

World-class leadership *in action*

2021 Vistage Member
Excellence Awards

VISTAGE



Dear Vistage members,

Earlier this year, Vistage CEO Sam Reese shared his "Blueprint for World-Class Leadership," exploring lessons learned on his 35-year journey as a business leader. As I read through Sam's fundamental truths, I was struck by the parallels between his wisdom and that of Vistage Member Excellence Award winners.

Their challenges and triumphs, their lessons learned and perspectives gained, are "World-Class Leadership" in action. And that's where the title of this e-book comes from.

In here you'll find stories of bravery. Of perseverance. Of ingenuity in what continues to be an unprecedented time not just for business, but for people. Member Excellence Award winners are leaders who not only perceive the human side of business, they embrace it fully at every turn.

As you continue to make decisions through these unpredictable times, I welcome you to find ideas, find inspiration, and find the strength of your Vistage peer community in these pages. Peruse now, and come back when you need a boost.

As I'm sure you know and feel — leadership is a lifelong journey. May the insights and integrity of these Vistage members be a guidepost when you need it.

Cheers,

Mary Ellen Sheehy

Senior Vice President, Member Programs and Alliances
Vistage Worldwide, Inc.

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What are the Vistage Member Excellence Awards?

Incredible journeys. Inspirational triumphs. Vistage members know no limits.

Amid a mountain of challenges, Vistage members continue to conquer the seemingly impossible. Working harder than ever before. Leading through unprecedented times. Recommitting to the climb with integrity — day in, and day out. These Awards celebrate visionary leaders relentless in their pursuit.



Impact Award

(1-3 years' tenure)

The progress of Vistage's newest members is awe-inspiring. Dedicated new members reach significant heights within their first years, with lasting impact on their company, their group and their community.



Leadership Award

(3+ years' tenure)

What defines a trailblazing leader? Day in, day out — they make a discernible difference that reverberates far beyond their business. Their climb lays the groundwork for the future.



Lifetime Achievement Award

(10+ years' tenure)

These members see no finish line in their pursuit of world class. With a track record of bold decisions benefiting company, community and beyond, they are a beacon to Vistage peers even as they achieve personal greatness.



A CEO's blueprint for world-class leadership

Leadership lessons to build trust, drive purpose, improve culture and foster success.



1

Remember, trust starts with integrity

*“Work ethic is everything ...
If you don’t show up, then you’re
not at the table, your voice isn’t
heard, your constituency isn’t
represented. You have to show up.”*

– Mark Palmer
Lifetime Achievement Award, Seattle, WA



Dr. Marsh Lavenue | Austin, TX

CEO, INTERA

CE 3722 | Chair: Bill LaRosa

Vistage member since 2010

Lifetime Achievement Award

“In my view, the leadership climb speaks to the fact that you’re not only climbing the ranks of a company but also increasing your ability to serve others,” shares Dr. Marsh Lavenue. During his Vistage tenure, Marsh has more than tripled the revenue and profit of his company.

Marsh’s tips:

1. Learn and transform from your mistakes, this is where personal growth begins.
2. Define success paths for each of your people. Paint the picture of “The Possible” so they may rise to the occasion.
3. Be a good steward. Preserve and enhance your company.
4. Practice radical candor. Capital you build with personal connections is the currency that binds you.
5. Be intentional in the core values and behaviors you set for your team, and be accountable.



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Keith Zars | San Antonio, TX

Founder, Keith Zars Pools

CE 3728 | Chair: Charles Marino

Vistage member since 2010

Lifetime Achievement Award

Keith Zars started in the pool building business when he was 10 years old, patching vinyl liners for his family business. At 14, he started balancing the books. In 1985, he went out on his own, and today, Keith Zars Pools is Pool & Spa News’ No. 2 pool builder in the U.S.

Keith has tripled company revenue and achieved record profits since joining Vistage 10 years ago. His lessons learned over 35+ years in business:

1. Not everyone has the same skills, but everyone has a gift.
2. If you’re doing something you’re not happy doing, you’re not going to be as successful.
3. Surround yourself with people who have the skills you lack.
4. Don’t force people into positions they don’t want to be in.

Member reflection

“Are you intentionally showing up every day and coaching your team to do the same, or are you just phoning it in?”

