multiple sellers listing the same product.

Now you've got different prices, different ship speeds, different content—and it becomes chaos. On Amazon, especially, sellers can overwrite content, so you might have great images and descriptions one day, and then someone else jumps in with worse content the next.

It's actually a huge problem. It hurts your brand, it hurts your conversion, and it makes advertising almost impossible to do effectively because there's no consistency.

“We work with brands to create what I'd call e-control—making sure there's a clear strategy for pricing, content, and distribution so that you don't end up in that fragmented situation.”

So we work with brands to create what I'd call e-control—making sure there's a clear strategy for pricing, content, and distribution so that you don't end up in that fragmented situation.

What does a consumer actually respond to when they're shopping online, especially for large products?





If you think about how people shop on marketplaces, most of them are going to type in what they're looking for and then look at the top results. I'd say 80% of consumers don't go past the top 10 listings.

So what matters at that moment? There are really five key things: price, ship speed, the Prime badge, the title, and the image. That's what drives the click.

Once they click, now you're into the product detail page, and that's where they evaluate features, compare options, and decide whether it's worth the price.

So you've got two battles—you've got to win the click, and then you've got to win the conversion. And a lot of brands don't realize how important that first moment is. If you're not competitive on those key variables, you're not even in the game.

What are the best practices for inventory and supply chain if you want fast shipping and strong performance?

The honest answer is, if you can, work with someone like us who already has the scale. Because if you're trying to do this yourself, especially in heavy bulky, it's really hard.

You need a network—multiple fulfillment centers in the right locations. You need to place the right

inventory in the right nodes. And you need to do it in a way that's cost-effective.

You can't just air freight large items across the country—that's never going to be profitable. So it's really about planning and placement.

“There are really five key things: price, ship speed, the Prime badge, the title, and the image. That's what drives the click.”

If you don't have that infrastructure, it's extremely difficult to deliver one-day or two-day shipping consistently. That's why scale matters so much in this space.

Who is the ideal company to work with Spreetail?

We're pretty straightforward about this. If your product is over 20 pounds, or if any dimension is over 24 inches, that's right in our sweet spot. We can usually be about half the cost and twice as fast in terms of shipping, and we can drive 30% to 40% growth or more.

From a size perspective, we typically look for brands that are already doing at least \$5 million online. We're really good at helping companies scale from \$5 million to \$100 million.

If you're smaller than that, it's just harder for us to create the same level of impact.

Let's shift to leadership. You talk about the idea of a “corporate athlete.” What does that mean?

That concept came from reflecting on how performance works, both in sports and in business. If you look at professional sports decades ago, athletes weren't really taken care of. Over time, teams realized that if they wanted peak performance, they had to invest in their players—trainers, nutrition, recovery, psychology.

I think corporate America hasn't fully made that shift yet. We still treat people like commodities in many ways.

For a “corporate athlete” as we call people at Spreetail, your mind is your greatest asset—your judgment, your thinking, your decision-making. So, the question becomes: how do we support people so they can operate at their best?

For me, that starts with understanding what actually drives performance, and then building systems and incentives around that.

What's the most overlooked driver of performance—and how have you applied it inside your company?

Sleep. By far.

The data is very clear—sleep has a massive impact on cognitive function, decision-making, and overall performance. If you're getting even one hour less sleep, your executive function can drop by around 20%.

So we leaned into that. We rolled out WHOOP devices across the company to track sleep. We brought in experts to educate our team. And then we did something that's a little different—we incentivized it.

We run competitions, give away meaningful prizes, and celebrate people who improve their sleep. It sounds simple, but it's been incredibly powerful.

Corporate America used to celebrate people who didn't sleep—people who worked all night. But that's actually counterproductive.

Since we've focused on this, along with other initiatives, we've seen a significant improvement in our business performance. Our EBITDA has increased over 200% the last couple of years.

At the end of the day, if you take care of your people and help them perform at their best, the results follow.



Josh Ketter is the Global CEO of Spreetail, the leading ecommerce marketplace accelerator for brands and manufacturers of oversized products. Spreetail is a top 10 seller on Amazon, Walmart, Target+, and many others.

At Spreetail, he engineered a \$100M+ improvement to EBITDA within 12 months, as well as drove an 80%+ reduction in out of stocks, and an acceleration of growth by over 40% inside 6 months.

Since stepping into the CEO of North America and then the Global CEO role, Spreetail's Brand NPS scores improved to an industry leading 50+, demonstrating the success of his stated mission to make Spreetail the “Most Brand Centric Company in the World.”

Prior to Spreetail, Ketter spent 10+ years in leadership roles at Amazon and Target, supporting finance, supply chain, tech and merchandising teams. At Amazon, he oversaw their Fulfillment Cost, as well as their Technology costs and International Expansion roadmaps. At Target, he helped accelerate Target.com from \$1B to \$10B+, unlocking supply chain strategies for Ship from Store and overall Digital Profitability.





Ecommerce is complex. We handle the heavy lifting.

Spreetail buys your inventory, scales your channels, and handles fulfillment end-to-end - all under one roof.

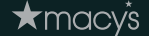
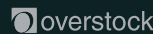
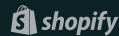
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AI In Insurance: Pay No Attention To The Man Behind The Curtain

By: Robert Reiss

The future of insurance may look a lot like *The Wizard of Oz*. Customers see the lights, and magic, but—what most companies hope is—not the machinery behind the curtain. As artificial intelligence becomes more embedded in insurance, the goal is not to make technology the star; the goal is to make the customer experience faster, more seamless, and more human.

AI will not replace the human side of insurance. Instead, the winners will be companies that use AI behind the scenes while keeping people, judgment, and trust at the center. Here are the three messages all industry executives should understand, as insurance impacts practically every vertical.

Insurance Must Move from Reactive to Preventive

For years, insurance has largely been reactive. Something happens, a claim is filed, and the company responds. But Martin Leitch, CEO of PURE Insurance, a specialty P&C insurer serving high net worth families, believes the industry's future depends on becoming far more proactive. "One of the big trends we're focused on is moving the industry from being very reactive—you show up when the

consumer needs you—to a proactive partnership model. If you get prevention and mitigation right, losses become less frequent and less severe, enabling more competitive premiums over time. That's the outcome we're working toward."

Being a state-regulated industry also presents unique constraints. Hamid Mirza, President US Retail Markets, Liberty Mutual, explains, "As volatility continues to reshape the homeowners market, success depends on precise risk understanding and the flexibility to deploy the right tools where they matter most. We're building a differentiated toolkit to compete and win market by market, while transforming how we operate to deliver stronger outcomes for our customers and our business."

Virgil Miller, President of Aflac, shares the same prevention mindset to healthcare, "If everyone can get on board with preventive care and getting a diagnosis earlier, that can help drive down overall healthcare costs." Miller wants Aflac to "be there when you need us most" by helping close gaps for consumers facing rising out-of-pocket expenses.

AI will Improve the Experience, not Remove the Human

AI will drive significant cost and efficiency improvements. But, while we can't see the man behind the curtain, it is essential that humans are in fact behind ... steering the application of AI.

An expert in AI, Ajay Pandita, Head, Financial Services, Fintech and Insurance at Cognizant, emphasizes, "AI is definitely going to change the world. But there are certain functions and activities that humans must do." He describes the ideal future as "human judgment and machine power" working together.

Miller agrees, especially when discussing claims. "AI can help expedite a claim, but what AI cannot do and should never do is deny a claim."

In moments like a cancer diagnosis, Miller says, "You want to talk to a human being," because compassion always is at the heart of the human and customer service connection.

Mirza focuses on how AI will change customer behavior: "Consumers have more choice than ever in how they choose to shop, and as some leverage AI to evaluate and compare carriers it will driver greater price transparency and raise the bar on the customer experience." Mirza points to Liberty's recently introduced conversational AI quoting app in ChatGPT as an example of adapting to changing consumer shopping preferences.

Leitch emphasizes AI's role in supporting employees. "The real opportunity is giving employees better information and tools so they can provide more value to consumers."

Pandita cautioned that companies are asking the wrong question when it comes to AI adoption. "Much of the conversation today remains focused on what we can automate with AI. That is not the right starting point. You have to look at the entire process and ask

how it should be fundamentally redefined. The most effective AI builders in insurance are thinking about customer experience, underwriting, and claims end to end, not simply where they can reduce costs. And there will always be a role for human judgment that the machine cannot replace. When you bring those two together responsibly, that is where you see the real outcomes."

The Future Belongs to Leaders Who Build Trust

Even with so much truth and hype about AI, winning in business comes down to strategy, leadership, and trust.

Mirza believes leadership requires reading the moment. "In high-stakes, uncertain situations, your job is to step in, be decisive, and absorb the uncertainty so your organization can move forward quickly. But in calmer times, the best thing you can do is get out of the way and let your team make the best decisions. And that only works if you've built an environment where people at every level from the front lines to senior leadership, feel not just empowered but genuinely expected to speak their minds. That's how you get an organization to be in service of the best answer."

Miller ties leadership directly to culture. "At the end of the day, everything we do is about our people. "First you focus on and do good with what you've been given, then make it better, and finally, be bold. And my team brings everything back to a set of core principles to serve the customer fairly and efficiently. All of employees and sales associates use their north star to make all business decisions."

Leitch showed what that looks like in service, as their customer retention rate is 96%. PURE's mission, he says, is "to create an experience so compelling that our members never want to leave." Monthly company-wide town hall meetings always include stories of remarkable service from around the organization.

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Connecting Consumers and Lawyers

Mehta interviews Hilton President
and CEO Christopher Nassetta



Innovating across industries and functions

Fast Company and Inc. CEO Stephanie Mehta explains why forward-looking insight has become essential for CEOs navigating rapid change, from AI-driven disruption to evolving competitive dynamics. Mehta also shares how Inc. and Fast Company equip decision-makers with early signals, practical lessons, and the clarity needed to lead.



The CEO Forum Group has selected Stephanie Mehta, CEO, Fast Company, as a recipient of the 2026 Transformative

*CEO Award in the exclusive category of **Media**, and has further recognized the organization as one of the Top 10 Businesses in America. This is bestowed for evolving a leading media platform that shapes the future of innovation and leadership. As CEO, Mehta has strengthened editorial influence and business performance while fostering a culture of creativity, relevance, and impact.*

Interviewed on March 25, 2025

Robert Reiss: Describe your role and your brands.

Stephanie Mehta: I'm the CEO and Chief Content Officer of Mansueto Ventures, which publishes both Inc. and Fast Company. At a high level, what makes us different is the lens we bring to business coverage—and the kind of reader we're trying to serve. Inc. is more than 40 years old and is the original chronicler of American entrepreneurship. It exists to empower and inspire founders and leaders of growth companies, especially in that high-energy phase where you're building, scaling, hiring, fundraising, and making real decisions with limited margin for error. Fast Company is nearing 30 years old and is unique in that it's dedicated to covering innovation in all its forms, primarily through the lens of business—though we also cover innovation in nonprofits, NGOs, and other institutions.

I've worked at The Wall Street Journal and Fortune, and I have tremendous respect for those publications—they're part of my daily media diet as a CEO. But I also think CEOs increasingly need to “look around corners,” and one of the best ways to understand the future of business is to understand

what entrepreneurs are building and what innovators are pushing into the world before it becomes obvious. That's where Inc. and Fast Company really live.

“CEOs increasingly need to ‘look around corners,’ and one of the best ways to understand the future of business is to understand what entrepreneurs are building and what innovators are pushing into the world before it becomes obvious. That's where Inc. and Fast Company really live.”

Explain why future-looking is so important right now.

The CEO mandate is shifting. Yes, leaders still need the core financial and geopolitical coverage from places like The Wall Street Journal, Financial Times, Fortune—those are vital. But more and more, leadership requires anticipation: what markets, technology, talent expectations, and customer behaviors will look like one, two, five, even ten years from now. And that's where publications like Inc. and Fast Company can be additive. We're consistently tracking the early signals—new business models, new ways of working, emerging categories, and founders who are building the next generation of companies. When you look back over time, the organizations that win are usually the ones that prepared earlier than everyone else. So, if you're a CEO and you're only consuming “what happened,” you're at risk of being surprised by “what's about to happen.” Our job is to give leaders a clearer view into that forward horizon.

Talk specifically about AI and how you think it will change business, the economy, and society.

