



CRAFTING THE SOUL OF YOUR COMPANY TO WIN

Vistage 2025
Jon Chen

LEADERSHIP

VISTAGE DECISION MODEL



Categorizes the decisions a leader must make to optimize their business and enhance their leadership.

OUR AREA OF EXPERTISE



Mission, Vision, Purpose | Strategic Planning | Communication & Alignment | Organizational Values & Culture

SYSTEMS

The Advantage by Patrick Lencioni
The E-Myth by Michael Gerber
Good to Great by Jim Collins
Principles by Ray Dalio
Rockefeller Habits by Verne Harnish
Traction by Gino Wickman
The 4-Hour Work Week by Tim Ferriss
Measure What Matters by John E. Doerr
and so many more.



SOUL

How to Win Friends and Influence People by Dale Carnegie
The 7 Habits of Highly Effective People by Stephen Covey
5 Dysfunctions of a Team by Patrick Lencioni
Dare to Lead by Brene Brown
Start with Why by Simon Sinek
The Culture Code by Daniel Coyle
and so many more.





”

**“CULTURE EATS
STRATEGY FOR
BREAKFAST”**



**THE SOUL OF A
COMPANY IS IT'S
HUMANITY**

A THRIVING SOUL...

Meaningful Work

Engaged

Trustworthy People

Sense of Belonging

Excellence and Pride

Thriving Culture

Empowered

Cared For

Psychologically Safe

Love is unleashed

A THRIVING SOUL...

Compelling & Galvanizing Future

Engaged

Trustworthy People

Sense of Belonging

Excellence and Pride

Thriving Culture

Empowered

Cared For

Psychologically Safe

Love is unleashed



**“TOP TIER CULTURES
OUTPERFORM BOTTOM
QUARTILE CULTURES, BY
200%**

MCKINSEY & COMPANY



**PUBLIC COMPANIES WITH TOP
TIER ENGAGEMENT
OUTPERFORM COMPETITOR'S
EPS GROWTH BY
82%**

-GALLUP



**COMPANIES WHERE EMPLOYEES
FELT EMPOWERED WERE
85% MORE LIKELY TO
INNOVATE**

SYSTEM

DESIGN



SYSTEM

DESIGN

CADENCE

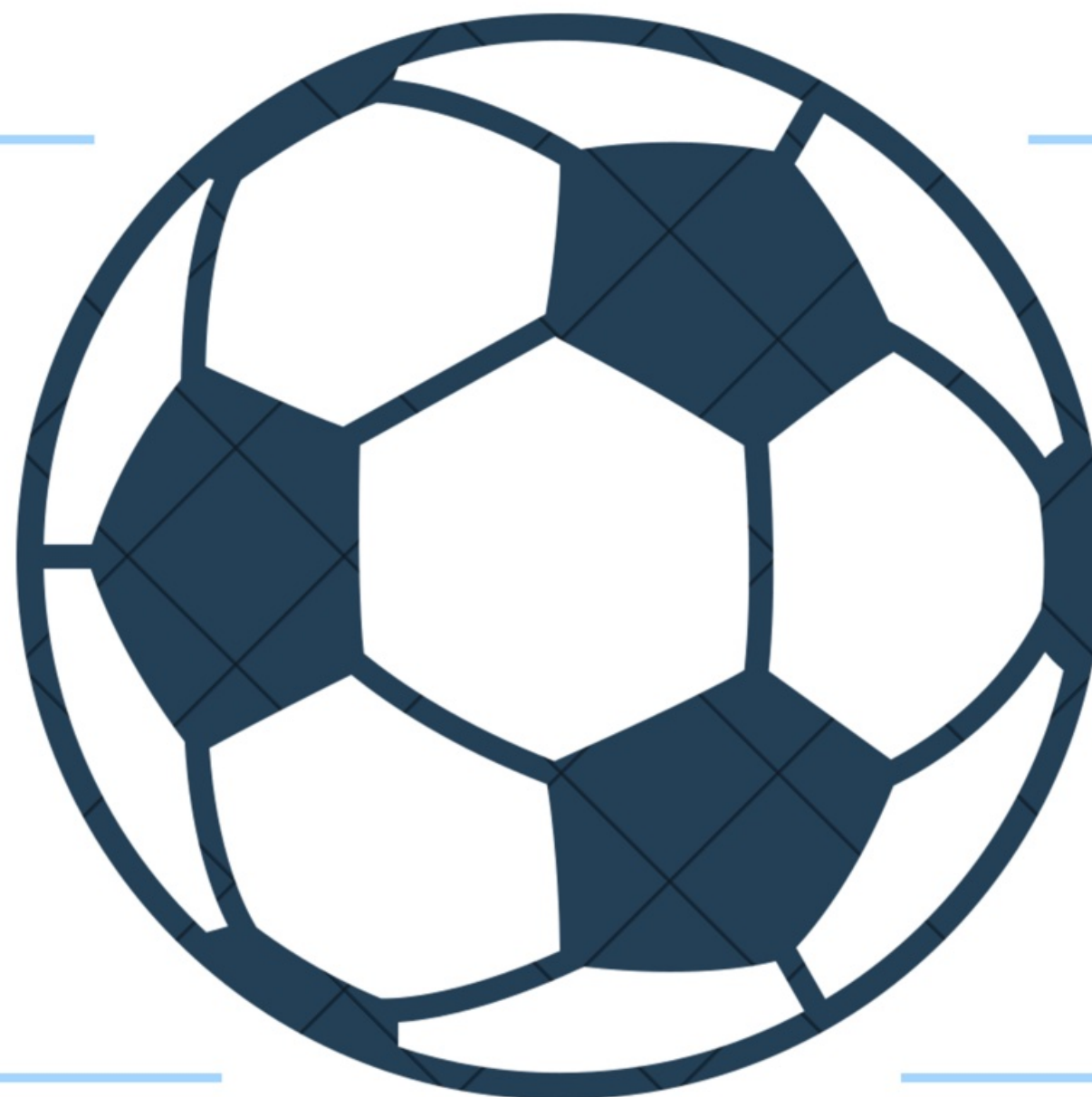


SYSTEM

DESIGN

CADENCE

SCORECARD



SYSTEM

SOUL

DESIGN

DESTINATION

CADENCE

SCORECARD



SYSTEM

SOUL

DESIGN

DESTINATION

CADENCE

IDENTITY/ETHOS

SCORE



SYSTEM

SOUL

DESIGN

DESTINATION

CADENCE

IDENTITY/ETHOS

SCORE

PEOPLE



GETTING CLARITY





”

**YOUR STRATEGY IS ONLY AS
GOOD AS YOUR ABILITY TO
ARTICULATE IT**

– BOB IGER

A ROAD MAP FOR YOUR BUSINESS

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

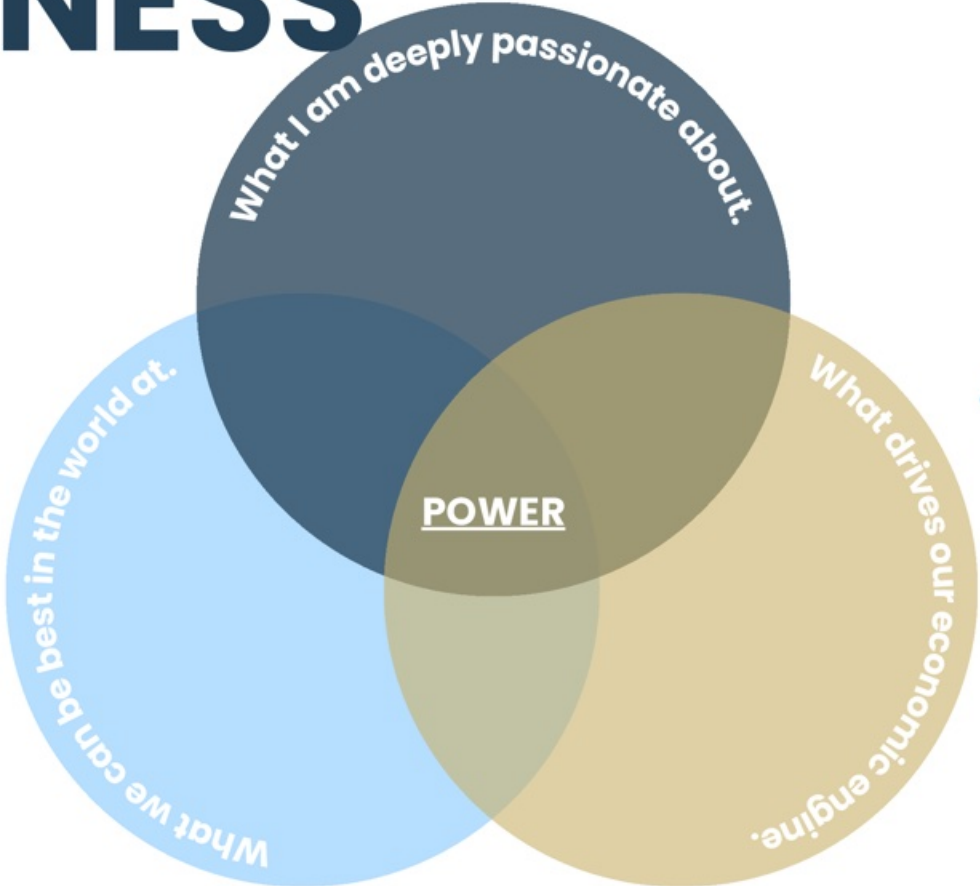
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