David Drzewiecki
Lifetime Achievement Award,
Las Vegas, NV

“What’s one heavy decision you would make right now, if you weren’t scared?”

Kara Clayton
Impact Award, San Antonio, TX

“What’s your plan to replace yourself?”

Vassar Byrd
Lifetime Achievement Award,
Portland, OR

David Drzewiecki | Las Vegas, NV

CEO, Absolute Dental
CE 4107 | Chair: Tonya Twitchell
Vistage member since 2008
Lifetime Achievement Award

“Are you intentionally showing up every day and coaching your team to do the same, or are you just phoning it in?” For David Drzewiecki, being CEO also means being Chief Encouragement Officer. He faced his greatest leadership test in the onset of the COVID-19 pandemic.

Forced to initially lay off 90% of the workforce, Absolute Dental rebounded in just 6 weeks to reopen all 25 practices, to greater success than ever before. “Sometimes you just have to reset to grow stronger,” David reflects.

David’s lessons learned:

1. Luck is the combination of fact-based decision-making and effective situational leadership.
2. Ultimately, people are resilient. People figure out what needs to be done.
3. Just make the decision. Don’t overthink it.

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Mundy Wilson Piper |

Woodstock, VT

Consultant, Former President and CEO,
Chippers Inc.

CE 647 | Chair: Heather Anderson

Vistage member since 2011

Lifetime Achievement Award

Mundy Wilson Piper never planned to assume the role of president and CEO. Under tragic circumstances, she went forth with the mantra “I have to do right by my people,” achieving her dream of 100% employee ownership on March 1 of this year.

For Mundy, “people first” extends beyond her business. In 2020, she diverted marketing budget to relief funds for the local community. “That turned out to be maybe the best marketing dollars we’ve ever spent,” she shares.

Mundy’s tips for people-first leadership:

1. Junk down, smile up. It isn’t about you.
2. Hold people accountable, but never in a way that messes up their shine.
3. Give direct, honest feedback that helps people achieve their potential.
4. Strengthen your team’s EQ so they may show up as better leaders.

Cody Hewitt | Rochester, NY

CEO, Hewitt Young Electric
CE 4019 | Chair: Scott Gibbs
Vistage member since 2019
Impact Award

Working his way up from the warehouse, when Cody Hewitt assumed leadership of his family business, he did so with a vision — cultivate an organization people would be proud of, and excited to work at.

“Continuous effort leads to massive results,” he says. “The more happiness we have, the more good we’re doing in our organization, ... the more people want to work with us, the better we make their day.”

Cody’s tips:

1. Get your house in order. Know your systems and processes in a way that allows you to functionally get the results you need, while putting your people first.
2. Realize you cannot control everything. Your team members are human beings — you cannot make them do things your way.
3. Embrace a bigger mission than just dollars and cents.

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Member reflection

“One of the leaders that inspires me the most is Jocko Willink. When I read his book ‘Extreme Ownership,’ the concept of 100% personal responsibility was so challenging, but inspiring.”

Holly Moore
Impact Award, Orange County, CA

“The person who most inspires my leadership is Sir Alex Ferguson. One of the world’s best coaches, ever.”

Court Parker
Leadership Award, Atlanta, GA



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Chris Ferris | New Orleans, LA

President and CEO, Fidelity Bank and NOLA Lending Group
CE 5733 | Chair: Jean LaHoste
Vistage member since 2019
Impact Award

“I challenge anyone in a leadership role to find ways to help somebody every day,” says Chris Ferris. Recognized by New Orleans CityBusiness as a “Money Maker,” Chris has driven record profits and helped save 25,000+ jobs through PPP initiatives.

Leaving a successful career in Maryland to raise his children closer to family, Chris says his willingness to take risks based on personal values continues to drive his decisions today. “Trust in yourself, trust in challenges and taking them on,” he advises.

Chris’s learnings:

1. Happiness is possible when your personal values align with your value to an organization.
2. Leadership is an honor, and it means helping others.
3. Don’t be afraid. Look at challenges as an opportunity to learn and grow.