That's a big question! AI will absolutely impact

Stephanie Mehta

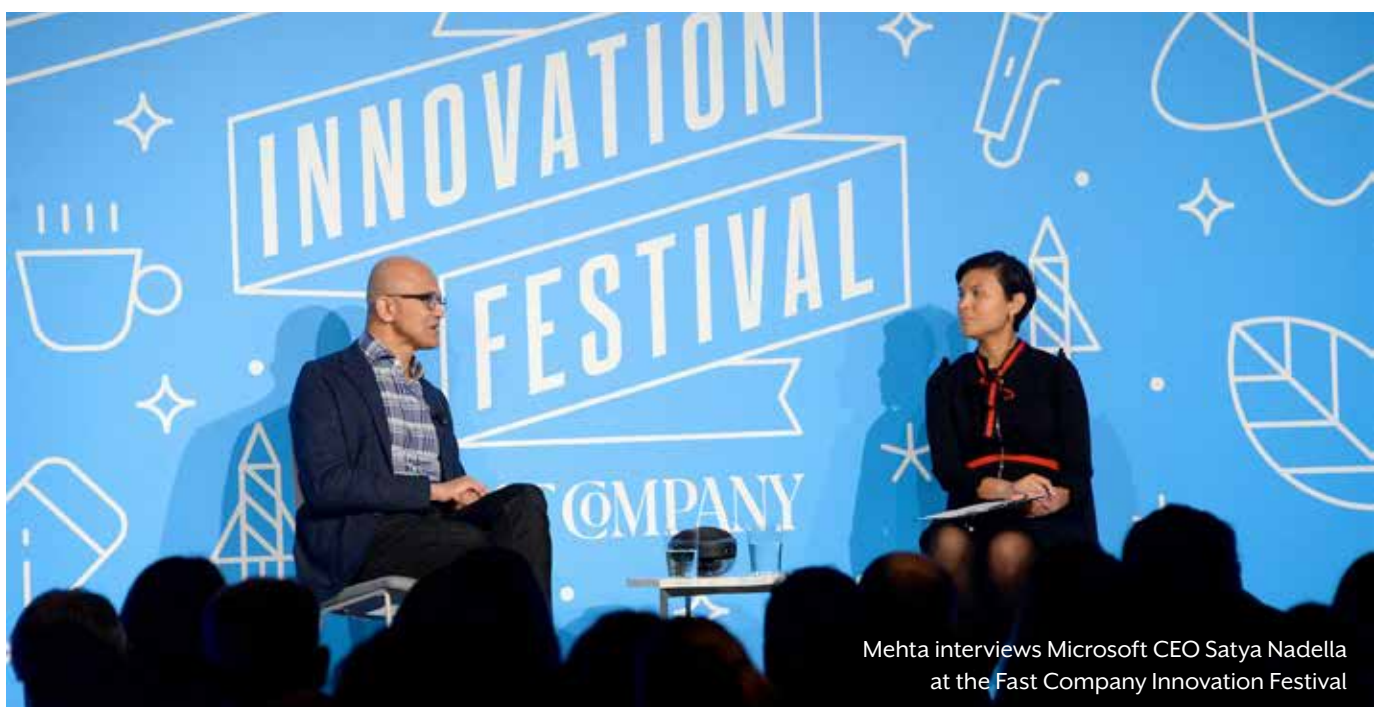
traditional employment. Before the AI boom, companies had started to automate tasks, and the rise of AI agents has accelerated that transformation; entire categories of employment will likely disappear, and people who previously were supervising, say, call centers or customer service reps, will orchestrate or manage bots. Smaller companies, meanwhile, will leverage AI to do work that they might have outsourced to say, branding agencies or accounting firms, which again, will impact those industries. And we're already seeing some growth companies say they'd like to attain unicorn status—a valuation of \$1 billion or more—with just two or three employees. That has implications for job creation in the U.S. economy. The bull case is that all those displaced employees will start their own companies and we'll see a blossoming of entrepreneurship; I'm more skeptical.

I do believe colleges and universities are very attuned to these changes, and they're trying to better understand the skills their graduates will need. There's a school of thought, one I'm clinging to, that suggests critical thinking skills and creativity will

be even more valuable in an AI-centric workplace because we'll need to constantly interrogate machine-generated work product.

Inc. has a legacy property CEOs talk about all the time—the Inc. 5000. Why does that list matter, and what does it reveal that CEOs can actually use?

The Inc. 5000 is the list of America's fastest-growing privately held companies, and it matters because it's a window into the next chapter of the economy. Over the years, the list surfaced companies that later became household names—Microsoft, Adobe, Chobani, Under Armour—before they were “obvious.” In other words, it helps leaders see who's gaining traction early. For CEOs, it's useful in a few ways. One, it gives you a practical view of what growth looks like right now—how companies are finding demand, acquiring customers, and building teams. Two, it helps you understand where competitive threats might emerge from—because disruption often comes from smaller, faster companies you weren't watching closely. And three, it's a reminder



Mehta interviews Microsoft CEO Satya Nadella at the Fast Company Innovation Festival

“Innovation can sometimes sound abstract, but we try to make it concrete through the stories we choose and the results we highlight.”

that today’s “early stage” can become tomorrow’s mainstream much faster than we think. If you want to understand who could be shaping your market—or joining the S&P or the Dow—years from now, it’s worth paying attention to what’s happening in that fast-growth private company ecosystem.

Fast Company has its own signature vantage point—innovation. How does that actually translate into value for a CEO who’s running a real business with real constraints?

Innovation can sometimes sound abstract, but we try to make it concrete through the stories we choose and the results we highlight. Fast Company covers innovation across industries and functions—product, design, technology, workplace, marketing, operations, social impact—because innovation isn’t just “R&D.” It’s how you build a better experience, how you differentiate, how you scale, and how you stay relevant.

One of the things CEOs often tell me is that they’re trying to understand not only what’s technically possible, but what’s culturally and commercially viable. Fast Company helps by surfacing organizations at that early inflection point—when a new approach is starting to work in the real world. Our Most Innovative Companies list is a good example: it regularly highlights companies that may be at the nascent stage of breakthrough today but are shaping how we work, how we move, how we consume information, and how we do business. For a CEO, that’s valuable because it can spark strategic questions: “Should we adopt that model?” “What would it take to build that capability?” “Is that a threat—or an opportunity for partnership?”

Over the next five years, what are the fundamentals CEOs may be underestimating—and what should they start doing now?

I think the pace of technological change—especially with AI—is still underappreciated at the top. I’ll be candid: I was initially skeptical about how quickly artificial intelligence would take root in corporate America, and I think we’re still early. But I do believe it’s going to be transformative, and the leaders who benefit most will be the ones who engage directly with the technology rather than treating it as something that only their team handles. Too many CEOs aren’t personally experimenting with AI tools, and I include myself in that—guilty as charged. But I’m developing a stronger thesis that leaders need first hand understanding: what it can do, what it can’t do, where it introduces risk, and where it creates leverage.

Beyond AI, I’d also say CEOs should prepare for an environment where differentiation is harder—because more skills and more information are becoming commodified. When everyone has access to similar tools, the question becomes: what is uniquely yours? That pushes leaders toward creativity, clarity of strategy, and culture—things that are harder to automate.

“When everyone has access to similar tools, the question becomes: what is uniquely yours? That pushes leaders toward creativity, clarity of strategy, and culture—things that are harder to automate.”

Every CEO wants to be covered positively. From your perspective, what makes a company or leader truly “newsworthy”—not PR-fluff, but something your editors actually want?

Stephanie Mehta

With former Fortune colleagues (from left) Michal Lev-Ram, Bethany McLean, Leigh Gallagher, Julia Boorstin, and Katrina Brooker



“It’s a bit paradoxical: CEOs have more channels than ever to tell their story, but many are more scripted and guarded than ever. When I encounter a leader who is unvarnished—who will talk plainly about challenges, trade-offs, mistakes, and what’s actually hard—that stands out immediately.”

The first thing is candor—being willing to say what you mean and say it honestly. It’s a bit paradoxical: CEOs have more channels than ever to tell their story, but many are more scripted and guarded than ever. When I encounter a leader who is unvarnished—who will talk plainly about challenges, trade-offs, mistakes, and what’s actually hard—that stands out immediately.

The second thing is specificity. Broad claims don’t travel as well as detailed examples. “We’re innovative” is less compelling than “Here is exactly what we changed, why we did it, what it cost, and what happened next.” And the third is real impact—proof points, outcomes, and lessons other leaders can learn from. Even in my Modern CEO newsletter work, I’m careful to fact-check and set expectations about what we’ll cover, yet it’s not unusual to have multiple communications professionals on calls. That creates an environment where authenticity is rarer than it should be—so when a leader brings it, it rises above the noise.

What kinds of stories and details are absolute “catnip” for your Inc. editors and readers?

Inc. is very service-oriented, and our readers are hungry for practical insight. They care about the journey as much as the destination: what steps did you take, what did you try, what worked, what failed, and how did you adjust? The best Inc. stories are loaded with concrete examples—how someone raised capital, how they marketed on a shoestring budget, how they hired early talent, how they navigated product-market fit, how they grew revenue without breaking culture, how they structured an exit. It’s not just inspiration; it’s usable information. And sometimes it takes a journalist to draw those details out—because a founder might not realize which “small” decision became a major turning point. But when you get that level of specificity, it’s core Inc. content, and it’s the kind of thing readers can’t easily get elsewhere.

What innovation is worthy of coverage in Fast Company?

On the Fast Company side, it’s less about “how-to” and more about demonstrating meaningful results—especially for recognition programs like Most Innovative Companies. For Fast Company we’re looking for evidence that innovation is creating a real-world effect: data, measurable outcomes, or compelling case studies that show impact in the marketplace or in society. That might be a product or service that changes behavior, a design approach that improves access or usability, a technology implementation that delivers major efficiency, or a business model that redefines a category. It’s not innovation for innovation’s sake. We want to understand: what changed, what improved, and why it matters. That’s why the best pitches—and the best stories—don’t just describe the idea, they demonstrate the results.

“For Fast Company we’re looking for evidence that innovation is creating a real-world effect: data, measurable outcomes, or compelling case studies that show impact in the marketplace or in society.”

You don’t just publish—you convene. Walk us through your communities, why you built them, and what they unlock that content alone can’t.

We really have three distinct communities. First, there’s the Inc. 5000 community, which is for honorees—fastest-growing privately held companies in America—often founders and CEOs, sometimes separate roles depending on the stage of the company. That community is powerful because it’s peer-to-peer at a very specific moment: scaling, hiring, and operationalizing growth.

Stephanie Mehta

“Each community connects to our mission: spotlighting the future, and creating spaces where leaders can exchange ideas that don’t fit neatly into traditional CEO-only forums.”

Second, there’s the Fast Company Impact Council, which is a mix of C-level executives who sit at the intersection of business and impact. They don’t have to be CEOs—it can include a chief design officer at a tech giant, a chief innovation officer at a healthcare company, or leaders from fast-growth firms. The point is that these executives rarely have a natural forum to talk to each other across disciplines, yet they’re the people driving innovation and societal impact inside organizations. We convene them—now

hundreds strong—and we have an annual meeting each spring. Last year, the theme was the intersection of AI and social impact: how do you use AI for good?

Third, there’s the Fast Company Executive Board, which a vetted, professional networking group whose members have the opportunity to publish opinion pieces and other content on our site. The group helps keep our newsrooms close to the next generation of business leadership. Each community connects to our mission: spotlighting the future, and creating spaces where leaders can exchange ideas that don’t fit neatly into traditional CEO-only forums.

Let’s land this in leadership. You’ve argued that creativity becomes even more essential as AI commodifies skills—and you even proved the “do hard things” thesis by running a marathon later in life. What’s your leadership philosophy, in a way a CEO can take home and apply?



Mehta interviews designer Rebecca Minkoff at Inc. Founders House

Two things anchor me. One is preparation and hard work. I'm a child of immigrants, and my parents really preached education, discipline, and effort. Early in my career—and now as a leader—I try to do my homework and come prepared. I'll be the first to admit I'm rarely the smartest person in the room, and I'm not always the best writer or speaker, but I can show up ready and willing to do the work. The marathon reinforced that, actually, because it reminded me that preparation has layers: I trained and did the long runs, but I didn't pay enough attention to nutrition and hydration—the full system required to succeed. I finished, but I was wrecked. It's a good metaphor for leadership: you can't just prepare for the obvious part; you have to prepare for the whole reality of the job.

“Early in my career—and now as a leader—I try to do my homework and come prepared. I'll be the first to admit I'm rarely the smartest person in the room, and I'm not always the best writer or speaker, but I can show up ready and willing to do the work.”

The second anchor is humility and stewardship. I had the honor of working with Carol Loomis at Fortune—she would remind people that it's a privilege to do what we do. For someone of her stature to say that left a deep imprint on me. I genuinely wake up believing it's a privilege to be a steward of two iconic brands. And I hope that mindset shows up in how I lead: respecting the responsibility, aiming for excellence, and staying grounded in the fact that the work matters—because it shapes how leaders think and how businesses evolve.



Stephanie Mehta is the CEO & Chief Content Officer of Mansueto Ventures, parent of Inc. and Fast Company. Previously, she served as editor-in-chief of Fast Company, overseeing its print, digital, and live journalism. Mehta has worked in senior editorial roles at Vanity Fair, Bloomberg Media, Fortune, and The Wall Street Journal.

Mehta is the recipient of the New York Women in Communications Matrix Award, and she sits on the boards of the American Society of Magazine Editors and Airbel, the research arm of the International Rescue Committee. She began her career as a business reporter at The Virginian-Pilot in Norfolk, Virginia.

She received a B.A. in English and an M.S. in journalism from Northwestern University. A Chicago-area native, she now splits her time between Essex, Conn., and Manhattan.

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Leading from the front lines

Steve Jones, CEO of Allied Universal, shares the leadership philosophy, AI-driven tools, and sports-inspired mindset behind one of the world's largest and fastest-growing security and facility services companies.



The CEO Forum Group has selected Steve Jones, Global Chairman and CEO, Allied Universal, as a Top 10 Business

*in America and for the 2026 Transformative CEO Award in the exclusive category of **Facility Services**. This is bestowed for redefining facility services through AI-driven innovation, including the LISA portal, elevating safety, security, and operational excellence worldwide. As CEO, Jones has advanced a differentiated culture of teamwork and accountability across 800,000 colleagues, integrating technology, intelligence, and human capital to deliver exceptional client service.*

Interviewed on March 20, 2026

Robert Reiss: Describe Allied Universal.

Steve Jones: Allied Universal is a global integrated security and facility services company. We combine great people, advanced technology, and specialized services to help clients protect their people, assets, and brands. We operate in more than 100 countries and territories, serve more than 400 Fortune 500 companies, and today our workforce is roughly 800,000 globally.

“I lead from the tip of the spear and don’t ask anyone to do anything that I wouldn’t do myself.”

How did you grow the company from 400 to 800,000 associates?

We did it with a clear game plan and relentless execution. We grew organically, promoted from within, and used disciplined acquisitions to expand our capabilities and reach. Just as important, we

spent as much time on integration and culture as we did on the transactions themselves. Over time, we acquired more than 110 companies, and the G4S acquisition was a major inflection point because it gave us the global footprint and operating depth our customers were asking for.

What is your leadership philosophy to manage and inspire such a large workforce and to get everyone on the same page?

My philosophy is simple: I lead from the tip of the spear and don’t ask anyone to do anything that I wouldn’t do myself. We put our people first so they can serve our clients best, keep the values clear, and execute as one team. At our size of 800,000 employees, alignment does not come from long speeches; it comes from a shared culture, empowered decision-making, accountability, and a real sense that everybody matters. I also believe strongly in a promote-from-within culture because when people can see a future for themselves inside the company, they buy into the mission at a deeper level.