Date: _____
R: _____
P: _____
EE: _____

3-YEAR DIRECTION

Date: _____
R: _____
P: _____
EE: _____

1-YEAR FOCUS

Date: _____
R: _____
P: _____
EE: _____

QUARTERLY OBJECTIVES

QUARTERLY
OBJECTIVES

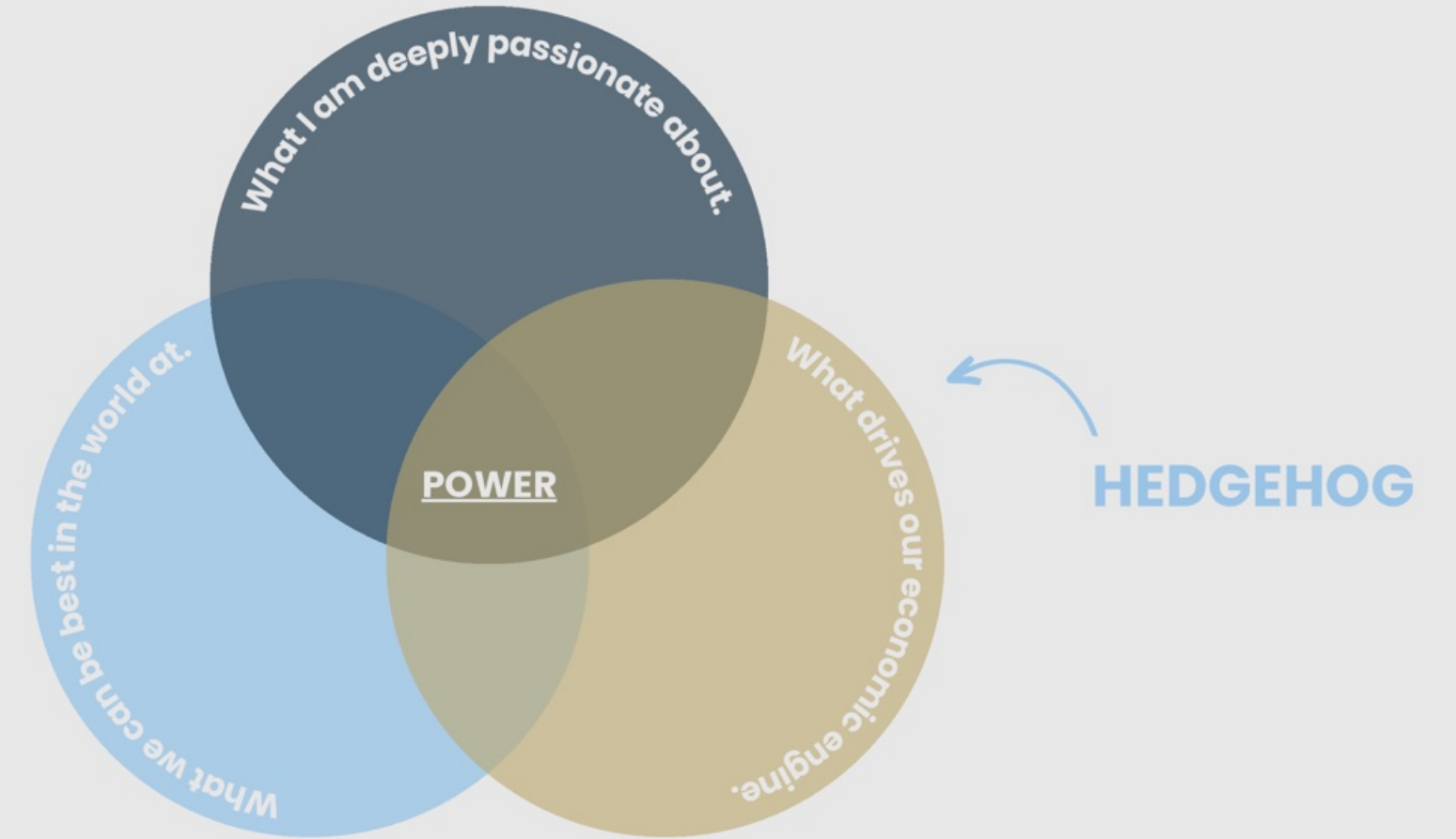
S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____



CULTURAL
ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

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QUARTERLY
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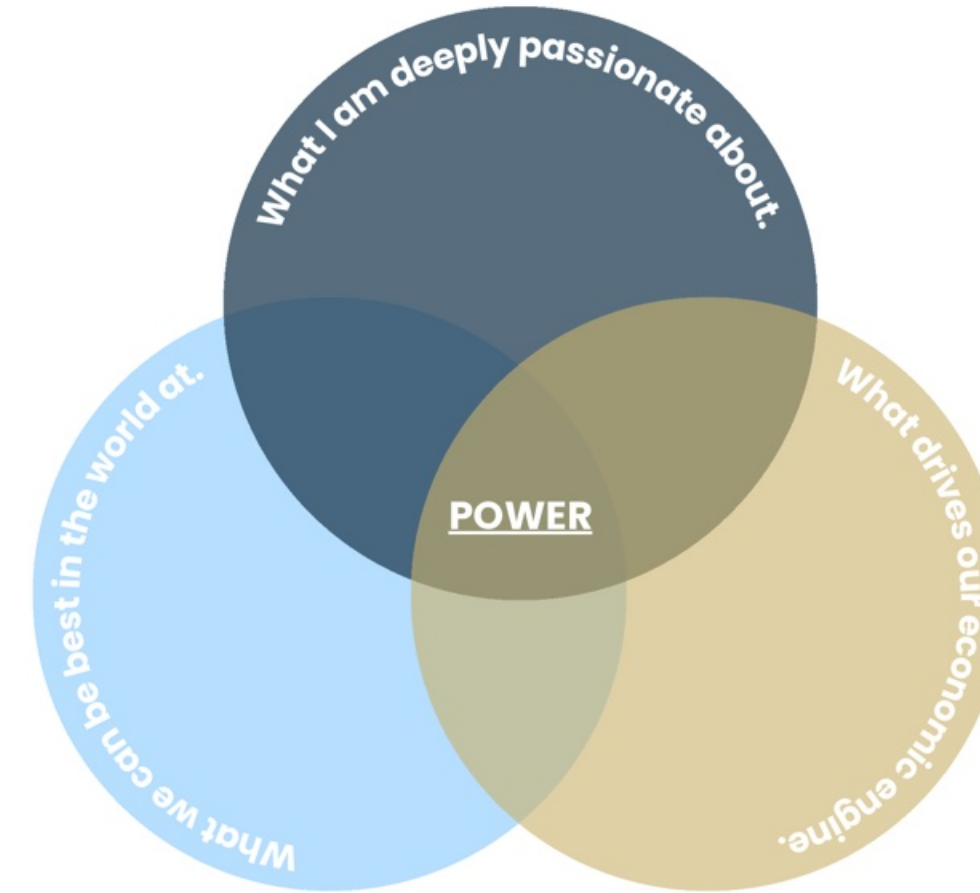
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HEDGEHOG

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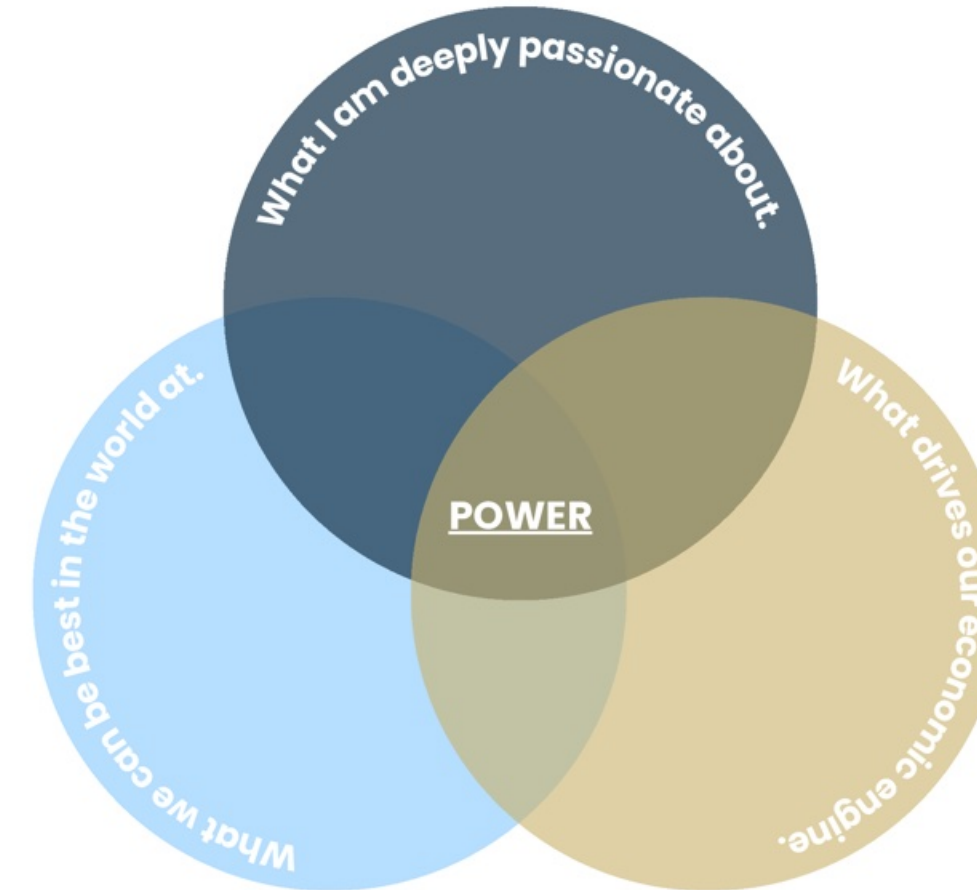
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

OUR BETS					
3-YEAR DIRECTION		1-YEAR FOCUS		QUARTERLY OBJECTIVES	
Date:		Date:		Date:	
R:		R:		R:	
P:		P:		P:	
EE:		EE:		EE:	

QUARTERLY
OBJECTIVES

COMPANY VISION DESTINATION



MEANING

HOW'S THIS FOR A VISION?

WE WILL STRIVE TO BE RECOGNIZED AS THE INDUSTRY LEADER IN KENTUCKY AND TEXAS. WE WILL BE A TRUSTED PARTNER TO BOTH OUR CUSTOMERS AND OUR VENDORS.

OUR COMPANY WILL BE RECOGNIZED FOR ITS CONSISTENT UNWAVERING EXECUTION OF GREAT CUSTOMER SERVICE, AND HARD-WORKING HONEST APPROACH TO TAKING GREAT CARE OF OUR CUSTOMERS BY DOING THE RIGHT THING. WE WILL WORK HARD FOR THEIR BUSINESS AND THEIR LOYALTY BY OUT HUSTLING THE COMPETITION EVERY DAY.

WE WILL BUILD A TEAM OF EMPLOYEES WHOSE DESIRE IT IS TO WORK TOGETHER FOR THE SUCCESS OF OUR COMPANY AND OUR CUSTOMERS. WE WILL RECOGNIZE HARD WORK AND HOLD EACH OTHER ACCOUNTABLE TO THESE GOALS. WE WILL BE A FINANCIALLY STABLE COMPANY THAT WILL SHARE SUCCESS WITH EMPLOYEES AND GIVE BACK TO THE COMMUNITIES WHERE WE LIVE. WE WANT OUR WORK ENVIRONMENT TO BE REWARDING AND FUN, AND ONE THAT ENCOURAGES A LEARNING ENVIRONMENT FOR EACH OF OUR EMPLOYEES TO GROW AS THEY WORK FOR OUR COMPANY. WE WILL MAKE "SMITH" COMPANIES AND THE "SMITH" FAMILY PROUD TO BE ASSOCIATED WITH US.

HOW'S THIS FOR A VISION?