“At our size of 800,000 employees, alignment does not come from long speeches; it comes from a shared culture, empowered decision-making, accountability, and a real sense that everybody matters.”

Do you have any unique practices as a CEO?

One important practice is that I believe in is being in the field, not just in the office. In a services business, you cannot lead from a spreadsheet alone; you need to stay close to the client and close to the front line. The other is that I like a very clear scoreboard: simple goals, visible metrics, and a written playbook for execution. When you scale a company, ambiguity is expensive.



“When you scale a company, ambiguity is expensive.”

You’ve used football and sports analogies throughout your career. Describe a sports principle that you really believe in and that other CEOs might be able to use in their organization.

The principle I believe in most is that there is no offseason. Winning is built in preparation, discipline,

and how you respond after adversity. Sports taught me hard work, dedication, commitment, humility in winning and losing, and resilience after setbacks. CEOs can use that same principle by building organizations that train continuously, review performance honestly and keep improving even when nobody is watching. In addition to no offseason, we also focus on understanding the value of locker room conversations so we can be open and honest with each other and the importance of watching the video to review how you performed.

“In addition to no offseason, we also focus on understanding the value of locker room conversations so we can be open and honest with each other and the importance of watching the video.”

Describe your vision for the role Allied Universal will ultimately play in redefining facility services.

My vision is for Allied Universal to help redefine facility services by turning it into a more integrated, strategic part of how organizations operate. The future is not about managing security, staffing, and support services in silos; it is about bringing them together to help create safer, smarter, and more efficient environments. I see Allied Universal leading that transformation by combining great people, strong service culture, and advanced technology to help clients improve resilience, elevate experience, and get more value from every facility they operate.

Why do you believe security has become one of the most critical infrastructures in America?

Security has become one of the most critical infrastructures in America because it enables everything else to work. It helps protect people, supports continuity, preserves trust, and helps organizations operate in an increasingly complex environment. Today, security is not just about guarding a location; it is about resilience, preparedness, crisis response, brand protection, and confidence. When security is strong, businesses can perform, communities can function, and people can feel safe enough to focus on what matters most.

“I believe security has become one of the most critical infrastructures in America because it enables everything else to work.”

How are technology and AI helping Allied Universal stay ahead of evolving security?

Technology and AI are helping us move from reactive security to predictive security. Our proprietary product, HELIAUS, uses AI to analyze data, improve deployment decisions, recommend actions, and help ensure officers are in the right place at the right time. Allied Universal client sites using HELIAUS average more than a 20% reduction in safety and security incidents. We are also using AI to strengthen the workforce side of the business. Our proprietary AI platform LISA (Live Interactive Support AI) automates scheduling using AI, which you can

“We are also using AI to strengthen the workforce side of the business: our proprietary AI platform... automates scheduling using AI, which you can imagine is significant for a workforce of 800,000.”



Steve Jones

“We chose to meet evolving risk with a broader platform that combines people, technology, consulting, and scale.”



imagine is significant for a workforce of 800,000, as well as manage call-offs, timekeeping, and other admin tasks, while our Mercury field communications platform improves communication, training, safety, compliance, and engagement with front-line professionals. In addition, AI is helping automate parts of recruiting and hiring, and onboarding.

What decision most transformed Allied Universal into the industry leader it is today?

If I had to pick one, it was the decision to build an integrated security company, not just a guarding company. The clearest expression of that strategy was the acquisition of G4S in 2021, which created a world-leading integrated security company and expanded our global reach in a major way. But the deeper decision was strategic: we chose to meet evolving risk with a broader platform that combines people, technology, consulting, and scale.

“We will keep expanding our services and geographic reach, but the mission stays the same: serve and help safeguard customers, communities, and people.”

What is the future of Allied Universal?

The future of Allied Universal is to keep building the world’s best services company by pairing exceptional people with better data, smarter technology, and deeper specialized expertise. We will keep expanding our services and geographic reach, but the mission stays the same: serve and help safeguard customers, communities, and people. I believe the future of this industry is integrated security, stronger cyber-physical awareness, and AI that makes human teams more effective, not less important.



Steve Jones is the global chairman and CEO of Allied Universal, the world’s leading security and facility services provider and a trusted partner to more than 400 Fortune 500 companies. Under his leadership, the company operates in more than 100 countries and has become the third-largest private employer in North America. Jones joined Universal Protection Services in 1996 and helped grow it from a \$12 million business into a \$23 billion enterprise through strategic expansion and acquisitions.

His leadership philosophy emphasizes operational excellence, workforce development and long-term client partnerships, and he has been recognized throughout the industry for building one of the most comprehensive security workforces in the world. Jones and his wife, Stacy, are dedicated philanthropists focused on combating human trafficking; their annual fundraiser has generated more than \$13 million for Vera’s Sanctuary. He also mentors students nationwide and holds degrees from Cal Poly San Luis Obispo and the University of Redlands. He is the author of *No Off Season*.





The Key To CEO Success... The Pivot!

By: Robert Reiss

Pivots are not something new; yet they are arguably the key to unlock the potential of our new world. In 1863 Cornelius Vanderbilt made one of the greatest business pivots by selling his vast shipping holdings to build a new railway empire. This not only helped him become one of the wealthiest men in history, but fostered the reinvention of a new nation.

In a world defined by accelerating disruption, AI, geopolitical shifts, and changing consumer expectations, the leaders pulling ahead are not those with the best long-term plans, but those who can continuously adapt without losing direction. If pivoting has always mattered, AI is making it unavoidable.

Matt Guffey, Chief Commercial and Strategy Officer at UPS, captures the magnitude of this shift, “In my 27 years, the accelerated pace of change we’re seeing today is unlike anything I’ve experienced before across technology, talent, culture, and how companies operate. The real challenge is how to successfully move fast and protect your culture. Enterprises must make sure to bring their people with them or they will be disrupted, instead of being the disruptor. The new leadership standard is not just to advance with speed, but to lead with intention.”

For Joseph Armas, President of Otis America, pivoting is not about abandoning the past, it’s about building on it. “If you think about our history, we’ve continuously innovated from manual elevators to autonomous systems, but always anchored in quality, safety, and reliability, because that trust is what allows us to pivot with confidence.” Armas then reinforces that pivoting is ultimately about relationships, “Most people think of us as an elevator company, but we’re really a relationship company, and understanding how our customers’ needs evolve is what drives how we pivot our business.”

Nate Rempe, CEO of Omaha Steaks, sees pivoting as a defining capability of enduring companies. He shares, “Pivoting is really how companies survive for 100-plus years, and if you don’t build that into your culture, you risk either moving too late or missing the opportunity entirely.” He discusses the context of what the true balance is, “Every organization sits somewhere on a comfort curve relative to change, and leaders have to understand that balance as too little movement creates stagnation, too much creates risk, and somewhere in the middle is where real pivoting happens.”

Adam von Gootkin, Founder of Highclere Castle Gin, emphasizes the discipline required to build enduring luxury brands: “In a world where trends constantly shift, it’s easy to chase every new opportunity, but the moment you lose sight of who you are, you risk losing the soul of the brand.” Von Gootkin, who also

founded House von Gootkin, the invitation-only members’ club which is among the most exclusive in the world, is known for curating immersive cultural, unbuyable experiences in rare, private locations. He applies the same philosophy to experiential luxury, “We pay close attention to the consumer and broader market signals,” he says, “but we expand only in ways that feel authentic to what we do exceptionally well.”

Brixton Albert, founder and CEO, quickly built Performance Golf into one of the largest online golf companies in the world through paid media and direct response. He shares how the real next level came from the pivot, which brought Performance Golf to become a true industry leader, “I realized while we were selling golfers great products, what they actually needed was a system. The golf industry has been drowning people in tips, drills, and conflicting advice for decades while every other sport moved to smart technology and wearables that actually guide you. And the data shows it. According to the USGA, the average golfer gets one shot worse after three years of playing. That’s why we built an AI-powered app at the center of everything we do that gives every golfer a personalized path, the right things, in the right order, built for their game.” Albert then summarizes one of the strategic keys to the pivot, “The hardest pivot isn’t when things are broken. It’s when they’re working and you choose to bet bigger.”

In summary, pivots are the key to success today. On April 4, 1962 the Beatles had the top five songs — 1. Can’t Buy Me Love 2. Twist and Shout 3. She Loves You 4. I Want to hold Your Hand 5. Please Please Me — and then instead of having a few years with more top success with their proven formula, they pivoted away and, in the process, created the new rock and roll. So, with our AI world, the pivot can be your most powerful tool; so, as the saying goes, get ready to pivot and let your business rock ‘n roll!



Redefining aging through dignity, choice, and respect

AARP CEO Dr. Myechia Minter-Jordan shares how bringing a physician's precision and a humanitarian's purpose allows one of America's most influential organizations to evolve beyond its legacy reputation to champion dignity, health, and financial security for Americans over 50.



The CEO Forum Group has selected Dr. Myechia Minter-Jordan, CEO, AARP, as a recipient of the 2026 Transformative

CEO Award in the exclusive category of Non-Profit, and has further recognized the organization as one of the Top 10 Businesses in America. This is bestowed for advancing the well-being of millions through advocacy, innovation, and societal impact. As CEO, Minter-Jordan has fostered a purpose-driven culture centered on inclusion, service, and meaningful change.

Interviewed on November 13, 2025

Robert Reiss: As CEO, how do you describe AARP to someone who may think they already know what it is?

Dr. Myechia Minter-Jordan: That's a great place to start. AARP is a nonprofit, nonpartisan membership organization focused on empowering people to choose how they live as they age. We represent more than 125 million people in the United States who are ages 50 and over, and we have nearly 39 million members.

At our core, we are about dignity, choice, and respect. Our work spans advocacy and public policy, research, community engagement, and innovation. We operate in every state and territory, working directly with communities to ensure that people are supported as they age.

We also work extensively with businesses and nonprofit partners to administer programs, and we have a strong foundation focused on lifting up lower-income older adults. In addition, we operate subsidiaries like Older Adults Technology Services and Wish of a Lifetime, which address connection, technology access, and purpose.

AARP is a complex organization, but fundamentally, our mission is simple: to help people live the life they choose as they age.

“AARP is a complex organization, but fundamentally, our mission is simple: to help people live the life they choose as they age.”

AARP has been around for decades. Can you share a bit about its origins and how that legacy still informs what you do today?

Absolutely. AARP was founded 67 years ago by Dr. Ethel Percy Andrus, a retired high school principal. She was deeply committed to ensuring that older adults could age with dignity.

The story that many people know is that Dr. Andrus discovered one of her former colleagues living in a chicken coop because they could not afford safe housing after retirement. She found that unacceptable, and she decided to do something about it.

That moment became the catalyst for AARP. From that very human beginning, we've grown into a national organization with global reach. But the core values remain the same. We are still focused on dignity, respect, and ensuring that no one is left behind as they age.

You're in a unique position because you're not only a CEO—you're also a physician. What advice do you have for Americans over 50 who want to live their healthiest lives?

One of the most important concepts I like to share is the difference between lifespan and healthspan. Lifespan is how long we live. Healthspan is how many of those years are lived in good health.

Dr. Myechia Minter-Jordan

“Lifespan is how long we live. Healthspan is how many of those years are lived in good health....There is currently about a 13-year gap between lifespan and healthspan.”

Right now, people are living longer than ever before. We have more individuals reaching 100 years and beyond. But our health is not keeping pace with that longevity. There is currently about a 13-year gap between lifespan and healthspan, and that gap represents years when people may be dealing with illness or disability.

Our goal should be to narrow that gap. At AARP, we focus on providing tools, education, and resources that help people stay healthier longer. That includes advocating for access to critical programs like Medicare, Medicaid, and Social Security, while also

helping people understand how lifestyle, prevention, and community support play a role in healthy aging.

We want people to live longer—but, more importantly, we want them to live better.

The population over 50 is growing rapidly. How does that demographic shift affect society and the workplace?

The shift is profound. By 2030, there will be more people over the age of 65 than under the age of 18 in the United States. We’re also seeing five generations



working side by side in the workplace for the first time in history.

That creates incredible opportunity. Older workers bring experience, perspective, and institutional knowledge that is invaluable. At AARP, we work with more than 300 companies to address age discrimination and to help employers better understand how to harness the power of a multigenerational workforce.

This isn't just about fairness—it's about economic strength and innovation.

“By 2030, there will be more people over the age of 65 than under the age of 18 in the United States. We're also seeing five generations working side by side in the workplace for the first time in history.”

AARP itself is now over 65 years old. How are you innovating to stay relevant for Gen X and Millennials?

This is something we think about constantly. We don't want people to reach 60 or 65 and suddenly realize they haven't prepared for retirement, caregiving, or financial security.

What we've learned is that we need to meet people where they are, during key life moments. One of the biggest areas of engagement for younger generations has been family caregiving. Many people in their 40s and early 50s are part of the “sandwich generation”—caring for children while also caring for aging parents.



That responsibility carries emotional and financial burdens, and we've focused heavily on providing resources, advocacy, and support for family caregivers. We've also partnered with organizations like United Way to expand access to local services through 2-1-1.

Also, we're deeply engaged in fraud prevention and scam education, which affects adults of all ages. And as Millennials begin turning 50 within the next few years, we're continuing to listen and adapt to what each generation needs.

“We're deeply engaged in fraud prevention and scam education.”

Dr. Myechia Minter-Jordan



AARP publishes the largest magazine in the United States. What's the secret to creating content at that scale that truly resonates?

The key is listening. We conduct extensive research to understand what matters most to our members and to Americans over 50 more broadly. Our content reflects the issues people are actually dealing with—scams and fraud, caregiving, Social Security, health, and financial security.

We don't guess. We study. And then we create content that is practical, relevant, and empowering.

One of my favorite stories is about a woman who read in our magazine that she could attend community college tuition-free after age 65. Because of that article, she went back to school and earned her degree. Those moments tell us we're making a real difference.

AARP is widely respected for its ability to bring people together across political lines. How do you achieve bipartisan impact in such a divided environment?

Our nonpartisan approach is foundational. We focus on representing the needs of people—not political parties.

We engage in extensive polling, surveys, and listening sessions across the country. We have offices in every state and more than 58,000 volunteers who help us stay connected to what people care about.

Issues like Social Security, Medicare, prescription drug costs, and family caregiving consistently receive bipartisan support because they affect real lives. We take what we hear from our members and bring those voices directly to policymakers.

We also empower our members to be advocates themselves. When proposed changes threatened Social Security, more than three million people took action through calls and emails. That collective voice matters.

How does your medical training influence the way you lead as a CEO?

Being a physician has deeply shaped how I think. As an internist, you're trained to listen carefully, assess symptoms, synthesize data, and prioritize actions—often under pressure.

I approach business challenges the same way. When presented with data or complex situations, I ask: What's most urgent? What causes the most harm? What's the best course of action?

“Our nonpartisan approach is foundational. We focus on representing the needs of people—not political parties.”



Dr. Myechia Minter-Jordan

“Being a physician has deeply shaped how I think. As an internist, you’re trained to listen carefully, assess symptoms, synthesize data, and prioritize actions—often under pressure. I approach business challenges the same way. When presented with data or complex situations, I ask: What’s most urgent? What causes the most harm? What’s the best course of action?”

There’s also the principle we learn early in medicine: first, do no harm. At AARP, that means always grounding decisions in our mission and in the well-being of the people we represent.

What ultimately brought you to AARP at this point in your career?

Every role I’ve held led me here. From practicing medicine at Johns Hopkins, to leading community health centers in Boston, to working nationally in philanthropy and health innovation, I’ve always focused on systems that serve people.

AARP takes a holistic view of well-being—what we call health, wealth, and self. It’s about physical health, financial security, purpose, and connection.



That alignment with my values made this role deeply meaningful.

I'm also inspired every day by my colleagues. This is a mission-driven organization filled with people who care deeply about making a difference.

Finally, health is the number-one concern for most people as they age. What is your vision for the future of health in America?

My vision for health in America is closely aligned with our vision at AARP: to transform the experience of aging.

That requires a multifaceted approach. We need accessible and equitable healthcare. We need policies that protect earned benefits like Social Security. We need to strengthen communities so people can live independently and stay connected.

“To transform the experience of aging... we need accessible and equitable healthcare. We need policies that protect earned benefits like Social Security. We need to strengthen communities so people can live independently and stay connected.”

Loneliness and isolation are serious health issues, and that's why we're investing in more than 1,000 age-friendly communities across the country. These efforts help ensure people can age safely, with dignity, and with meaningful connections.

If we do this well—together—we can create a future where aging is not feared, but embraced.



Dr. Myechia Minter-Jordan leads the world's largest nonprofit, nonpartisan membership organization representing nearly 125 million Americans who are 50-plus. Dr. Minter-Jordan is an accomplished physician and innovative leader who brings a passion for social impact and a demonstrated ability to make strategic decisions, foster collaboration and lead organizations through periods of rapid change and growth.

Throughout her career, she has shined a national spotlight on the importance of social equity and the far-reaching impact of philanthropy. Her journey to transform the healthcare industry includes a successful early career in academic medicine at Johns Hopkins and service as President and CEO of the Dimock Center, one of the largest community health centers in Massachusetts, and CareQuest Institute for Oral Health in Boston, MA.

A graduate of Brown University School of Medicine, Dr. Minter-Jordan takes pride in community engagement and serves on the boards of leading organizations and state advisory councils.





Disrupting the legal industry one connection at a time

Colleen Joyce, CEO of Lawyer.com, transformed a valuable domain name into a thriving national marketplace generating 60,000 client referrals monthly. She shares how customer-driven innovation, a startup mentality, and a commitment to value creation at every level of the ecosystem have fueled the company's remarkable growth.



*The CEO Forum Group has selected Lawyer.com and Colleen Joyce, Co-founder & CEO, as a recipient of the 2026 Transformative CEO Award in the exclusive category of **Marketplace Ecosystem**. This recognition is bestowed for creating new value by building a functioning marketplace ecosystem around a category-defining digital asset, integrating customer acquisition, intake, AI-enabled responsiveness, and operational infrastructure that is helping reinvent how law firms connect with and serve clients.*

Interviewed on May 21, 2026

Robert Reiss: You took a domain name and built a thriving business around it. What makes Lawyer.com more than a legal directory and why do you view it as a marketplace ecosystem?

Colleen Joyce: From the beginning, Lawyer.com was never about building a directory. It was about creating connection at scale. We saw consumers struggling to navigate the legal system and find trustworthy representation, while law firms were facing increasing competition for visibility and growth. That intersection became the foundation for what Lawyer.com is today: a marketplace—built to help both sides succeed. That’s how we think about Lawyer.com, not as a destination, but as the infrastructure powering the future growth of the legal industry.

A directory helps people find lawyers. A marketplace helps lawyers grow. That’s the difference. We’ve evolved from simply connecting consumers with attorneys to building an ecosystem that supports the entire growth journey—from visibility and client acquisition to intake, conversion, technology, and operational scale. Today, Lawyer.com generates more

than 60,000 client referrals every month, helping law firms nationwide connect with consumers across virtually every legal practice area. When you create value for consumers, law firms, and industry partners simultaneously, you create something far more powerful than a directory—you create an ecosystem. That’s the future we’re building at Lawyer.com.

“That intersection became the foundation for what Lawyer.com is today: a marketplace—built to help both sides succeed.”

Many companies start with a great idea. Few become sustainable, profitable businesses. What has been the biggest transformation under your leadership?

The biggest transformation has been taking what was essentially a powerful piece of digital real estate and turning it into a platform that delivers value every day. Lawyer.com gave us a unique opportunity, but opportunity alone doesn’t build a company—execution, innovation, and relentless focus on solving problems do.

When we started, we were a very small company, and one of our greatest advantages was our proximity to our customers. We weren’t making assumptions, we were listening. Attorneys told us what challenges they faced in attracting and converting clients, while consumers shared the very frustrations they experienced, trying to find real legal support. Those conversations became our roadmap.

We continuously tested new ideas, analyzed the data, listened closely to feedback, and refined our approach. That commitment to learning and adapting shaped the evolution of the business. Over time, consistent improvements compounded into meaningful growth.

“That commitment to learning and adapting shaped the evolution of the business.”

Looking back, there was no single breakthrough moment. The transformation came from years of disciplined execution, customer-driven innovation, and a relentless commitment to improving every aspect of the experience for both consumers and law firms.

Your own journey is remarkable. You started as an intern and eventually became CEO. How did that experience shape your leadership philosophy?

I think one of the greatest gifts of starting as an intern is that it forces you to earn your perspective. I wasn't hired to become a CEO, handed a leadership role or a blueprint for success. I learned by listening, asking questions, staying curious, and doing the work. Over time, that curiosity became expertise, that expertise created opportunities and what made the difference was my willingness to ask questions, stay curious, and immerse myself in the business.



I don't come from a legal background, and I'm not an attorney. In many ways, that became an advantage because it allowed me to approach problems through the lens of the customer rather than through industry assumptions. I had to learn the business from the ground up, which taught me the importance of staying close to the people who actually make the business work—our customers, our team, and the consumers we serve.

As a leader, I still try to carry that mindset with me. I don't believe CEOs can afford to become disconnected from their employees, their customers, or the day-to-day realities of the business. The best decisions are usually made by listening closely, asking the right questions, and surrounding yourself with people who bring different perspectives. Leadership isn't about having every answer. It's about building an environment where great people can find the answers together—and execute with focus.

“The best decisions are usually made by listening closely, asking the right questions, and surrounding yourself with people who bring different perspectives.”

What impact has Lawyer.com had on consumers seeking legal help?

One of the impacts I'm most proud of is that we've helped make legal help more accessible. The challenge is not just finding a lawyer, it's figuring out where to start. Our role has always been to simplify that process.

Most consumers don't wake up knowing how to find the right attorney, and there's an equally important gap in consumer education. Many people are encountering the legal system for the first time, often during stressful or high-stakes situations, and they're expected to make critical decisions without a

clear understanding of their options. By connecting consumers with qualified attorneys across all 50 states and virtually every area of consumer law, we've helped millions of people take the first step toward resolving important legal issues. Beyond access, we've also helped create greater transparency and confidence in the search process. Consumers today have more information, more choices, and more resources than ever before, allowing them to make more informed decisions about who they trust to represent them.

Ultimately, our success isn't measured by referrals alone. It's measured by the number of people who are able to find the legal help they need when they need it most. Every connection we facilitate represents a real person looking for answers, and that's a responsibility we take very seriously.

What has enabled Lawyer.com to scale when many marketplace businesses struggle to achieve sustainable growth?

The biggest differentiator for us has been recognizing that sustainable marketplaces are built on value creation, not just transactions.

We've also focused on creating value for every participant in the ecosystem. For consumers, that means helping them find legal help more easily. For law firms, it means helping them attract, convert, and retain clients more effectively. And for our partners, it means connecting them with firms actively investing in growth.

We've also been disciplined about listening to our customers and evolving alongside them. As law firms grew more sophisticated, their needs changed. They didn't just need leads—they needed better intake, better conversion, better technology, better data, and better ways to scale. Rather than staying in one lane, we expanded our platform to help solve those challenges.





competitive while many larger organizations have become slower and less adaptable.

Ultimately, what has enabled Lawyer.com to scale is our willingness to continually evolve while staying focused on the same core mission: helping consumers find legal help and helping law firms grow. The technology changes, the market changes, but that mission remains constant.

Artificial intelligence is changing every industry. How is it transforming your business and the broader legal marketplace?

AI is one of the most transformative technologies our industry has seen in decades. We're still in the early innings, but it's already changing how consumers access information, how law firms operate, and how legal services are delivered.



From a consumer perspective, AI is helping close a long-standing education gap. Historically, people facing a legal issue often didn't know where to start, what their options were, or even what questions to ask. Today, AI gives consumers the ability to educate themselves, understand legal terminology, and become more informed before they ever speak with an attorney. That leads to better conversations and ultimately better outcomes.

For law firms, AI is creating opportunities to drive efficiency and scale in ways that weren't possible before. Tasks that once required significant time and resources—from intake and client communication to content creation, research, and operational workflows—can now be enhanced through automation and intelligent systems. The firms that embrace these tools thoughtfully will be able to serve more clients, operate more efficiently, and make better decisions.

At Lawyer.com, we're integrating AI throughout our business. We're building AI-powered marketing agents, automating internal workflows, enhancing

Another factor is that we've maintained a startup mentality. Even as we've grown, we continue to operate with urgency. We move quickly, we experiment, and we aren't afraid to try new things. I believe that mindset has helped us remain

consumer experiences, and leveraging data to help law firms improve acquisition and conversion. But what excites me most isn't simply doing things faster—it's creating entirely new ways to deliver value.

The pace of innovation is remarkable. I often joke that every morning I wake up feeling slightly behind because the technology is evolving so quickly. But I don't think leaders have the luxury of sitting on the sidelines. Every major technological shift creates winners and losers. The organizations that stay curious, continue learning, and adapt fastest will be the ones that define the future of the legal industry.

“The organizations that stay curious, continue learning, and adapt fastest will be the ones that define the future of the legal industry.”

You've been a strong advocate for culture and collaboration. Why has that been so important to your success?

Culture is one of the few competitive advantages that can't easily be copied. Technology evolves, products change, and markets shift, but a strong culture endures.

I've always believed that great businesses are built through collaboration. While we have a headquarters in New Jersey, I view time together as an opportunity rather than an obligation. Some of our best ideas come from impromptu conversations, and many of our most important decisions happen when people can solve challenges together in real time.

We work hard, but we also believe work should be engaging and rewarding. We celebrate wins, encourage open communication, and create opportunities for our team to connect and contribute. Whether through company-wide initiatives, team activities, or simply fostering an environment where



ideas are welcomed, we're intentional about building a sense of community.

At the end of the day, culture isn't just about employee satisfaction—it's about performance. When people feel connected to the mission, valued by their colleagues, and invested in the outcome, they do their best work. That's been a major driver of our growth and success.

Was there a defining moment that changed the trajectory of your leadership?

Absolutely. For a long time, my focus was almost entirely internal. I was deep in the business, building the product, improving operations, solving problems, and making sure the company could execute. At that stage, that level of focus was necessary.

But as the business evolved, so did my role as a leader. I realized that leadership could not only be about what was happening inside the company. It also had to include the relationships, partnerships, and conversations happening outside of it.

That shift changed a lot for me. When I became more intentional about engaging with the broader business and legal community, I started to see opportunities differently. Partnerships came through relationships. New ideas came through conversations. Growth came from being in the right rooms with the right people.

Colleen Joyce



It taught me that building a company requires more than execution. It requires connection, visibility, and community. It also reinforced the importance of having your boots on the ground and maintaining a pulse on what's happening across the industry. Markets evolve, consumer behavior changes, new technologies emerge, and the leaders who stay connected to those conversations are often the first to identify opportunities—and the first to adapt when change arrives. As a leader, part of the job is not just managing the business you have today, but creating the relationships, opportunities, and vision that shape the business you'll lead tomorrow.

What do you believe is the secret to your significant success?

The “secret” is that we’ve never treated success as a fixed destination. We’ve grown because we’ve stayed focused on creating measurable value, while also staying adaptable enough to evolve as the market changes.

At Lawyer.com, value has to exist across the entire ecosystem. Consumers need better access to legal information and representation. Attorneys need opportunities to connect with clients and grow their practices. Our employees need meaningful work inside a mission-driven company. And our partners need to be part of something that is continuing to move the industry forward.

That balance is what has allowed us to scale. Today, generating approximately 60,000 client referrals every month means we are helping thousands of people take meaningful steps toward solving important legal challenges. But scale alone is not the goal. The goal is to keep improving the quality, efficiency, and impact of those connections.

A big part of our success has also been our willingness to adapt. The legal marketplace has changed dramatically, and companies that stay comfortable get left behind. We’ve continued to invest in AI, technology, better matching capabilities, intake solutions, and new tools that help attorneys operate and grow more effectively.