OUR VISION IS TO CREATE, EXECUTE, BUILD AND EXPAND FUN, UNIQUE FOOD CONCEPTS IN THE BOSTON AREA AND BEYOND VIA OUR DYNAMIC, ORGANIZED AND HIGHLY TACTILE CRAFT CASUAL RESTAURANT GROUP. WE WANT TO BE RECOGNIZED BY OUR GUESTS AND CRITICS AS THE IDEAL BRAND AND DESTINATION TO GET THE BEST STYLE OF FOOD WE'RE SERVING; PHENOMENAL GUEST SERVICE & AN EXPERIENCE WORTH SHARING.

ATTRIBUTES OF A GREAT ~~VISION~~ DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

03



ATTRIBUTES OF A GREAT ~~VISION~~ DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

DOMINATES OR TRANSFORMS THE
WORLD

03





”

**MOST PEOPLE
OVERESTIMATE WHAT THEY
CAN DO IN ONE YEAR AND
UNDERESTIMATE WHAT
THEY CAN DO IN TEN**

-BILL GATES

ATTRIBUTES OF A GREAT ~~VISION~~ DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

DOMINATES OR TRANSFORMS THE
WORLD

03


INSPIRES SOUL OF EVERY EMPLOYEE AND
CUSTOMER





”

**IF YOU WANT TO BE HAPPY, SET
A GOAL THAT COMMANDS
YOUR THOUGHTS,
LIBERATES YOUR ENERGY, AND
INSPIRES YOUR HOPES**



–ANDREW CARNEIGE





”
**MEANINGFUL WORK IS
MORE IMPORTANT
THAN SALARY.**

–70% OF GEN Z



”

**YOUR EMPLOYEES DON'T
GIVE A S!#@ ABOUT
YOUR REVENUE. NOR
YOUR EXIT**



HOW'S THIS FOR A VISION?

OUR VISION IS TO CREATE, EXECUTE, BUILD AND EXPAND FUN, UNIQUE FOOD CONCEPTS IN THE BOSTON AREA AND BEYOND VIA OUR DYNAMIC, ORGANIZED AND HIGHLY TACTILE CRAFT CASUAL RESTAURANT GROUP. WE WANT TO BE RECOGNIZED BY OUR GUESTS AND CRITICS AS THE IDEAL BRAND AND DESTINATION TO GET THE BEST STYLE OF FOOD WE'RE SERVING; PHENOMENAL GUEST SERVICE & AN EXPERIENCE WORTH SHARING.



We are going put 10 million smiles on people's faces by

by 2029

because Breakfast can make or break your day





We are going to transform 10,000 lawns

by 2030

because outdoor spaces are where people
connect





We are going build long-term, trusted, relationships

with 6,000 customers

by 2030

because our customers build where we live,
work, and play





We are going TO TRANSFORM 1000 ORGANIZATIONS

by BY 2035

because BUSINESSES (AND NON PROFITS) CHANGE THE WORLD





GREAT “BECAUSE” STATEMENTS

“The health of a society depends upon producing quality individuals”

– *K-8 school*

“Great Leaders build Great buildings,connections, people, and each other.”

– *Low Voltage Company*



“We believe everyone deserves a clean safe affordable place to live”

– *Private equity developer and operator of workforce housing*



MAP YOUR DESTINATION

We are going Where?

by When?

because Why?



”

**5-10 SOCCER SEASONS
FROM NOW:
WHAT'S THE WIN FOR
YOUR BUSINESS?**

DESTINATION HUDDLE



5m

Work alone on worksheet

15m

Large group sharing

DESTINATION STATEMENT

What's the win for your business

Why is it important for the world



Destination



S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

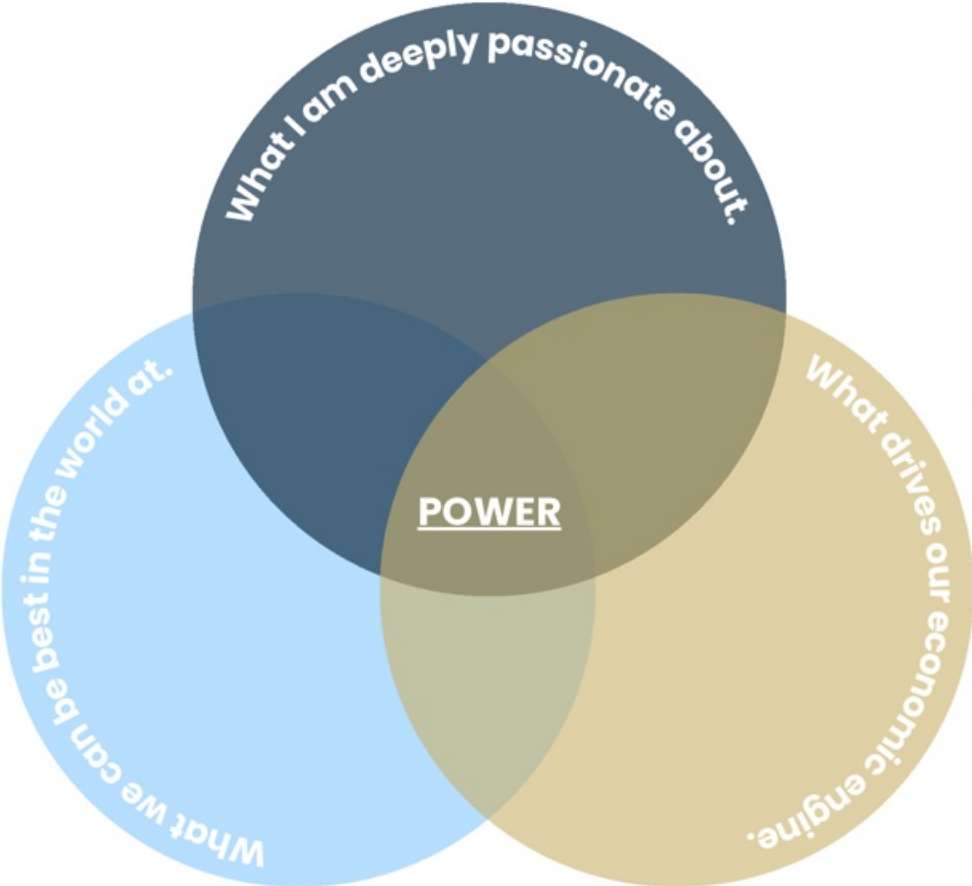
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

Date: _____
R: _____
P: _____
EE: _____

3-YEAR DIRECTION

Date: _____
R: _____
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1-YEAR FOCUS

Date: _____
R: _____
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QUARTERLY OBJECTIVES