Looking back, transformation has defined my entire journey—from intern to CEO, from directory to national marketplace, and from simple client connection to a broader growth ecosystem. But the transformation I’m most proud of is cultural. We’ve built a company that keeps learning, keeps innovating, and keeps looking ahead.

To me, lasting success comes from combining execution with curiosity. You have to deliver value today while staying forward-thinking enough to build for a greater tomorrow.



Colleen Joyce is the Co-Founder and CEO of Lawyer.com and founder of the Lawyer Growth Summit. Colleen transformed a simple idea into an 8-figure legal powerhouse. A recognized voice in legal marketing and technology, she champions innovation that helps lawyers grow smarter and faster while building communities of attorneys, thought leaders, and industry experts.

Known for spotting opportunities ahead of the curve and forging impactful partnerships, Colleen's mission is to equip lawyers with the tools, knowledge, and connections they need to thrive in a rapidly evolving industry.

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TED TALK, Dubai 2025

Transforming a brand into a strategic powerhouse

Build-A-Bear CEO Sharon Price John breaks down the strategic thinking behind the company's remarkable resurgence, from redefining its addressable market to building partnerships that pass a rigorous three-part test.



The CEO Forum Group has selected Sharon Price John, CEO, Build-A-Bear Workshop, as a recipient of the 2026

*Transformative CEO Award in the exclusive category of **Experiential Retail**, and has further recognized the organization as one of the Top 10 Businesses in America. This is bestowed for reinventing retail through immersive brand experiences and emotional customer connection, as well as the strategy to expand the brand significantly with new demographics and partnerships. As CEO, John has led a successful transformation while fostering a culture of creativity, engagement, and significant growth.*

Interviewed on March 18, 2026

Robert Reiss: Describe what is unique about the Build-A-Bear Workshop business.

Sharon Price John: What makes Build-A-Bear truly unique is that we don't just sell products—we create emotional, personalized experiences. Guests take part in a hands-on process of stuffing, dressing, accessorizing, and naming their furry friend, all accentuated by our now-iconic heart ceremony, delivered in a one-of-a-kind way by our store associates, affectionately known as bear-builders. That moment of connection—between the guest, the gift, and the occasion—is the foundation of our brand and creates extraordinary emotional equity.

Positioned at the intersection of powerful cultural trends including personalization, kidulting, crafting, experiences, and plush itself, Build-A-Bear has expanded well beyond its original focus on children to become a truly multi-generational brand. That fandom is often amplified through enduring, deeply integrated partnerships with best-in-class entertainment IP and collectible characters, allowing

us to stay culturally relevant while remaining authentically ourselves.

“Build-A-Bear has expanded well beyond its original focus on children to become a truly multi-generational brand. That fandom is often amplified through enduring, deeply integrated partnerships with best-in-class entertainment IP and collectible characters, allowing us to stay culturally relevant while remaining authentically ourselves.”

In your book *Stories & Heart*, you write about leading with purpose and narrative. How did those principles translate into concrete strategic moves that ultimately drove Build-A-Bear's dramatic stock price growth?

Purpose and narrative aren't abstract concepts—they're decision-making tools. We used them to clarify who we were building for, why our brand mattered, and where we should focus our energy. That clarity allowed us to make bold but intentional moves: redefining our brand, expanding our addressable market, investing in partnerships and IP that aligned with our values, and saying no to things that didn't. Over time, that consistency built trust—with guests, associates, and ultimately, investors.

Build-A-Bear's stock performance has significantly outpaced expectations in recent years. What was the single strategic decision that, in hindsight, most directly changed the company's financial trajectory?

If I had to point to one inflection point, it was the decision to fully embrace Build-A-Bear as a brand rather than just a retail format. Once we shifted our



Women in Retail Leadership Forum; Keynote address 2025

mindset from stores that sell plush to a brand that creates moments across experiences, IP, channels, and platforms, the opportunities expanded dramatically—and so did our growth potential.

Your partnerships—from entertainment IP to digital platforms—now seem inevitable. What partnership decision faced the most internal skepticism at the time, and how did you know it was right?

Any time you stretch a beloved brand into new spaces, there's healthy skepticism—and that's a good thing. The key for me was always asking whether a partnership deepened emotional connection and felt authentic to who we are. When the answer was yes,

“The key for me was always asking whether a partnership deepened emotional connection and felt authentic to who we are. When the answer was yes, even if it felt unconventional at the time, I trusted that instinct.”

even if it felt unconventional at the time, I trusted that instinct.

Many CEOs treat partnerships as adjacent to core strategy. You've made them central. What criteria must be true before you say yes—and what makes you walk away?

A partnership has to pass three tests. It must be brand-additive, create meaningful value for the guest, and make economic sense. If any one of those is missing, we walk away.

As Build-A-Bear's results improved, investor perception shifted dramatically. What did you have to change—not in the business—but in how you communicated the strategy to Wall Street?

We had to tell a clearer, more confident story about how our strategy worked and why it was sustainable. That meant translating emotional brand strength into understandable economic drivers—margin expansion, capital efficiency, diversified revenue streams—without losing the heart of the story. Once investors could see both, perception followed performance.

Looking across retail transformation, IP expansion, and digital engagement, what is the unifying strategic thesis that ties all of these moves together?

It all comes back to leveraging the strength of our emotional connection with guests and extending

CEO, Build-A-Bear Workshop

“More than a third of our sales are tied to parties and birthdays, reinforcing Build-A-Bear as a destination for life’s meaningful moments.”

it thoughtfully across channels, categories, and geographies. Our unique retail experience, high awareness, and deep affinity enabled us to grow to more than 650 locations across over 30 countries, while strategically integrating buildabear.com to drive incremental transactions and help guests plan store visits and celebrations.

More than a third of our sales are tied to parties and birthdays, reinforcing Build-A-Bear as a destination for life’s meaningful moments. That same brand halo has created opportunities to extend into pre-stuffed plush beyond The Workshop, expanded gifting solutions, outbound licensing in non-plush



Toy of the Year Awards;
New York 2025



Toy Fair Grand
Opening, as Chair of
the Toy Association
Board; New York 2025



Interviewing Build-A-Bear founder Maxine Clark at film premier of company documentary, UNSTUFFED; St. Louis 2023



Signing copies of *Stories & Heart: Unlock the Power of Personal Stories to Live a Life You Love*; Forbes Publishing 2022

categories, and original storytelling through Build-A-Bear Entertainment, LLC—all grounded in our brand platform, “The Stuff You Love.”

Critics often assume emotionally driven brands sacrifice operational rigor. What systems or disciplines did you put in place to ensure heart never came at the expense of margin or execution?

Heart and rigor are not opposites—they reinforce each other. We invested in data, operational discipline, and talent while empowering teams with a clear sense of purpose. When people understand why the work matters, execution improves.

“Timing matters, but preparation determines whether you can seize the moment.”

When people look at Build-A-Bear’s resurgence, how much of success is timing—and how much is preparation?

Timing matters, but preparation determines whether you can seize the moment. We spent years building the brand, culture, and capabilities so that when consumer behavior shifted toward personalization and emotional connection, we were ready.

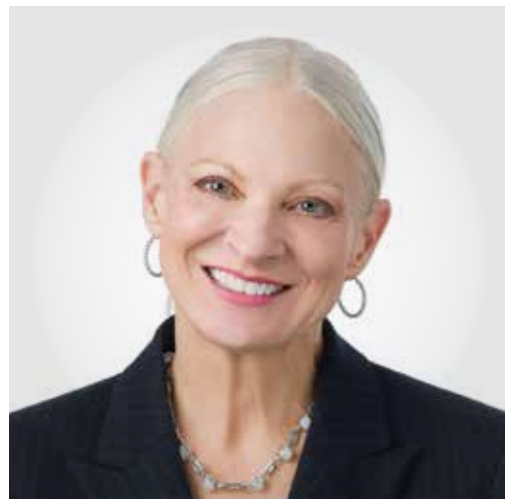
How do you decide where to double down versus where to divest attention?

We focus on where we’re creating the greatest emotional and economic return—and whether that will remain true over time. Focus is a leadership choice.

“Focus is a leadership choice.”

If you were to write the next chapter of Stories & Heart today, what leadership lesson would only be possible now?

I would write about the courage to lead with belief before proof. When you’re building something meaningful, the data often lags conviction. Staying true to purpose, paired with disciplined execution, can ultimately earn both hearts and market confidence.



Sharon Price John has served as president and CEO of Build-A-Bear Workshop, Inc. since 2013, leading the global brand—often credited as an early pioneer of experiential retail—through a decade of transformation. During her tenure, she diversified the business model to improve results and enhance shareholder value by broadening the consumer base beyond kids, expanding beyond malls, accelerating e-commerce, and extending into entertainment. She has delivered some of the company’s most profitable years while staying true to its mission of “adding a little more heart to life.” Ms. John will retire as CEO in June 2026 and remain on the Build-A-Bear Board of Directors.

Before Build-A-Bear, Ms. John built 30+ years of leadership experience across iconic children’s and entertainment brands as a turnaround and change agent, including leading the Stride Rite Children’s Group (Wolverine Worldwide), holding senior roles at Hasbro, as well as positions at Mattel, VTech Toys, and DDB/Needham Worldwide. Ms. John holds an MBA from Columbia University and a BS from the University of Tennessee, Knoxville.





In an AI World the Future Belongs to Human-Centered Leaders

By: Robert Reiss

Steve Jobs viewed technology as a “bicycle for the mind”, where it expands the human capability. This is precisely what AI is doing, but at a stronger rate than even perhaps Steve Jobs would have imagined. As AI reshapes how work gets done, the most important leadership question is not what technology can do; it’s what leaders choose to prioritize. Across industries, a clear pattern is emerging: the organizations navigating this moment best are not those chasing the latest tools, but those doubling down on people, values, and clarity of purpose.

Shawn Gulyas, CEO of humanworks8, the visionary architect of the next generation of workplace culture practices and the Moments that Matter leadership philosophy frames it simply: “The best companies are thinking strategically then acting with intention to transform their world of work in this AI world. Ultimately, better humans will make better AI.” That principle is echoed by leaders operating at global scale.

The Intersection Human Centered Leadership

Few leaders embody this balance better than Steve Jones, global chairman and CEO of Allied Universal. He grew the company from \$12 million revenue with 400 employees to \$23 billion revenue with 800,000 employees making it the 3rd largest private employer in America.

His leadership philosophy seamlessly blends the team-first mindset he developed as a college football player, which he used to lead his team to successfully develop advanced AI technologies. He shares, “My management philosophy has always been simple: great teams win. I believe that success comes from preparation, discipline, resilience, and putting the team ahead of yourself. I’ve always tried to lead from the tip of the spear, never asking anyone to do something I wouldn’t do myself. At Allied Universal, that mindset starts with our people, but it also means embracing the most advanced AI and other

technologies to give our teams better insight, greater agility, and stronger performance. When you bring together dedicated people, accountable leadership, and innovation that makes the team better, you create an organization built to adapt, improve, and win every day.”

He goes on to explain how he builds the most advanced AI into the Allied Universal business model, “Allied Universal’s AI-Powered Service Platform improves operational efficiency by simplifying the work that surrounds delivery of our core services which helps our teams stay focused on what matters most. From recruiting, hiring, and onboarding to scheduling, call-off management, and ongoing workforce support, it helps us move faster, make better decisions, and create a stronger employee experience. It also keeps our security professionals better connected in the field, which strengthens consistency, responsiveness, and performance across the business. That’s how we believe AI should work — not as a replacement for people, but as a tool that helps great people perform at an even higher level.”

Jessica Lee, Global Officer of Talent Acquisition & Associate Development at Marriott International, emphasizes that technology must enhance—not replace—human connection, “Tech and AI for us are tools to create more capacity for human connection and absolutely not to replace it.” She reinforces the shift leaders must make, “The question is not what should we automate, but what work truly matters? It’s really easy to fall into the trap of the shiny object.”

Leadership Principles as the Anchor in Constant Change

Farooq Kathwari, who is one of the few CEOs who has led an industry for over 35 years as Chairman, CEO & President of Ethan Allen brings a long-term perspective shaped by decades of leadership, “We established our Leadership Principles several decades ago yet it feels like yesterday. Our core principles focus on ten basic leadership principles that define our commitment to excellence.”

When I asked how he brings these to life, he explained, “On a weekly basis about 40 of our leaders forward to me brief overview on five key areas of focus: Talent, Marketing, Service, Technology, Social Responsibility. And this way we truly live the leadership principles as our north star, and additionally we inspire others to do the same. We have been doing this practice for years and it keeps us all focused on doing the right thing.” Kathwari further explains the value of this in our new world of AI, “If you don’t bring in technology, you’re not going to be around. Technology and personal service—when you combine those, that is the future. So, our foundation is knowing the more things change through AI, the more important it is to stay true to ourselves and live and work by our leadership principles.”

The New Leadership Mandate

Mike Dobbins, CEO of Alliant Credit Union—the only fully digital, national, credit union—shares perspective on how a digital model actually relies on human centered leadership, “Technology is changing rapidly and AI will be a critical enabler to better understanding members and delivering more compelling and emotive experiences. But it will be our people leveraging these tools that define what “wow” looks like across our many member journeys, driving impact and doing it much faster through technology.”

AI will continue to evolve. Tools will improve. Processes will change. Gulyas explains his vision of the future enterprise, “Successful organizations and people leaders will become laser focused on the small moments of human interaction and connection that build those invisible, yet essential, bonds of cultural trust. Highly effective organizations and leaders will understand people across all three parts of their mind — cognitively, affectively, and conatively — something AI will never truly understand. This means your investment in understanding and developing people, should, at the very least, be equal to your investment in AI.”



THE TRANSFORMATIVE CEO SUMMIT

Visionary leaders from diverse industries gathered to explore innovative strategies for transformation and growth. In this section, we share keynote speeches and summarize the pivotal findings and actionable insights that emerged from the breakout sessions.

The 5th Annual Transformative CEO Healthcare Summit: December 11, 2025

HEALTHCARE: THE NEXT DECADE

Part A: 11–11:30 a.m. ET

WELCOME & OPENING SPEAKERS

Opening presentations set the stage for our CEO problem-solving work groups.