QUARTERLY
OBJECTIVES



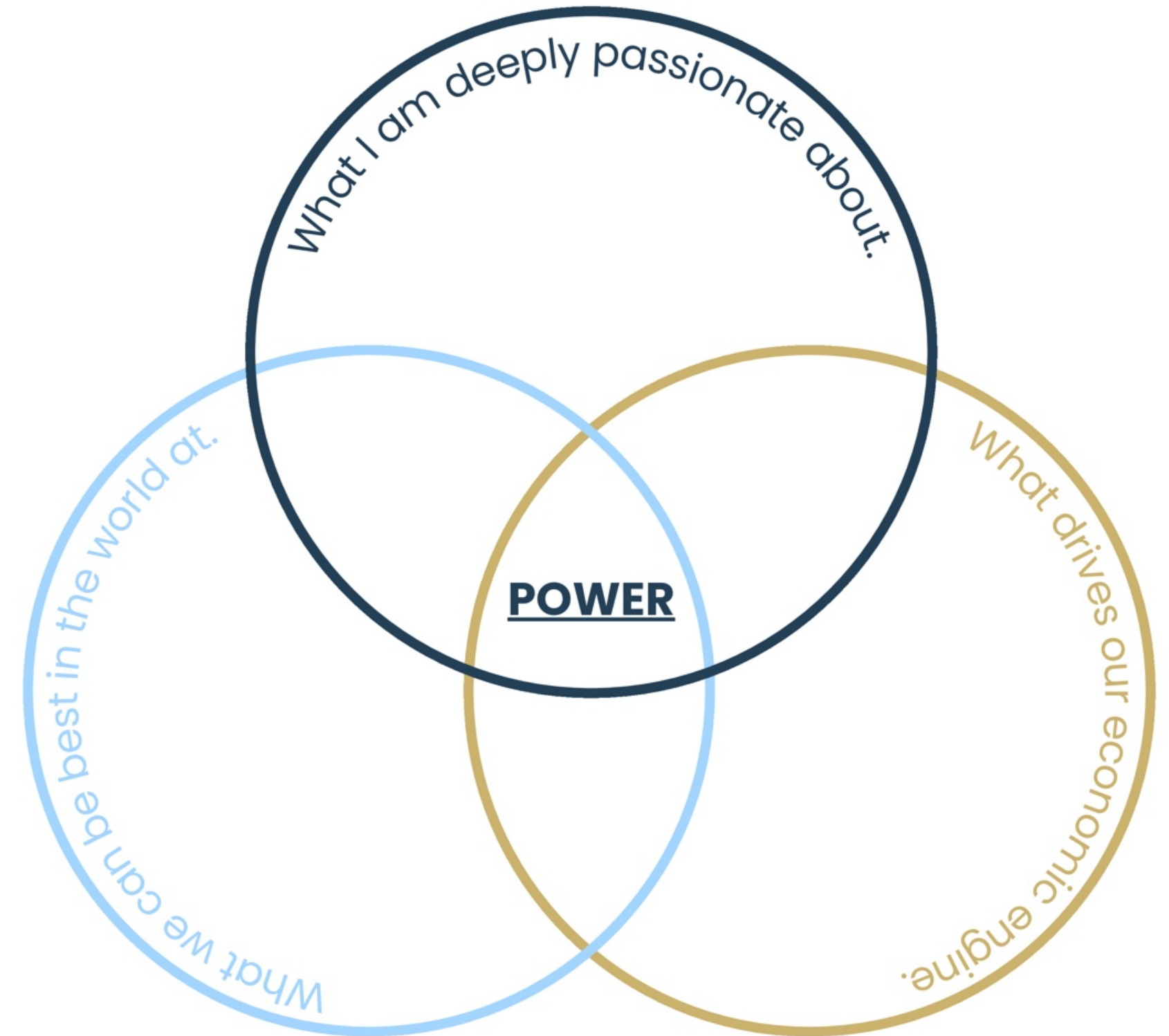
FIND YOUR HEDGEHOG

PASSION | EXCELLENCE

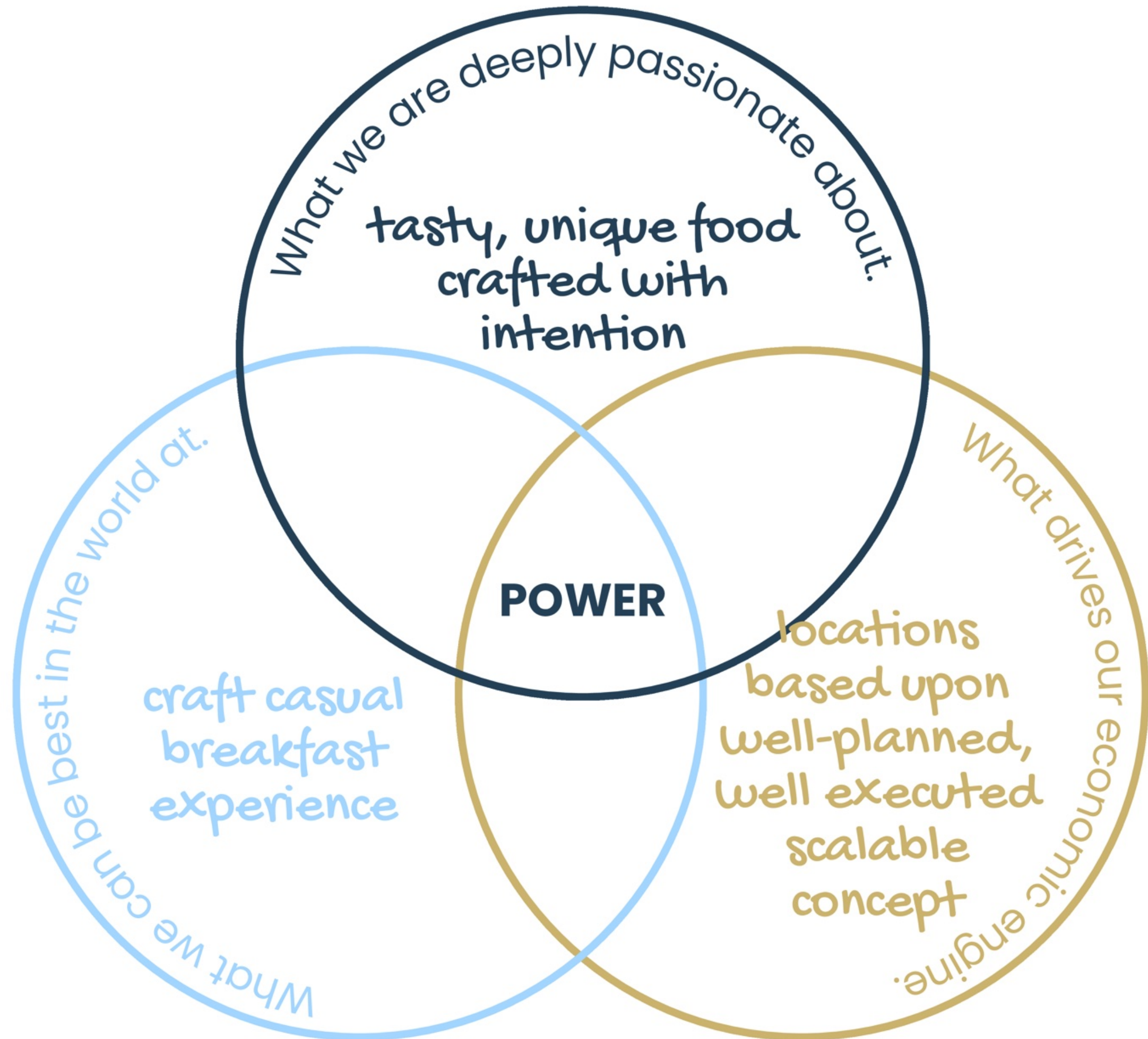
HEDGEHOG

Your power lies at the intersection of these three important questions:

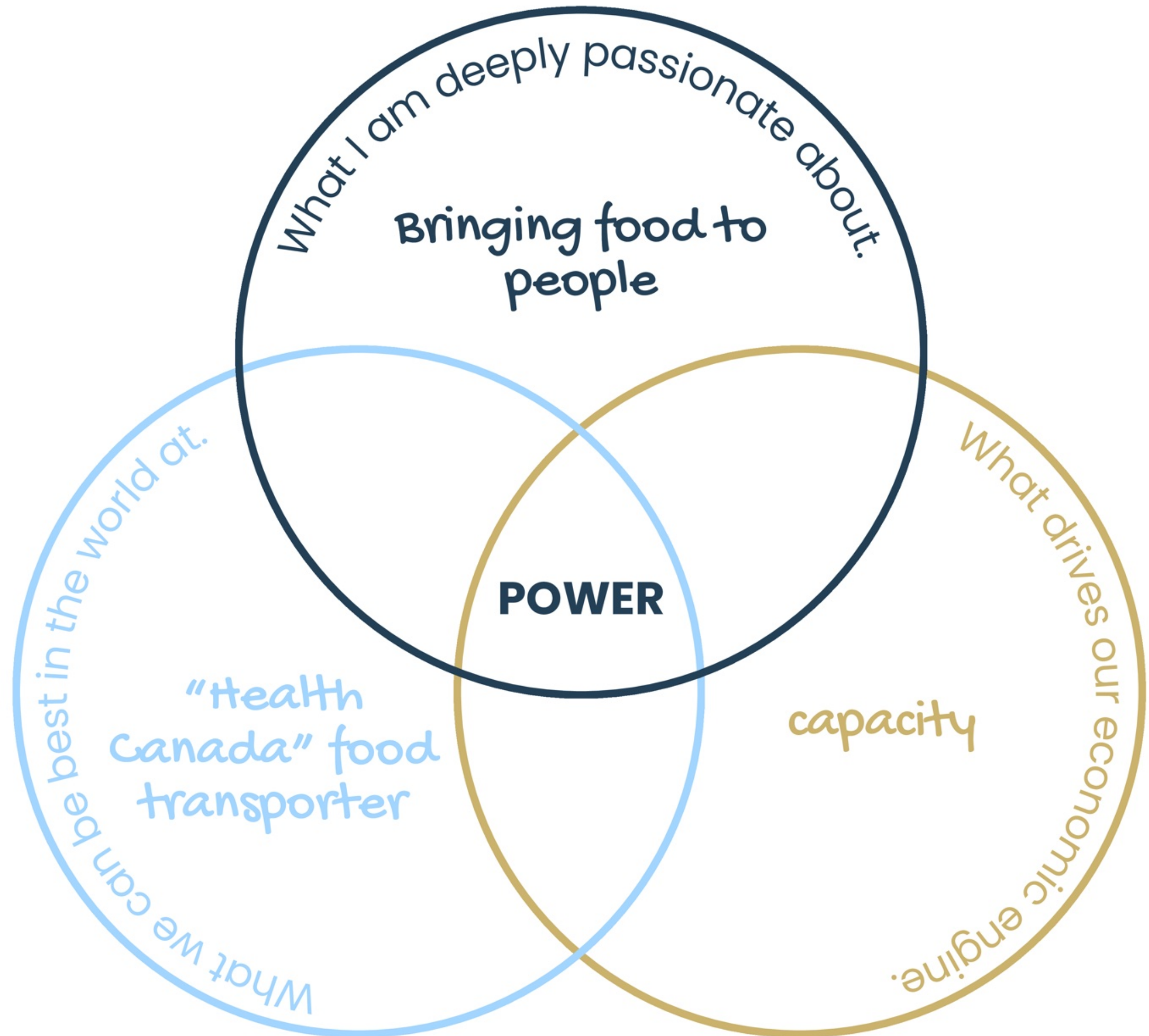
- What can we be the best in the world at?
- What are we deeply passionate about?
- What drives our economic engine?



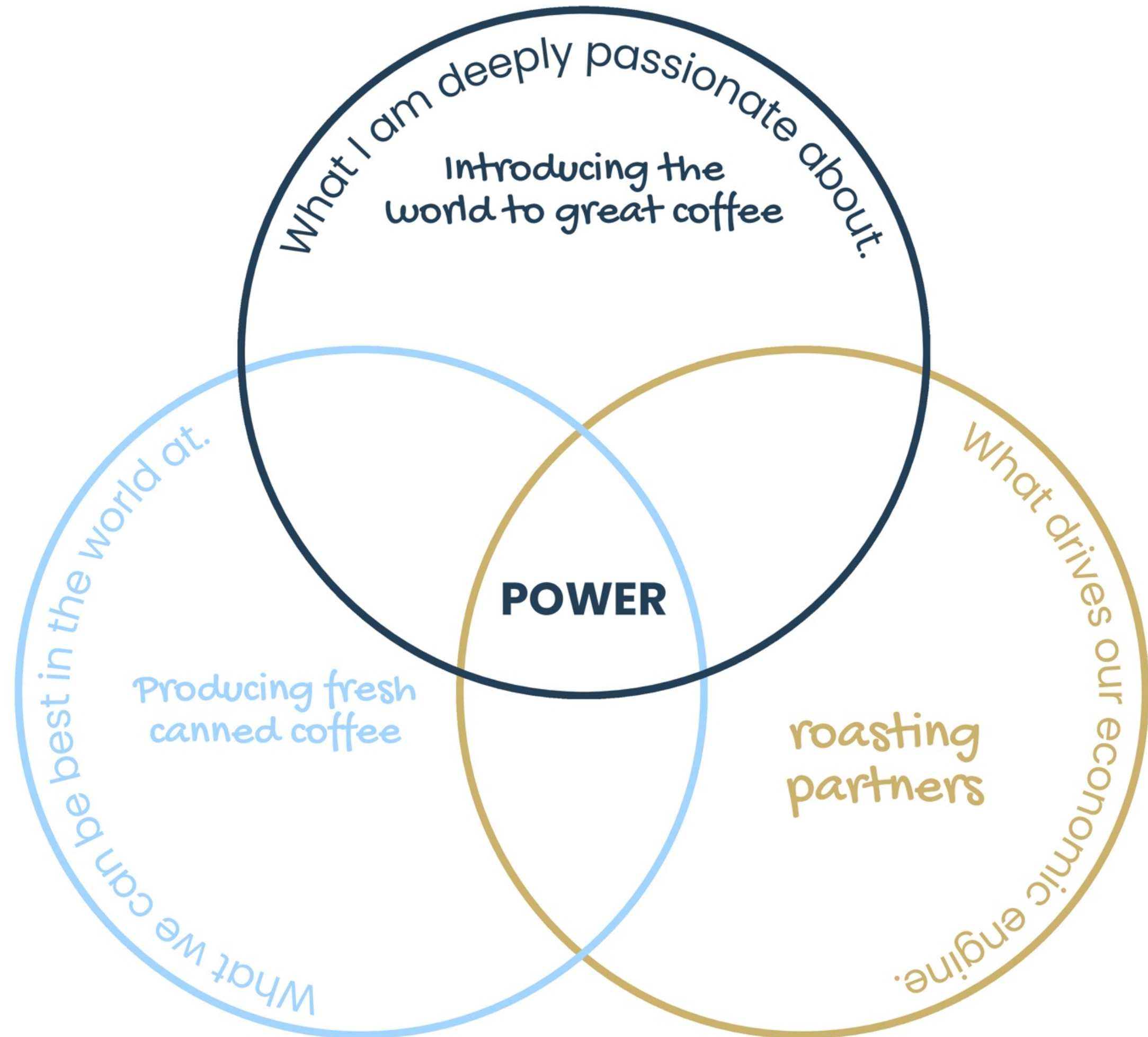
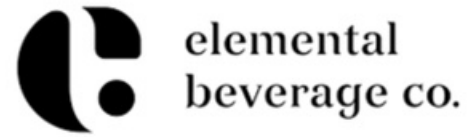
HEDGEHOG FOR BREAKFAST SHOP



HEDGEHOG FOR ~~MOLASSES~~ ~~COMPANY~~



HEDGEHOG FOR



HEDGEHOG HUDDLE



10m

Brainstorm some ideas for your hedgehog

10m

Large group sharing

HEDGEHOG STATEMENT

Passion: What gets you up in the morning?