“A New Collaborative Model for the Future of Healthcare in America”

Colleen Lindholz

President, Kroger Health
(The Kroger Company)



“The Secret of Driving a Beloved Brand”

Angie Hicks

Founding CEO, Angi
(formerly Angie’s List)



“The Future of Healthcare—Insights from a Four-Time Healthcare CEO”

Heyward R. Donigan

Health Network One
(former CEO, RiteAid)

Part B: 11:30 a.m.–12:30 p.m. ET

WORKGROUPS

We break out into three different CEO workgroups to address critical topics.

Workgroup 1—Healthcare, The Next Decade

Workgroup leader:

Michael Sutcliff

CEO, Thoughtworks

Workgroup participants:

Joseph G. Cacchione, M.D., CEO, Jefferson

James Hereford, President & CEO, Fairview Health Services

Marc D. Miller, President & CEO, Universal Health Services, Inc.

Workgroup 2—The Future of Health, Wellness, and Patient Care

Workgroup leader:

John Simon, M.D.

Founder & CEO, SimonMed Imaging

Workgroup participants:

Colleen Lindholz, President, Kroger Health (The Kroger Company)

Steve Silvestro, CEO, OptimizeRx

Ramin Davidoff, M.D., Co-CEO, Permanente Foundation (Kaiser Permanente)

Workgroup 3—Healthcare Strategy in 2026 and Beyond

Workgroup leader:

Maria Ghazal

President & CEO, Healthcare Leadership Council (HLC)

Workgroup participants:

Heyward R. Donigan, CEO, Health Network One (Former CEO, RiteAid)

Jan Herzhoff, PhD, President & CEO, Elsevier Health

Don Antonucci, President, Providence Health

Wyatt Decker, M.D., Chief Physician, UnitedHealth Group



Robert Reiss | CEO, The CEO Forum Group

Hi, I'm Robert Reiss, and welcome to the fifth annual Transformative CEO Healthcare Summit. It's on healthcare over the next decade—December 11th, 2025.

As I'm thinking about the future of healthcare, I'm reminded of my 91-year-old mom. She now answers her phone on her wrist like Dick Tracy does, even though she's not the most technologically savvy.

Here's a scenario I can envision. She says on her watch, "You know, I'd like to try some of those McDonald's french fries." What will automatically happen is a car shows up—an autonomous, self-driving car. She'll get in the car, and it will start driving her to McDonald's.

But when it gets there, it actually passes McDonald's and goes to a different location, and the car will select a healthier option for my mom. What happened? Well, the car communicated with her electronic medical records and said, "Maybe those french fries aren't the best thing for her."

So what I'm thinking is: there's a problem, because that's where healthcare could go. And there's really a dichotomy—about what decisions are made by humans, and how we use AI and technology in the best way. To me, the decision has to always come down to the human—where it becomes not what we call artificial intelligence, but augmented intelligence.

Now, I use AI probably, at minimum, two hours a day on all types of things. I have my own board that I've made up, including people like Coco Chanel on marketing and stuff like that. I ask questions, I analyze things—but at the end of the day, it's up to me, as a thinker, as an individual, to make the decisions.

And I remember having a conversation with Dr. Redonda Miller, the CEO of Johns Hopkins Hospital, and she was saying, "You know, Robert, healthcare—it's going to be like *The Jetsons*," that 1960 show. We're already having so many of those elements in place, but we have to put it toward the patient experience.

So what I'm saying is: I wholeheartedly agree with what Redonda is saying there. And what we have to do is embrace AI—embrace it to its fullest capacity—but always remember that it has to be driven by humans and for humans. And the more it's tied in to the patient experience, the better outcomes we'll have.

So you are going to get to hear some fascinating discussions today from top CEOs in healthcare—in all areas of healthcare.

It will start off in Part A. You'll hear three keynotes. You'll also have CEO polling. And you'll get—drumroll, please—you'll hear the Top 10 CEOs transforming healthcare in America.

Now, in Part B—and this is the really fun part—you get to go behind the scenes and be in one of three work groups to hear how the CEOs communicate with each other and how they brainstorm about the future.

And then in Part C, you'll hear summaries from the CEOs. And this is all in a super-fast, exciting summit here.

So I welcome you. This is your summit. Write down any questions, write down any thoughts, any great ideas you have. Share them with other people.

And my real hope is that you leave this so that tomorrow, next week, you have at least one major idea that you implement—into your work—so you can share how you and your organization can be even more successful.



Colleen Lindholz | President, Kroger Health (The Kroger Company)

A NEW COLLABORATIVE MODEL FOR THE FUTURE OF HEALTHCARE IN AMERICA

Thank you, Robert. I love our conversations. Thank you so much for taking the time to connect with me. Your work bringing together transformative voices in healthcare continues to make an impact.

The United States spends more money on healthcare than any other country, but we have some of the poorest health outcomes. Last year, our country spent over \$14,000 per person on healthcare. The average spend of other high-income countries was only \$7,000. Our system is built profit-driven, not patient-driven. It's built for reaction and treatment—the sick—not for prevention.

At Kroger Health, we confront this paradox with a radical aspiration: to fill fewer prescriptions per patient. We believe the preventative power of food can reduce the need for medications. Food is the heartbeat of the Kroger company, but healthcare is the pulse.

We have three ways that we are going to get to our goals—three big, bold moves.

First, there's power in food for health. We believe that healthy eating should be simple. That's why we created the OptUP program. Our OptUP tool really helps customers make informed grocery decisions fast, reliably, and with ease. Food is scored on a scale from one to 100 to offer a snapshot of its nutritional value. The higher the score, the more nutritious the food. It's available online and on our app.

We want to change the way America eats, and that begins with knowledge. By empowering consumers, we're not just selling groceries—we're giving them an opportunity to live a healthier life.

Second, we know that what we want to do cannot be done alone. So we are committed to bringing together stakeholders from all industries to solve big problems—to change the way that healthcare is delivered in America.

We cannot be reactive. We cannot keep playing defense as our communities continue to suffer from chronic illness—much of which can be positively impacted by food. Intentional collaboration is the key to shaping our future.

Retail brings reach, and research brings evidence. Providers bring trust, and technology brings scale. Policy opens doors, but it is people that bring the passion to drive change.

To that end, the Kroger Health team has led the change. And in 2025, we established the inaugural Nourishing Change conference to reimagine the future of retail health by bringing together competitors, academia, government officials, and research companies to co-create solutions.

We will make an impact on future generations across our country. And in 2026, we're holding our second Nourishing Change conference. I hope you'll join us for that important event.

Lastly, we believe every consumer has the right to own, share, and benefit from their own personal data, so our next moonshot is focused on the creation of a health passport. We need to bring together health and behavioral everyday data to empower consumers. Health passports can unlock a future where employers can incentivize healthy behaviors—where innovation and education are introduced and acted upon more quickly.

Consumers expect providers to have access to their information. And so we are championing an interoperable future to unlock better health outcomes, because right now it's very fragmented—not consistent and not easily shared.

At Kroger Health, care is personalized, not generalized. I believe that buying groceries and filling prescriptions is much more than just a sale. It's an access point to reach our community and to meet customers and consumers where they are on their journey in life—and to build trust.

My call to action is clear: intentional relationships and purposeful collaboration will set the stage for a better tomorrow. What people know me for—and what I've said often—is: there's power when we move in a unified direction at a pace that matters, for a cause that's much greater than ourselves.

Thank you, Robert, for this time, and I look forward to being on the panel.



Angie Hicks | Founding CEO, Angi (formerly Angie's List)

THE SECRET OF DRIVING A BELOVED BRAND

Thanks, Robert. It's great to see you again. And thank you for having me at your annual CEO Summit. It's a pleasure to be here with this incredible group of leaders.

I love talking about brands, but I want to start with something really simple: the most powerful brands are not about logos, not about colors, nor are they about clever taglines. They're actually about trust—because you're building a relationship with your customer.

Trust starts by really understanding your customers. When I first started Angie's List, I was the only employee, so I spent all of my time talking to our customers and building relationships. I knew that Mrs. Jones was remodeling her kitchen, and Mr. Smith was hoping to redo his garage doors. You really understand their pain points and their challenges and help them work through an important decision—caring for their home.

That was something I always enjoyed. It was one of my favorite parts of the job: talking to the customers—both homeowners and pros. And as the business continued to grow, I always wanted to think about ways I could keep having that personal connection with customers. Then the internet came along, and Angie's List became a website and then an app, so those connections became less natural. I had to figure out how to create them.

One of the things I introduced was office hours. Anyone can sign up to talk about anything. I dedicate a few hours a week and have 15-minute sessions. They can share suggestions for the business, a challenge they've had with the product, or even ask for advice.

What I found—and the reason I continue to do them—is that they're valuable for both the customer and for me. The offer of being accessible is great for company culture, because the team knows I'll always hop on the phone and talk to a customer. It empowers them to resolve things and feel supported through the organization.

Those are some of my favorite times of the week. I collect the feedback and share it with our product team. And if we see trends, those make it onto our roadmap.

I also want to add one more thing: when you're thinking about brand, there's the brand of the company, but there's also the brand of the entrepreneur or CEO. I was someone who would much rather stay behind the scenes, but I was forced to the front. Even if you're an introvert like me, being able to tell your story—your founding story—is a compelling narrative, especially for younger customers. Millennials and Gen Z like to work with and buy from companies they understand and believe in.

One thing I'll caution you on: always be authentic. You don't want a brand that's represented differently across touchpoints. You don't want your marketing team talking about the brand one way while customer service behaves another. Same goes for your personal brand—don't have someone develop a persona that isn't you. I was always clear with our marketing team: I am who I am. I want to make sure the person people see on TV is the same person they meet in the grocery store.

Angi has been guided by those fundamentals for 30 years, including through a rebrand in 2021 when we went from Angie's List to Angi. But the core didn't change: trust, authenticity, and relentless focus on customers.

Let me leave you with three things: get closer to your customers—listen to them. Be accessible. Be ruthlessly authentic. Don't build a brand that you're not. Make sure it shows in everything you do. And cultivate your personal presence as well, because it adds to your corporate brand.

Robert, thanks for having me. This has been fantastic, and I look forward to the breakout sessions later today.



Heyward R. Donigan | CEO, Health Network One (former CEO RiteAid)

THE FUTURE OF HEALTHCARE—INSIGHTS FROM A FOUR-TIME HEALTHCARE CEO

Thank you, Robert, for the incredible opportunity to speak at the fifth annual Healthcare Transformative CEO Summit.

As a 40-year healthcare executive, I'm excited to be a part of the future of healthcare—and one big component of that starts here.

The healthcare markets are in a transformation period, with a lot of soul-searching underway. Payers and providers alike have to chart a path for survival. At the same time, I've seen relationships between payers and providers seriously erode, and the ground battle intensifies. Everyone is trying to do their job and do the best thing for patients in an increasingly difficult environment. However, American demand for access to healthcare is seemingly unlimited, and managing healthcare costs in a significant way can cost your life.

Consumers are angry, and we are all fearful. What hope do we have?

As always, providers and payers can be better as allies than adversaries. But in reality, how would that work? It works when incentives are aligned.

There was a day in my past that shaped how I see the path forward. I've always believed in applying lean methodology to healthcare—where those who do the work help you transform the business for the greater good. I saw it in action at Premera Blue Cross, where we partnered with Virginia Mason Medical Center in Seattle to break down barriers and truly move forward to serve patients together.

To future-proof healthcare, I believe the mindset we need to change is the “we/they” provider-payer mindset. Only together can we win. We must drive alignment.

Smart, high-quality healthcare is always more affordable. And we cannot put cost before quality, because Americans won't tolerate it. There are millions of examples of quality, timely care and provider payment incentive alignment that makes care more affordable for the consumer.

The major shifts that must occur—in earnest, with the consumer squarely in the middle—are the following:

One: aggressively shift to value-based payments that are simple to follow, have real-time impact, and are focused on specialty pharmacy, specialty care, and hospital care.

Second: relentlessly address the lack of consumer visibility into pricing and quality with real-time, point-of-service shopping solutions, and alternatives offered by the provider.

If we did those two things as well as Amazon does, we would change the economics of healthcare as we know it. But it takes a national focus—more than one health plan and one health system—to create real change. I look forward to that happening, because if anyone can do it, we in America have the ability to make this change.

Thank you for the time, and Robert, thank you for the opportunity. I look forward to continuing the conversation on the panel.

SUMMARIES



Michael Sutcliff | CEO, Thoughtworks

So first of all, I have to thank Dr. Joe Cacchione from Jefferson, James Hereford from Fairview, and Marc Miller from UHS.

We really covered quite a few topics. The good news is, in terms of whether or not technology is helpful, all of them agreed that it's making an impact in terms of productivity. And one of the favorite phrases that I heard was balancing high tech with high touch—making sure that as we apply technology, we don't lose the human touch and the ability to provide empathetic care to the patients. But there's an agreement that the technology is useful in improving the productivity for different parts of the system.

Unfortunately, the not-so-good news is we have bigger problems than technology can solve in terms of managing the gap between the payers and the providers, and how they think about working together to optimize healthcare for the patients.

So we've got lots of experimentation going on across the three systems that we talked about today. They're all testing and learning things that are working, but they're all frustrated that there's still a very large gap between the vision of what the future of healthcare could look like and what it is looking like today.

We talked about the fact that, from the financing side of healthcare, we are at the precipice of a major challenge with what's going on at the federal level and funding healthcare—and the expiring time we have just in the next couple of weeks to handle all of the people who were using those financing systems to figure out what they're gonna do next year for their healthcare. And so we've got just a few weeks left to handle millions of patients' questions about how they're financing next year's insurance.

So: good news on the technology side, a little bit of a challenge in terms of the payer/provider schism, and certainly kind of a request for the government to help rethink how healthcare paying and financing is working, and whether or not we can change the way those work with the provider networks. So that's the quick recap of what we heard.



John Simon, M.D. | Founder and CEO, SimonMed Imaging

Robert, thank you very much. Michael covered some of the points, so I'm going to cover some additional points which I think are important, and just mention our panelists as I go.