What can you do better than anyone else

\$10M invested in what part of your acquisition funnel would drive the greatest growth?



Your Hedgehog



S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

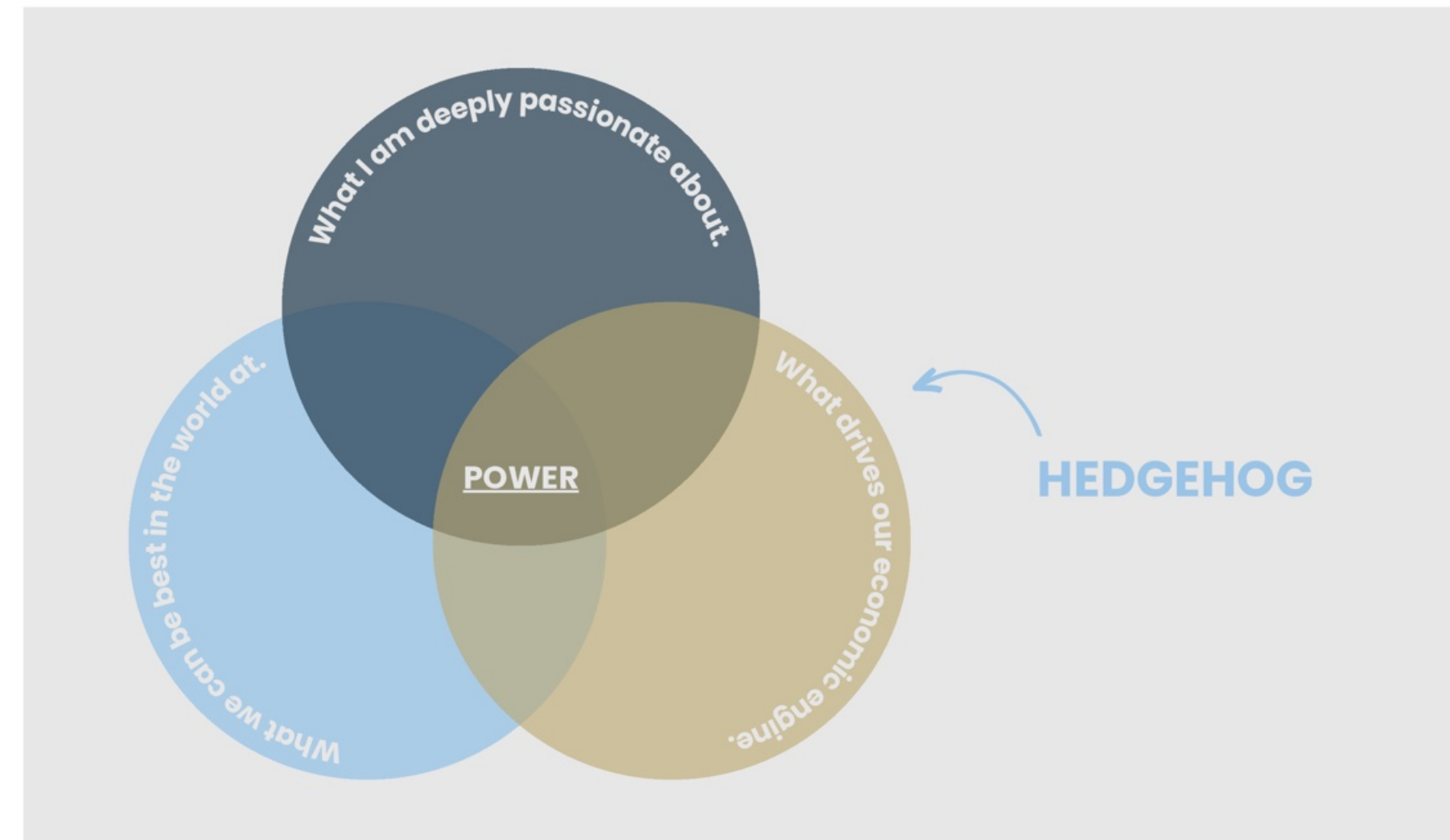
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QUARTERLY
OBJECTIVES



ONLINESS STATEMENT

BELONGING



”

**THERE IS NO FEELING OF
BEING ALIVE WITHOUT A
SENSE OF IDENTITY.”**

—ERIK ERIKSON

ATTRIBUTES OF A GREAT ONLINESS STATEMENT

01

SIMPLE, CONCISE, CLEAR

02

COMMUNICIATES WHO YOU SERVE (AND
DON'T)

03

UNIQUE TO YOU



ONLINESS STATEMENT

What sandbox do you play in?

We are the only _____
that _____

ONLINESS STATEMENT

We are the only motorcycle manufacturer
that makes big loud motorcyles for
macho guys

ONLINESS STATEMENT

We are the only airline

that makes flying affordable for
people who live in trailers



”

**“RICHERS ARE IN THE
NICHES”**

–PAT FLYNN



”

**“WHEN OTHERS ZIG
YOU ZAG”**

–MARTY NEUMEIER

ONLINESS HUDDLE



5m

Work alone on worksheet

10m

Large group sharing

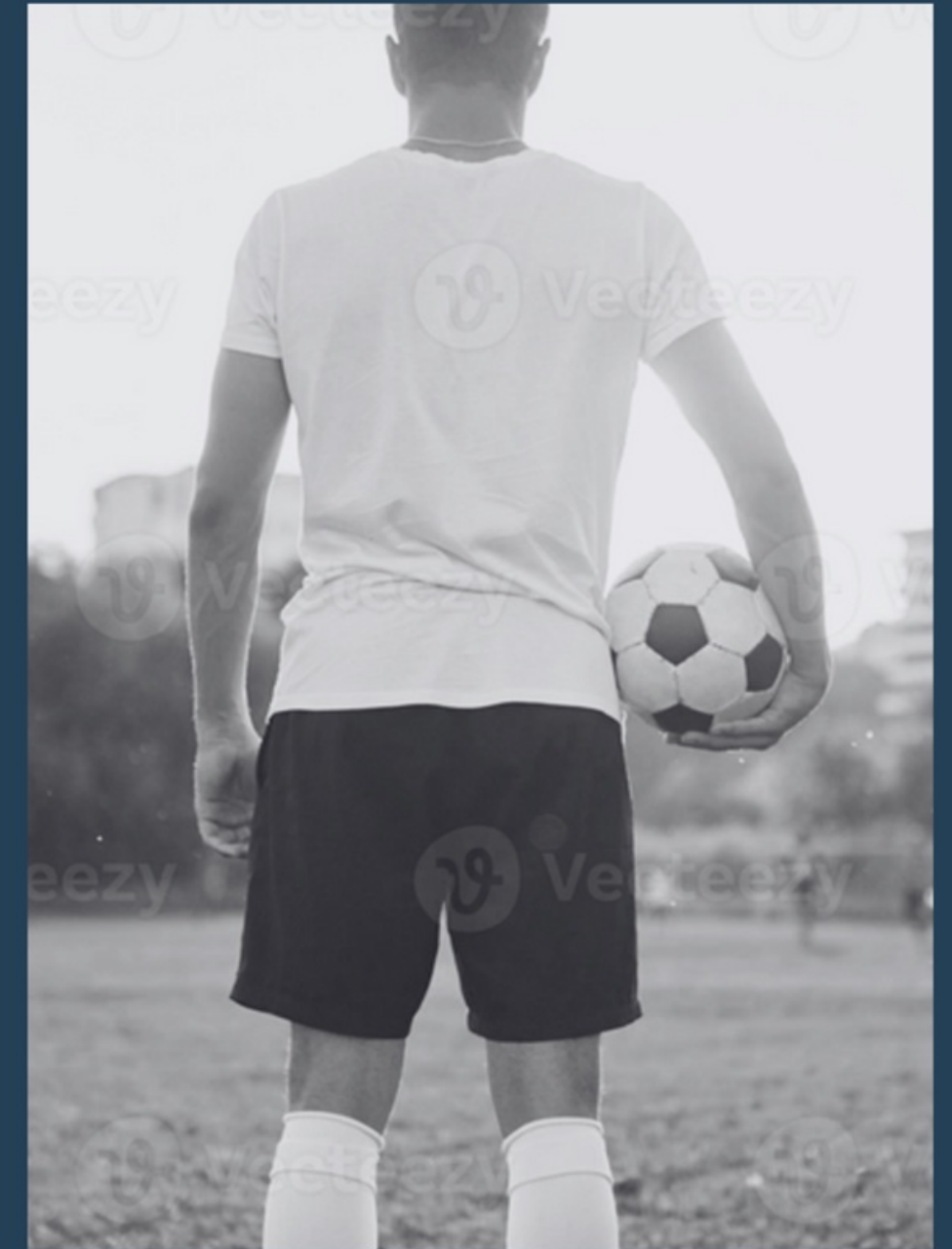
ONLINESS STATEMENT

Who are our top 2-3 competitors?

Why do your customers hire you over them?



Key Differentiator



S2 ROAD MAP

ONLINESS STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

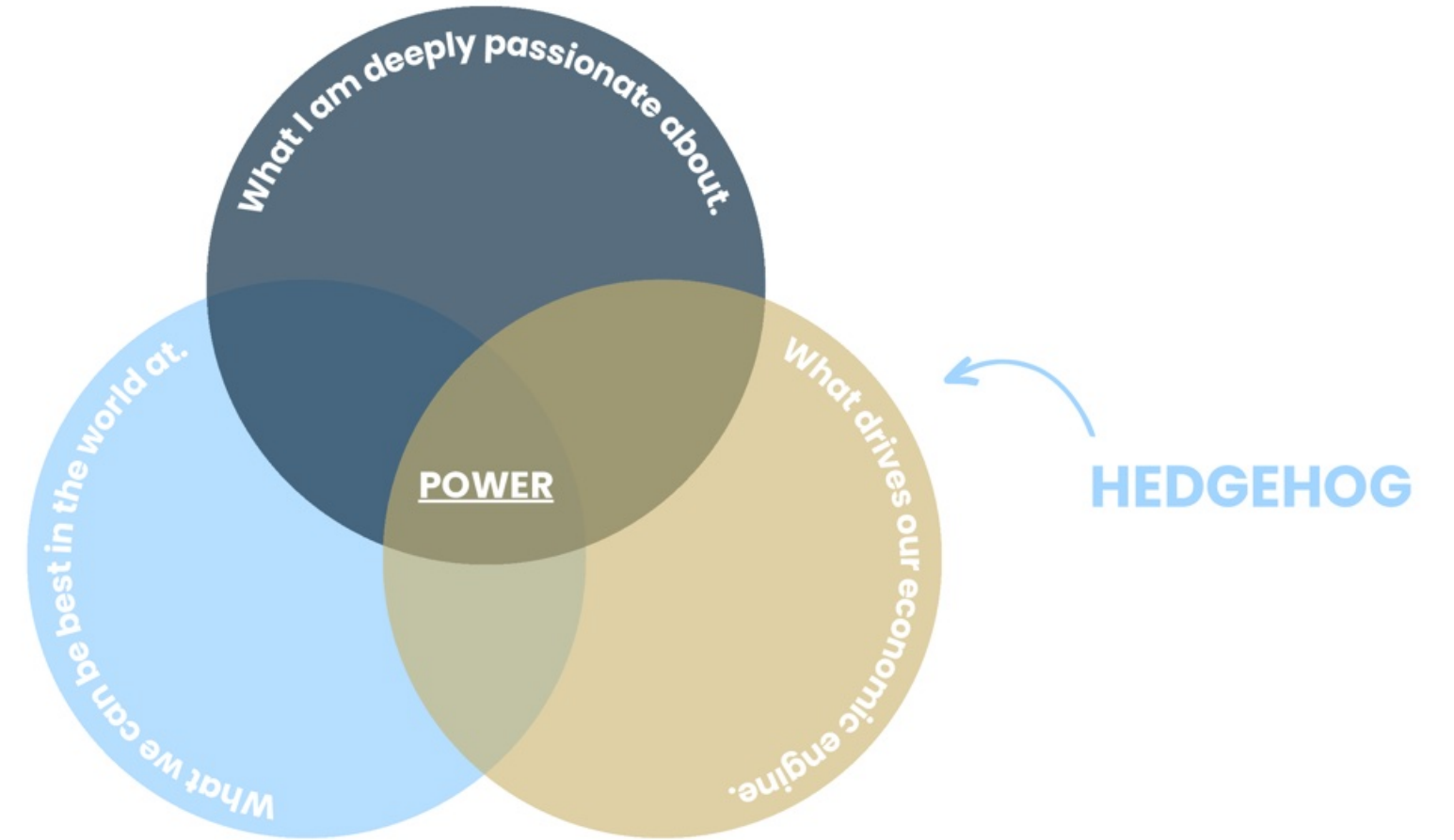
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QUARTERLY OBJECTIVES





CULTURE



CULTURE EQUATION

VALUES

WHO we say we are



ORG HABITS

Things we do together



CULTURE

The outcome of being who we say we are
(values)
and living them out together (org habits)

CULTURE EQUATION

VALUES



WHO we say we are

ORG HABITS

Things we do together



CULTURE

The outcome of being who we say we are
(values)
and living them out together (org habits)

VALUE TRAPS



ASPIRATIONAL

ACCIDENTAL

PERMISSION TO PLAY

CULTURE EQUATION

VALUES



ORG HABITS



CULTURE



DESCRIBE YOUR CULTURE

WHAT **IS IT LIKE** TO WORK HERE?

WHAT WILL GET YOU **FIRED** AROUND HERE

WHAT DO YOU WANT SAID ON
GLASSDOOR?

glassdoor[®]

**BEST PLACES
TO WORK**

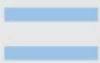


CULTURE EQUATION

VALUES



ORG HABITS



CULTURE

HABITS

WHAT CAN WE **DO** TO CREATE THE
CULTURE WE WANT?

WHAT CAN WE PUT IN THE **CALENDAR**?

THINGS WE **PRACTICE**



2024 SPRING SCHEDULE

FRIDAY	APRIL 12	7 PM	AT SANTA CLARA	SANTA CLARA, CA
THURSDAY	APRIL 18	7 PM	VS SONOMA STATE	STANFORD, CA - RUGBY FIELD
SATURDAY	APRIL 27	7 PM	AT CAL POLY SLO	SAN LUIS OBISPO, CA
SATURDAY	MAY 4	7 PM	AT SAN JOSE STATE	SAN JOSE, CA
THURSDAY	MAY 16	6 PM	VS UC DAVIS	STANFORD, CA - CAGAN STADIUM
SATURDAY	MAY 18	TBD	ALUMNI GAMES	STANFORD, CA - CAGAN STADIUM