We had Steve Silvestro from OptimizeRx, and I just want to attribute a couple of thoughts to some of the discussion we had.

In particular, a couple of key points: One is time for therapy. With the use of new technology, the hope is that patients will get timely therapy. In many scenarios, patients go through a series of false starts before they find the proper or best treatment—and in some cases, unfortunately, they maybe never get to that optimized treatment. But hopefully with the use of technology—expansion of the medical record to multiple sources—patients will get to the proper treatment faster and more efficiently.

I want to talk a little bit—which I thought was very interesting—with Colleen Lindholz from Kroger Health: the ability to reach patients beyond just the typical healthcare setting to try to set them in the right direction for improved health, particularly if you look at diet and nutrition. And I think everyone here understands how important the impact is. If we could get to a point where not only do we have companies like Kroger trying to educate patients, but if there's a way to tie that into the health record—to have interoperability even from what someone eats and diet—that would be a great step forward.

And the third panelist we had—delightful to have as well—was Dr. Ramin Davidoff from Kaiser Permanente. It was very interesting to see an institution that has integrated all the different elements to lead to better outcomes, and the fact that hopefully patients can get a higher KPI of care—having the ability to have actual resolution of problems.

So it's interesting. Going into the discussion, I was thinking of Kaiser being very strong in the preventive space because they see the patient along the whole time course. But the other component, which is very important to understand, is actually getting to resolution of issues with technology, organization, and use of data. And that's just as important—that when you do have a problem, it can be addressed quickly and efficiently.

And I think that's a very good point: that the use of technology hopefully will lead to not only advances in prevention, but also advances in treatment as well.

So those were a few additional points to add on to Michael. But I agree with you, Robert—it was quite an interesting and wide-ranging discussion. Thank you for the opportunity.



Maria Ghazal | CEO, Healthcare Leadership Council

Thank you, Robert. So we also had a terrific session. The title was Healthcare Strategy in 2026 and Beyond, and we had excellent panelists. We had Dr. Wyatt Decker of UnitedHealth Group; Heyward Donigan—CEO of Health Network One and former CEO of Rite Aid; Dr. Jan Herzhoff of Elsevier Health; and Don Antonucci, president of Providence Health.

Our workgroup explored that healthcare is at a critical inflection point. The conversation focused on tangible outcomes and transformative forces. We had a lot of conversations about affordability and the risks and promises of AI. The leaders and panelists all drew on their learnings from their full careers, beyond where they are today even.

Some key takeaways we discussed: first, very much the opportunities and challenges for both AI and value-based care. That was a big conversation.

A big message was how much we need to build bridges—not so much arguing but we really need to be working together across different sectors.

A few takeaways on AI: the opportunities—reducing administrative burden, improving operational efficiency. Lots of conversation about that. Wyatt, you told a great story about how it's life-changing for a lot of the physicians in particular and other caregivers.

Long-term: transforming clinical workflows and diagnostics, enabling more personalized care. Some of the challenges: we certainly don't want it increasing friction between payers and providers because we're using this data and using it as a tool. We want to make sure that doesn't happen.

Another challenge is ensuring trustworthiness and safety and patient safety in clinical applications. Excellent points by Heyward about some of the real challenges we should be worried about. And then not getting so distracted by the shiny objects. Jan, you made the great point about moving fast but balancing it with appropriateness—not overusing it, not appearing disingenuous.

And Wyatt, I liked your comment about: we're talking about AI so much, but yet we don't talk about the fact that we use electricity to provide care. So maybe we're over-talking about AI in some ways.

So what are some solutions? Definitely the administrative solutions; providing clinical guidelines; making sure that we're still using peer-reviewed literature at the point of care; developing controlled platforms for patient engagement and clinician decision support.

Value-based care: Great opportunity on the affordability front—that again was a key theme with everyone—affordability of healthcare and healthcare costs. The challenge is: even if people know what it is, there are different definitions, and there's some staleness to it. And as we all know, fee-for-service still dominates in healthcare.

So how are we going to continue to use it and promote it? Another challenge is rising costs and potential end of the subsidies and financial support for the ACA marketplace, and financial pressures—they just increase the urgency.

So what are solutions? We do need to remember managed care fundamentals and use them to scale value-based care models. That was a great point. And then again: we need to build bridges between payers and providers, or it's not going to work. It's not going to fulfill the promise.

And the government—we talked a little bit about how the government is going to try to help us, and may need to change some rules, change some laws, to enable new structures for longer-term sustainability.

So the real key takeaway—and the point Don made—is we really need to always go back to the patient. What is the patient really looking for? Are they looking for a lot of the things that we're talking about, or are they looking for help getting through to make an appointment?

And then at the end, I thought we had a great conversation about real estate and how it is driving a lot of things—like the point of care, leases, complex patients, other types of patients. Where is the best place, and how can we do more with home care? And of course, how well telehealth can work, certainly for certain treatments.

So we had a lot of great ideas. I think we came away with—it's a sobering discussion. There's a lot on everyone's plate. Healthcare costs are everywhere; the conversation about that. But there are real opportunities. And I think the whole building bridges and working together—and not using certain things to exacerbate the problems—we should feel excited going into next year.

The Transformative CEO Summit: March 24, 2026

Setting the Agenda

Part A: 11–11:30 a.m. ET

WELCOME & OPENING SPEAKERS

Opening presentations set the stage for our CEO problem-solving work groups.



“Strategic Leadership”

Judy Marks

Chair, CEO & President,
Otis Worldwide Corporation



“The Future of Global Trade”

Kate Gutmann

President International, UPS



**“How to Bring Love into a Culture
of 360,000 Associates”**

Sébastien Bazin

Chairman & CEO, Accor Hotels

Part B: 11:30 a.m.–12:30 p.m. ET

WORKGROUPS

We break out into three different CEO workgroups to address critical topics.

Workgroup 1—Leadership, Strategy, Disruption

Workgroup leader:

Matt Guffey

Chief Strategy Officer, UPS

Workgroup participants:

*Joseph Armas, President,
Otis America*

*Adam von Gootkin,
Founder & CEO,
Highclere Castle Spirits*

*Nate Rempe, President &
CEO, Omaha Steaks*

Workgroup 2—Elevating People + Culture in an AI World

Workgroup leader:

Shawn Gulyas

CEO, humanworks8

Workgroup participants:

*Steve Jones, Global
Chairman & CEO, Allied
Universal*

*Farooq Kathwari,
Chairman, CEO &
President, Ethan Allen*

*Jessica Lee, Global Officer,
Talent Acquisition &
Associate Development,
Marriott International*

Workgroup 3—The Entrepreneur Mindset

Workgroup leader:

Stasia Mitchell

Global Entrepreneurship
Leader, EY

Workgroup participants:

*Gary Shapiro, Executive
Chair & CEO, CTA (CES)*

*Fred Laluyaux, Co-
Founder, President &
CEO, Aera Technology*

*Ishan Patel, Founding
CEO, Audien Hearing*

Workgroup 4—Mobilizing an Organization through Strategy

Workgroup leader:

Gary Dushnitsky

Deputy Dean & Professor of
Strategy & Entrepreneurship

Workgroup participants:

*Mike Critelli, Former CEO/
Chairman, Pitney Bowes*

*Catherine Keating,
Former Global Head,
BNY Wealth & CEO, BNY
Mellon, North America*

*Dr. John W. Mitchell,
President & CEO, Global
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Robert Reiss | CEO, The CEO Forum Group

Hi, this is Robert Reiss and welcome back for the 6th Annual Transformative CEO Summit, March 24th, 2026. The topic for today is Setting the Agenda.

When I think about the world and how AI is driving change and creating this whole new society, business, and economy, there's one word that I think is most essential for all of us to focus on today. That word is pivot.

So what is a pivot? It could be large, it could be small. It's where you move from one area to another one. And that's the purpose of today's session—for you to learn how to pivot just by hearing examples of what people are doing. Now I'm going to give you two examples of pivots.

One is a band that I love, the Beatles, as many of you know. On April 4th, 1964, they actually had the number five, four, three, two, and one songs on the charts. No one's ever done anything like that. A few of those were I Want to Hold Your Hand, She Loves You, Can't Buy Me Love. Right there, the Beatles could have easily stopped and stayed with what they were doing, kept that formula, and had maybe one or two more years of number one hits. Instead, the Beatles pivoted. And by doing that, they created Sgt. Pepper, Abbey Road, but really what they created more than anything was the concept of the new rock and roll. And that changed the world forever. If you think about that, the biggest changes happened in those five to six years where they did pivot.

Another pivot was in the 1863 era. That's when Cornelius Vanderbilt, who had a large shipping empire, sold it off and instead transferred and pivoted into railroads. By that, he grew his wealth geometrically to become one of the richest people in the history of the world. But also, he changed the face of our nation and our world.

So today is all about pivots. You are going to hear three keynotes and get a sense of where those CEOs are coming from. Then you're going to have CEO polls in real time. You'll get to see what other participants in the audience are thinking about change and about AI. And then third, you're going to hear our list of the top 10 businesses in America that our editorial board selected.

So really, this is your Transformative CEO Summit. Anything you like, put it in the chat. Let us know. Anything you don't like or want improved, put that in the chat. Let us know. We want to make this a good experience for you where you learn how CEOs are thinking.

Now, in Part B, you're going to hear what is my favorite part. You'll have over a dozen top CEOs and you'll get to hear behind the scenes how they think, how they communicate, and what's important to them.

Specifically, I'll give a callout to one of our CEO panelists who wrote the book *Pivot or Die*, which to me is the best book I've ever read on pivots. That is Gary Shapiro. You may also know him from CES, the world's largest conference with over 140,000 face-to-face attendees, which he's led for about 35 years. You'll hear from him and many other CEOs.

And anything you miss, don't worry, because we're going to have everything, including the polls, available on video and we'll email it to you within about two weeks.

So right now, this is your Summit. And here's what I'll say: let's get ready to rock and roll.



Judy Marks | Chair, CEO & President, Otis Worldwide Corporation

STRATEGIC LEADERSHIP

Thank you, Robert, for inviting me to join you today. It's an honor and a privilege to share my perspectives and experiences on strategic leadership.

I'm drawing on more than 40 years in industry, and I know it's a topic that sits at the intersection of progress, innovation, and organizational success. In today's world, where change is constant and disruption is inevitable, the role of a strategic leader is not to wait for the future to arrive. It's to shape it along the way.

At its core, it's about imagining what could be and then inspiring colleagues to make that vision a reality. Strategic leaders should be architects of possibility who are not content to simply anticipate and react. They must act with foresight, harness

trends important to their business, and cultivate empowerment, agility, and pace within their teams.

Robert, I believe there are a few key but critical building blocks that make strategic leadership effective. The first is vision. Every great journey begins with a vision, a compelling picture of a better tomorrow. Strategic leaders craft visions that unite, excite, and mobilize their organizations. They communicate their vision with clarity and conviction, ensuring everyone feels a sense of purpose and direction. A well-articulated vision provides a shared destination. It helps colleagues understand not just what's possible, but why it really matters. When colleagues know where the organization is headed, they often feel part of something bigger than themselves. At Otis, our vision is pretty direct. We give people freedom to connect and thrive in a taller, faster, smarter world. It's not just a reflection of what we do. It's a bold expression of why we do it. It speaks to our role in shaping the future of urban life and movement—both aspirational and grounded in purpose.

Next, let's talk about decision-making. In our complex world, leaders must make difficult decisions, often with incomplete information. Delay and too much analysis can be harmful at times, as others are looking to you for leadership. Strategic leaders accept this ambiguity. They gather insights, weigh options, and are not afraid to take calculated risks, always aligning choices with organizational values and long-term objectives rather than short-term gains.

Next, let's talk about resilience. The environment around us is ever-shifting. Technology is evolving faster than ever before. Markets fluctuate, and new non-traditional competitors emerge. Strategic leaders encourage teams to adapt and be nimble, to learn continuously, and to view change not as a threat but as an inevitable invitation to grow. With resilience, you need empowerment, because no leader can achieve a vision alone.

Strategic leaders empower others, building a culture of trust, collaboration, and accountability. They invest in people, nurture top talent, and create environments where creativity and innovation thrive. In my business and many of your businesses, we have no business without a customer. So customer focus is critical.

There's no replacement for a deep, unwavering commitment to your customer. This mindset applies to strategy as much as day-to-day execution. To be successful and earn your customers' trust and loyalty, you must relentlessly focus on the customer experience and inspire all the colleagues around you to do the same. Listen to your customers and respond to issues quickly, clearly, and always with empathy. It's time to be a change agent. I believe change is inherently positive and necessary for progress. I have witnessed and lived through several technological revolutions and always recognized its importance as a tool to improve lives and advance society. I encourage early technology adoption and continuous learning to stay ahead, drive positive change, and fuel disruption.

Our world today is defined by growing complexity, disruption, and opportunity in equal measure. Those who can think strategically, act decisively, and adapt continually are most likely to find success. Leaders must dare to envision boldly, decide wisely, adapt gracefully, and lead with unwavering integrity. By doing so, you will not only guide your organization to success, but you will leave a lasting legacy of leadership.

Thank you again, Robert.



Kate Gutmann | President International, UPS

THE FUTURE OF GLOBAL TRADE

Thank you, Robert, and hello everyone. It's great to join you at the Transformative CEO Summit and to share perspectives on the future of global trade.

The changes happening right now will reshape the global business landscape for decades to come. For some businesses, these changes have created huge challenges. For others, they've unlocked once in a generation growth opportunities. And as always, the difference comes down to leadership and the decisions made by transformative CEOs.

2025 made one thing very clear. Changes in global trade don't stay contained. They ripple through every business, even those that see themselves as domestic. Many companies suddenly face more customs filings and higher tariff duties across far more products and supplies. And in many cases, the rules had to be rewritten almost overnight.

Do you know according to the Federal Reserve, U.S. customs collected \$287 billion in duties in 2025? That's a 192% increase year over year. So what do you think happened to international trade in such a challenging year? Well, it grew because



trade doesn't stop. It shifts. The value of international trade hit record highs. Global trade in goods and services reportedly exceeded \$35 trillion for the first time. And that's a 7% increase year over year.

The World Trade Organization reversed its outlook, moving from an expected decline to more than 2% growth. Now that said, this was a period of disruption, but many businesses turned it into an opportunity. 2026 is already being marked by new trade changes and challenges on a global scale. In Q1, we've already seen tariff revisions, airspace closures, key sea lanes impacted, and the biggest intraday swing in crude oil prices ever recorded. Changes are occurring that will long outlast current geopolitical tensions.

Today, several macro trends are driving fundamental changes in international trade. First, both sourcing and international distribution. The scale and pace of trade lane shifts are intensifying. Second, products traded internationally are becoming more complex and more valuable. And third, global demographics are evolving rapidly. So let's take a look at those trends and what they mean for you and your business. Then I'll share a few practical recommendations you can consider in your own organizations.

The first trend is shifting international trade lanes. And this didn't begin with last year's trade policy or tariff changes. It's been developing over the last five years and it's now accelerated at an even faster pace. As we saw, pandemic lockdowns and supply chain disruptions severely impacted international sourcing. Inventories dwindled, stockouts became frequent, and lead times increased. And as you know, companies miss sales. This forced many to rethink their reliance on highly concentrated suppliers, markets, and trade flows.

What started as a risk mitigation has now opened the door to new market opportunities and we're already seeing the impact. The fastest growing export countries are changing. Yesterday is not reflective of tomorrow. The IMF projects that ASEAN countries will move from sixth place to first in growth over the next five years and India is expected to move from fifth to second.

The implication is clear. Successful supply chains are shifting from fixed to fluid, quickly adapting sourcing to reduce risk and connect to high opportunity markets. More than 60% of new medicines in development require precise temperature control across the global supply chain. Even small deviations can lead to massive losses.

The third major trend is evolving global demographics. Aging populations in advanced economies and rapidly growing middle classes in developing markets are reshaping global trade. Aging societies are forcing labor shortages and rising wage pressures that's driving greater automation and more manufacturing in South Asia, India, Latin America, and the global south.

More than ever, transformative CEOs need to lead decisively, turning trade shifts into opportunity. So first, modernize your global supply chain. Easier said than done, but too many companies are still operating based on their historical footprint and processes and not their strategy. They're running fragmented, disconnected networks.

Here's one simple test. Ask how many different brokers you use around the world. You will likely be shocked at the answer. Or ask how diversified is your supplier base. End-to-end supply chain visibility combined with agility to adapt midstream creates real optionality. It helps mitigate risk from disruption. And just as importantly, it enables entry into new markets.

That visibility empowers you to optimize operations, remove bottlenecks, and streamline flows across the whole network. Your team may tell you it's too hard or even that it can't be done, but do know that many leading companies have already achieved this. Remember, global trade grew.

Next, don't be afraid to partner. Collaboration with the right strategic partners can accelerate growth and improve resiliency to take your supply chain to the next level. The critical point is this. Choose partners who can both say and do.

And finally, don't wait for the next disruption to rethink and redesign your end-to-end supply chain. Take the time now to whiteboard alternatives. Bring in strategic partners and model what you can achieve together. These are the keys that unlock growth, resiliency, and customer value in changing global business environments. The future of international trade will be challenging for everyone, but full of opportunity for many.

Robert, I know your transformative CEO sessions will continue to provide the insights and perspectives leaders need to navigate this change. Be well.



Sébastien Bazin | Chairman & CEO, Accor Hotels

HOW TO BRING LOVE INTO A CULTURE OF 360,000 ASSOCIATES

Well, thank you, Robert. Happy to be with each of you. I have nothing to teach you, I just want to share with you what I'm going through every time I actually have to make a decision, which is probably two or three times a day. It's been working for me, and obviously it's going to work for you and others.

I really go bottom up. Everything that I reflect on, I first go with my gut. Other people could say your belly or your stomach but my gut needs to tell me something that I should be reacting to that event.

Number two, when my gut is telling me something strong enough, I go with my heart, because my heart will tell me that the decision might have a lot of impact on people I impose it on. It could be detrimental, and it could be devastating, or it could be actually very generous. But my heart needs to tell me the direction of that decision.

And three is the brain, and the brain needs only to tell me one thing: by which timing do I need to make that decision, in terms of days or in terms of hours. But I've been saying for a long time, any CEOs who actually start with the brain, 90% will end up being a fool. And my own judgment, being French and maybe too arrogant, that's probably why we have so many great leaders in politics, and they actually act with a brain and they end up having the wrong decision. I wish they could start with the gut more often.

I guess the other thing which I want to share with you is when you run 350,000 people in so many different colors of skin, religions, languages, and many of them never went to university, they need two or three things, which is why I travel 300 days a year.

They need to be identified. They need to be recognized. They need esteem from you. And probably more than anything else, they need to be told how much you like, and I say love, love them. Because if you give them that love, and you have to mean it, then they're going to go the extra mile with trying to actually prove to you that they're worth that love. And I finish all my videos with an "I love you" message across the organization of Accor.

And I'll give you an anecdote which is probably the most touching for me and one that I'm going to remember. It was about 12 years ago, in a very tiny village in Lithuania, one which I've never been to before. I was stopped by a very tiny woman, of low-income, about 65-67 years old. I was introducing myself and she must have seen me on videos for the last 12 years. She took me aside from the group, and she wanted to say something to me. She grabbed my hand very nicely, and she said in very approximate English, "Monsieur, please, please, please, can you only tell me, but only to me alone, how much you love me."

And it was the only time when I realized that the love message, which I've done unprompted for 12 years, actually has a meaning to each of the 350,000 people. So again, it works for me.

The counter side of it is if you want to recognize those people and if you want to love them, they want to see you. You need eye-to-eye contact. You need to come back, because otherwise it's shoddy, and it's done over Zoom, and it doesn't work the same way.

So I travel and go all over the globe, four times every continent and, actually, I like it. So that's what it takes to be the CEO of a service company. It could be very different if you're a digital tech company. You don't have that many souls. Sorry, it's not a lesson. It's not lecturing. It's just who I am. Merci. Thank you all.



Matt Guffey | Chief Strategy Officer, UPS

LEADERSHIP, STRATEGY, DISRUPTION

So, Robert, thank you. First off, let me say this. If you were not in our breakout session, Robert, with the three panelists I had, you missed it. Because we did determine that if you had been in our session, you would have had the opportunity to have a great steak, a great cigar with a great glass of gin, and Otis would have taken you safely anywhere you needed to be.

We had a wonderful session. But let me just tell you, all kidding aside, I would put this in three tenants, if I could.

One, we talked a lot about how to pivot and how to think about strategy in a new way. The accelerated pace of change in all of our industries is moving so fast. But how we navigate through these challenging times, I would put it under these three tenants: customer first, people led, and innovation driven.

What I mean by that is, between Joseph, Adam, and Nate, they did a phenomenal job, especially as it relates to customer first, of always meeting the customer where they want to be met. Not just thinking about the customer of today, but also the customer of the future, and how AI is acting as a disruptor. We will all be faced with a consumer that is hyper-connected and hyper-informed.

So just be thoughtful from a customer-first perspective, always meeting the customer where they want to be met.

The other piece is being the best in the world at what you do. Many times, we can look at everyone else around us, but knowing what our value proposition is and knowing what we are the best at, and being able to stand and shout that to our customer base—that's from a customer perspective.

I would say people led is the next piece. We talked a lot about culture and being people first, people led, and making sure that we bring all of our teams along with us.

You think about the years of these companies—Otis over 150 years, Omaha Steaks over 100 years, Highclere making gin for centuries, and UPS for 118 years. Understanding the value of culture is critical, but not just where you are today—what people you will need to lead the company, the culture, and the strategy for the future so you're not disrupted but become the disruptor.

And then the last piece is innovation. We talked about how innovation is impacting all of our industries and how important it is to bring those three tenants together—customer first, people, and innovation driven—because they are all closely connected.

You need to ensure you have your people with you, and as Nate highlighted, understand the comfort curve—where your people are in terms of risk tolerance and how they are following along with you.

So, we had a wonderful discussion across those three tenants, and it was great to talk about how strategy today is no longer just a periodic exercise, Robert, but a continuous leadership discipline.

SUMMARIES



Shawn Gulyas | CEO, humanworks8

ELEVATING PEOPLE + CULTURE IN AN AI WORLD

Thanks, Robert. Grateful for that callout.

Our panel on elevating people and culture included Jessica Lee from Marriott International, Andy Saus from Allied Universal, and Farooq Kathwari from Ethan Allen. Some themes emerged.

The first is that when it comes to people and culture, it's a journey. Slow down. Everything is moving so fast, and everyone agreed we need to slow down and be intentional about what we're doing. We need to build consistent practices and disciplines to make those stick.

These organizations have been around a long time and have had a lot of success. I want to highlight how they're caring for people and what will be needed moving forward in this AI world. Everyone emphasized that AI should be viewed as a people enabler, not a people replacer. That was critical—how you position AI with your team.

Another foundational element was that vision is the compass, not AI. AI is not driving where you're headed. A strong vision and clarity around people and intentional actions are what matter. Jessica talked about interviewing and said you can't rely solely on AI because you need human interaction to truly understand candidates. AI can help behind the scenes, but you still need that front-facing human connection.

We also discussed leadership development. Leaders need to be both present and productive. Andy talked about leaders being physically present with employees while also driving productivity behind the scenes. A key theme was transparency—making sure people know what's happening in the organization.

Finally, if there's one leadership capability to focus on, it's understanding change management—how leaders navigate transition and build resilience in themselves and their teams.

It was a great conversation. Everyone should check out that video.



Stasia Mitchell | Global Entrepreneurship Leader, EY

THE ENTREPRENEUR MINDSET

Thank you, Robert, and thanks to Gary, Fred, and Ishan, who were incredibly honest about their entrepreneurial mindset. They come from different paths and industries, but share many common traits.

What stood out is that the entrepreneurial mindset is not a formula. It's a way of operating and being. You have to separate doers from talkers. You need to be true to yourself. Entrepreneurship and being a CEO is a performance sport, so your health and well-being matter.

We talked about energy—what gives you energy and what drains it. That helps guide your gut, heart, and mind. This shows up in your willingness to act before the path is fully clear, your discipline to reset during tough times, and your ability to evolve as the world changes.

Failure will happen. What matters is what you learn from it. What sets leaders apart is not just strategy, but how they think and decide differently. My takeaway for you is this: stop, breathe, and look at the sky. Reserve time for thinking. There's a lot of noise and information overload, but you need your own thinking time.

AI can help with research, but you still need to think. We're all here to navigate the growing pains, scaling challenges, and ups and downs of entrepreneurship.

Thanks, Robert. Thanks, everyone.



Gary Dushnitsky | Deputy Dean and Professor of Strategy & Entrepreneurship-London Business School

MOBILIZING AN ORGANIZATION THROUGH STRATEGY

Thank you, Robert.

We were fortunate to have a stellar set of panelists who helped unpack how CEOs mobilize organizations around strategy. We focused on three areas: how to develop strategy, the role of the CEO in decision-making, and how to mobilize the organization.

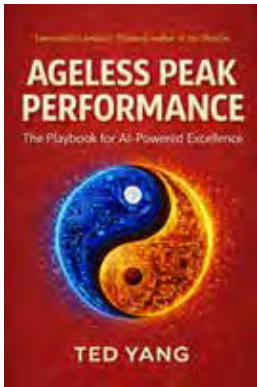
A key theme in developing strategy was listening—not just to customers, but also to investors and employees. One example was using anonymized surveys to gather insights on strengths, gaps, and opportunities. When it comes to mobilization, the ability to pivot is critical. One leader shared how they moved from manufacturing to technology by taking smaller, incremental steps instead of one large bet. This builds a capability to pivot at scale.

Finally, communication is essential. Leaders must be present, share stories, and consistently reinforce direction. Traveling, engaging teams directly, and having one-on-one conversations were highlighted as key practices.

To conclude, listening is essential for developing strategy, and communication across multiple channels is key to bringing the organization along the journey.

CEO LIBRARY

“One of my favorite quotes on learning is from Julia Child, ‘You’ll never know everything about anything, especially something you love.’ My love has been learning about business models and success, where I have read over 1,000 business books; following are three of those which I believe can be of great value to today’s top CEO.”



Ageless Peak Performance: The Playbook for AI-Powered Excellence

By: Ted Yang

Your best years can last longer than you think.

Ageless Peak Performance reveals how AI Adopters are extending their prime from 10–15 years to 50–60. By using AI as cognitive leverage, they offset declines in speed while amplifying judgment, pattern recognition, and strategic thinking. For experienced professionals, this means sustaining and elevating performance for decades. For younger strivers, it means climbing faster to seniority. This is not about tools; this is about transforming you and your team to perform at their best for longer. This is the playbook for redesigning how to think, learn, and execute together with AI.



The Champagne CEO: A Sparkling Journey of Success Through Courage, Confidence, and Collaboration

By: Terri Eagle

Building relationships, working through challenges, reinventing yourself, and celebrating the wins

From a childhood lesson in her father’s pizza restaurant to the executive boardrooms of New York City, *The Champagne CEO* follows Terri’s extraordinary sales career. Through roles at L’Oréal, Montblanc, David Yurman, and beyond, she shares hard-won wisdom on branding, leadership, and reinvention—proving that with ambition, kindness, and resilience, anyone can build a remarkable career.



The Yellow Cake Principle: Your Recipe for Influence & Success

By: Roger Grannis

If you want to have your cake and eat it too, start with this recipe for success.

The Yellow Cake Principle will show you how. Served up with actionable ideas and a generous dash of humor, *The Yellow Cake Principle* provides the ingredients you need to connect, influence, and persuade others. Whether seeking a promotion, approval for a project, financing for a start-up, we are all in sales. In *The Yellow Cake Principle*, Roger Grannis distills more than thirty years as a top-producing salesperson and communications expert into easy-to-implement takeaways you can put into practice today.



WHEN IT COMES TO CARE, one size does not fit all Katies.

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