■ HOME ■ AWAY

*DATES & TIMES SUBJECT TO CHANGE

A CULTURE TO UNLOCK YOUR PEOPLE'S POTENTIAL

TOOLS: CULTURE EQUATION
PUT IT INTO PRACTICE

1. DEFINE **3-4** VALUES
2. **DESCRIBE** CULTURE
3. IDENTIFY AND **SCHEDULE** HABITS
4. TELL YOUR PEOPLE (**7 TIMES**)



“



EMPOWERED



**COMPANIES WITH
EMPOWERED EMPLOYEES
ARE 85% MORE LIKELY TO
INNOVATE**

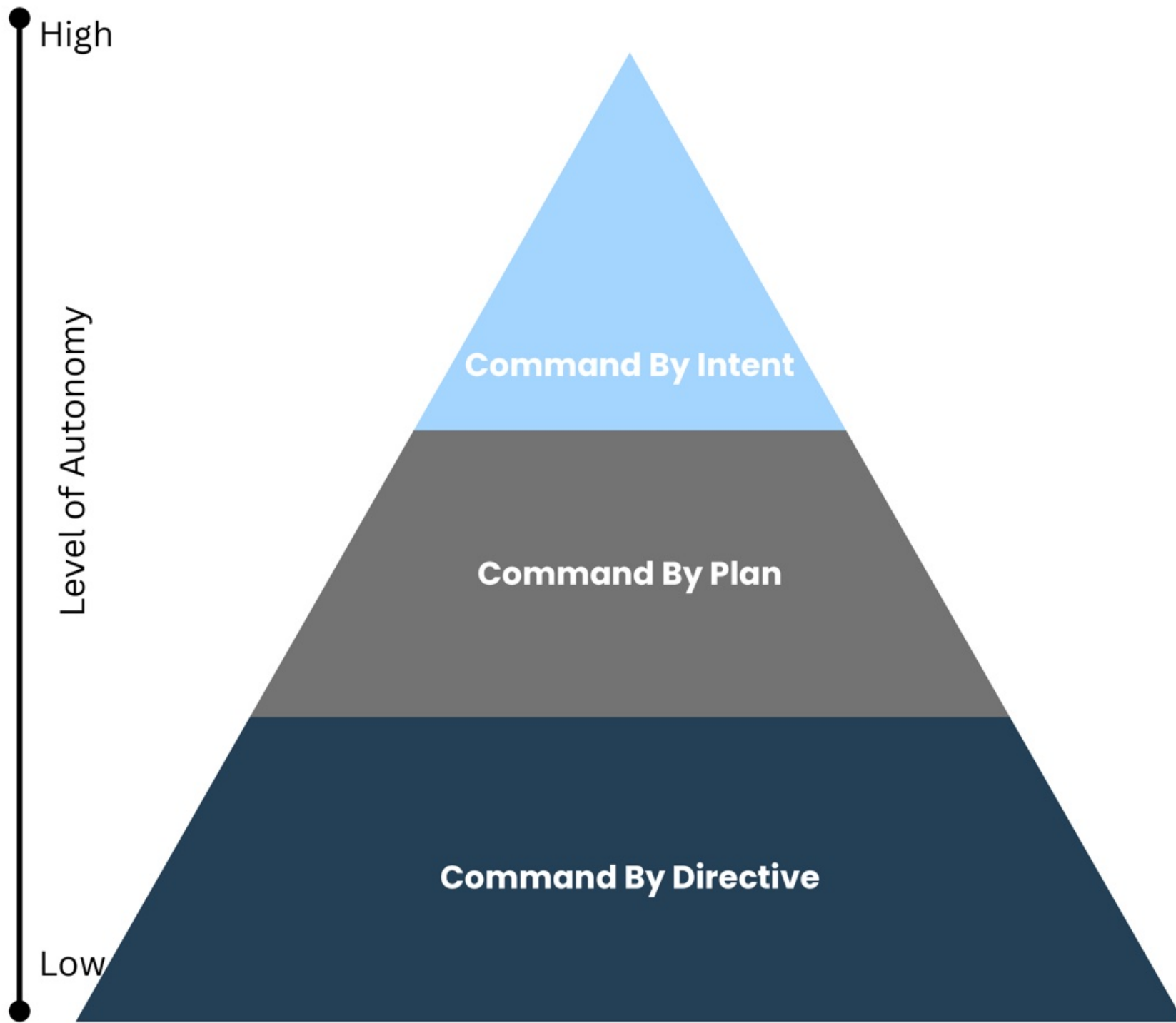
– HARVARD BUSINESS REVIEW



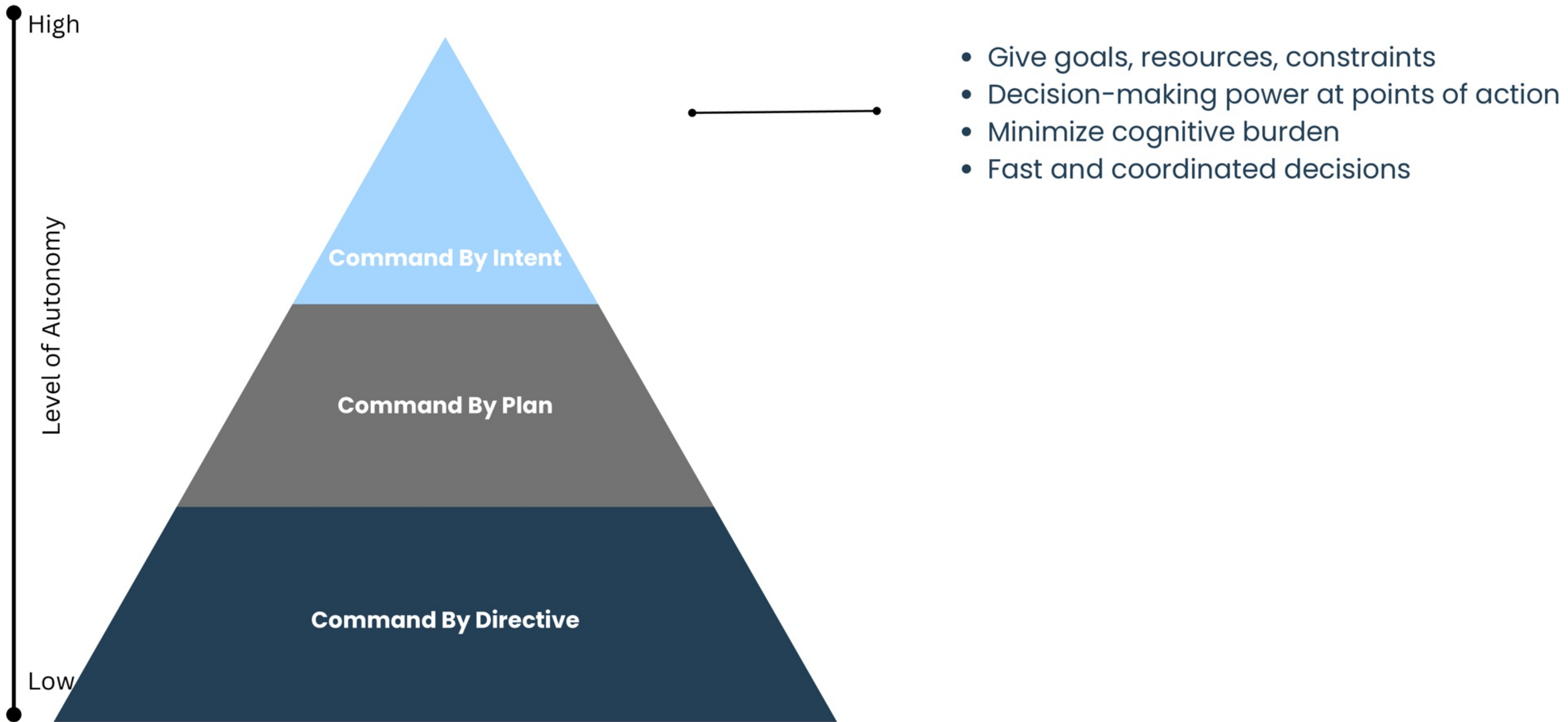
TOOL: COMMANDER'S INTENT



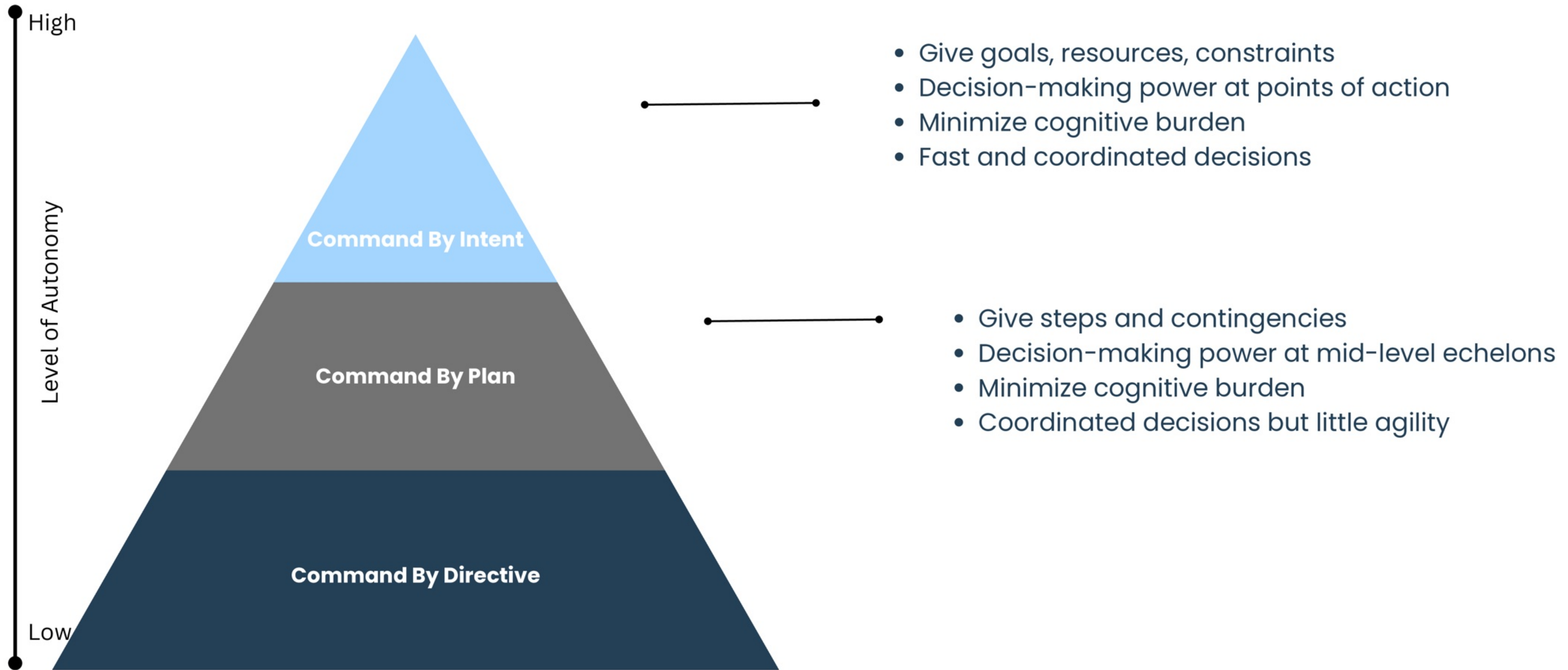
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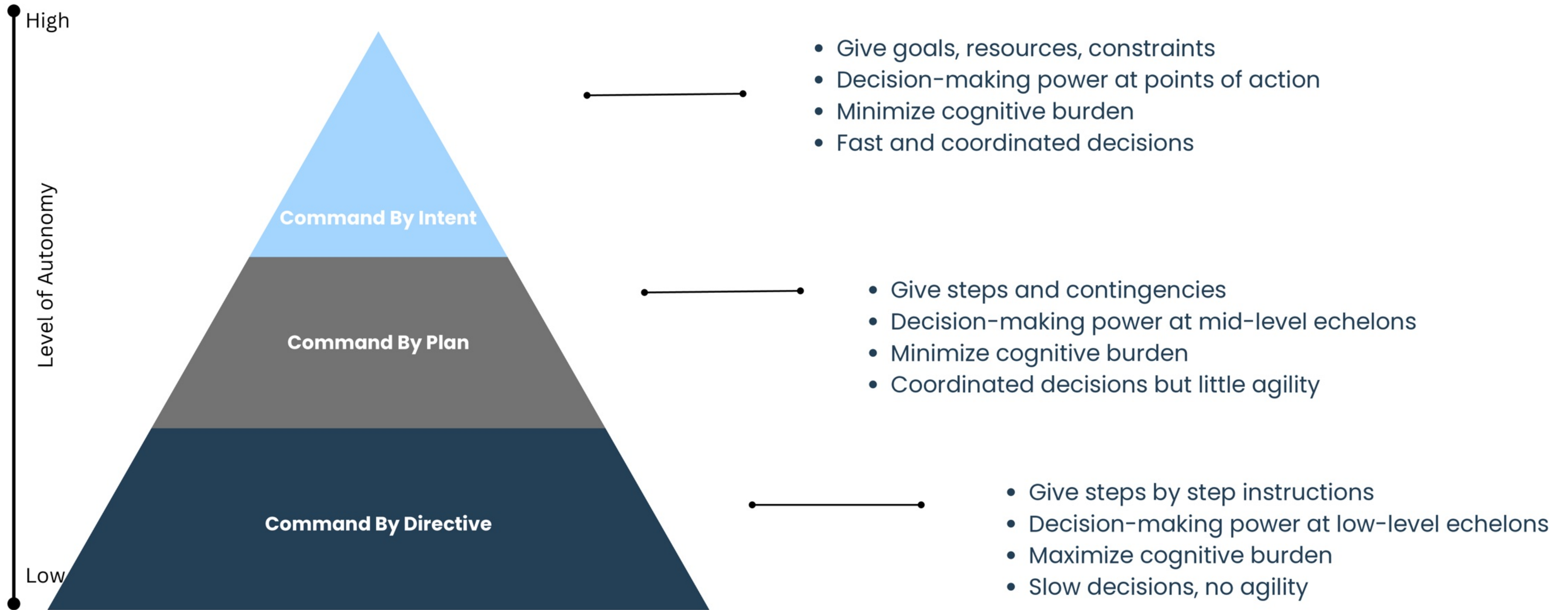
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TOOL: COMMANDER'S INTENT



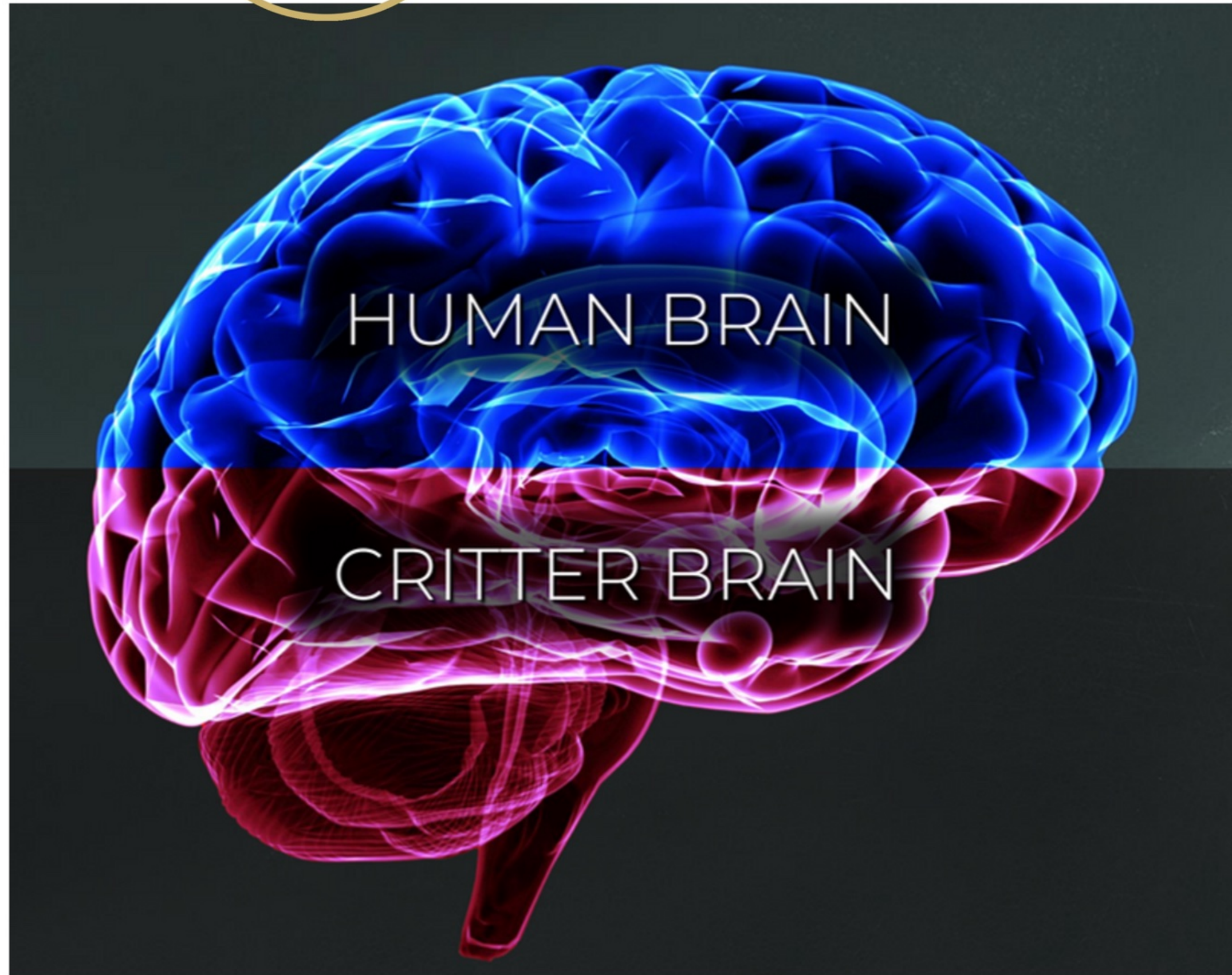




**YOUR CUSTOMERS
WON'T LOVE YOUR
COMPANY UNTIL YOUR
EMPLOYEES LOVE IT FIRST**

”

**People
(customers &
employees) still
make decisions
on the “Critic
Brain”**



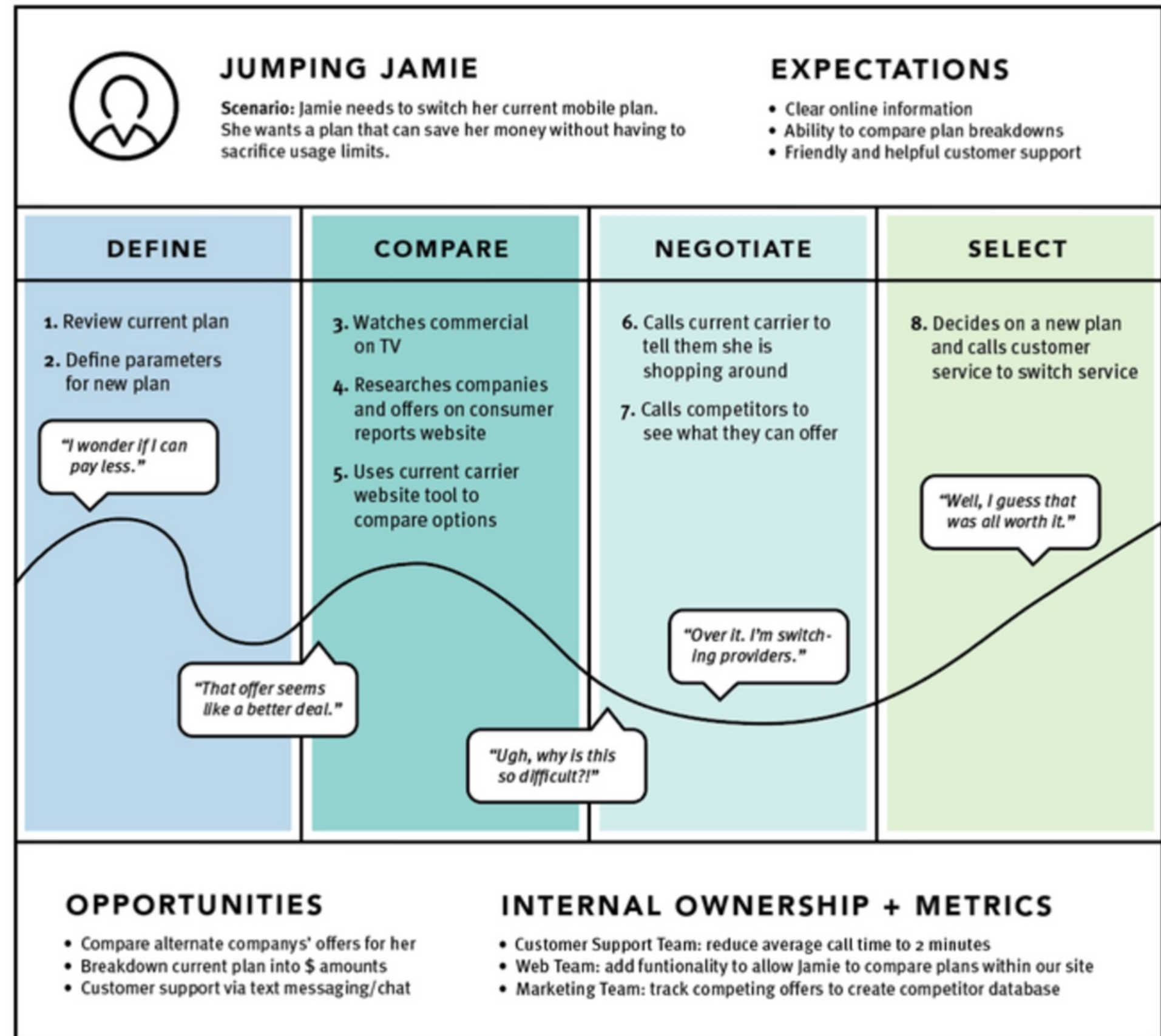
JOURNEY MAP

Takes into account the **customer & employee** in defining processes

Evaluates the **emotional state** of the customer & employee

Find opportunities to turn **interactions** to **loving** interactions

CUSTOMER JOURNEY MAP *Example (Switching Mobile Plans)*





What's Next?

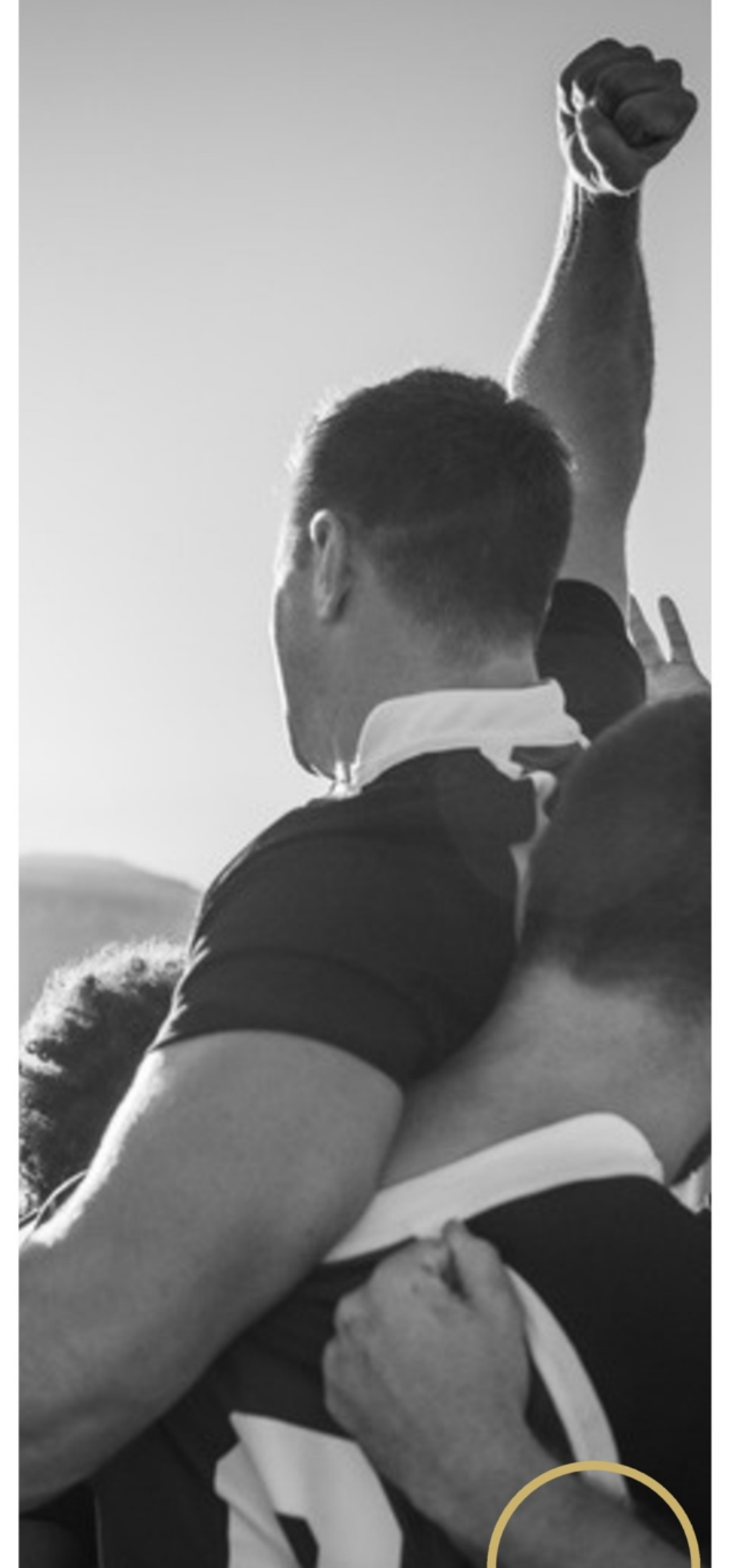


WHAT WAS YOUR A-HA
MOMENT TODAY?



WHAT ONE
COMMITMENT ARE
YOU GOING TO TAKE
TODAY?

AUDACIOUS VISIONS REQUIRE **CHAMPIONSHIP** TEAMS



VISTAGE SPEAKER FEEDBACK

Your feedback is important to everyone in the Vistage community.
Please take a moment to share your feedback about today's session.



LET'S CONNECT



JON CHEN

PARTNERING TO BRING AUDACIOUS TO LIFE



SCAN

FOR TODAY'S RESOURCES AND
TO CONNECT ON LINKED IN

JON@BLUETIDECATALYSTS.COM

781-325-3152