Darren James | Dallas, TX

President, KAI Enterprises
CE 4215 | Chair: Becky Powell-Schwartz
Vistage member since 2015
Leadership Award

As a Dallas - Fort Worth leader, Darren L. James assumed his role with no “preconceived boundaries or barriers,” strategically restructuring a multi-state, 40-year-old company for the next generation of growth.

Reflecting on his leadership climb, Darren shares, “I don’t sell papers, pencils and widgets, I sell a promise and trust. . . . When I can sit across from you and deliver on that promise, then that opens the door to transforming our shared space for what’s coming next.”

Darren’s tips for longevity:

1. Look for projects that will transcend recession.
2. Build solid, non-transactional relationships.
3. “Know the yes is coming.” Stay vision-focused.
4. Learn from everyone you meet.
5. Be authentically engaged in your community. Don’t just fly in and fly out.

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Holly Mazzocca | Cincinnati, OH

President, Bartlett Wealth Management
CE 3615 | Chair: Jean Lauterbach
Vistage member since 2019
Impact Award

Holly Mazzocca has built a career on authenticity and living her values, and helping future leaders do the same. "For me, the leadership challenge was charting a path where I could come as my entire self every day," she reflects.

Driven by self-discovery while pursuing her MBA, Holly made a life-changing leap to Bartlett. Today, she leads a company aligned with her values, putting clients first (for more than 120 years!) with a core of teamwork, honesty and integrity.

Holly's leadership tips:

1. Bring people together to solve problems and deliver solutions based on skillsets, interests and capacity.
2. Put your employees and clients first, and make it central to everything you do.
3. Align your values with your organization. It will sustain you.

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Gabe Kettler | Seattle, WA

CEO, President & Owner, Frontier Door & Cabinet
CE 4807 | Chair: Kevin McKeown
Vistage member since 2020
Impact Award

"There's two options," says Gabe Kettler. "Fight or quit." A CEO first hired to work in the family business at 18 years old, Gabe and his team led the company through the COVID-19 shutdown to a safe and successful year, while also using the company's production capacity to make and donate thousands of PPE face shields for first responders.

"It's scary being a leader sometimes. You come up with this goal or future vision, and in a lot of cases, you've never walked down that path before but you're asking people to follow you," he reflects.

Gabe's advice:

1. Time is your most valuable currency. Treat it as such.
2. Mindset is everything and you're in control of it.
3. If it's not challenging, you're probably on the wrong path.
4. When things are good, don't ease up. It's a trap.

Patrick Patterson | Pittsburgh, PA

Owner, Managing Partner & President, The Level Agency
CE 3780 | Chair: Charles Gounaris
Vistage member since 2018
Impact Award

"Proud, humbled and exhilarated," Patrick Patterson completed a management buyout in Q1 of 2021. Revenues are up 20% over 2020, adjusted EBITDA is up 74%, and turnover has dropped from 100% to 13%.

"When you're building a company, I think it's really important to build a place you actually want to work," Patrick shares. "If you're not laughing with your coworkers ... I don't know why you'd want to come back every day."

Patrick's tips:

1. Stop waiting for the magic formula. You will never be 100% ready to be CEO.
2. True leadership is developed, and it is a mindset.
3. Test, iterate, learn, pivot, persevere. Do it all again tomorrow — only better.
4. Everyone's strategy has been discovered. No one walked in knowing exactly what they'd do in 20 years.

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David Constantine | Chicago, IL
Principal, DCI Insurance
CE 429 | Chair: Mikki Williams
Vistage member since 2019
Impact Award

With an insatiable curiosity, a charitable spirit and a deep desire to improve, David Constantine’s Impact Award is well-earned. He not only grew his business during the pandemic, he has retained every employee while increasing his EOS Organizational Checkup Survey Score by 47% in six months. David has grown as a leader to his family, his employees and his peer group. He is also pioneering a game-changing space in the insurance business by launching proprietary MVP software.

David’s top learnings:

1. Know why you are starting a business and what it stands for.
2. Actively seek advice from others (you don’t have to do it alone).
3. Be the best — be the expert in your field — not just a seller of goods or services.

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Matt Bergmann | Waconia, MN
CEO, Laketown Electric Corporation
CE 5625 | Chair: Dave Heine
Vistage member since 2017
Leadership Award

Matt Bergmann shares, “Every morning, I wake up and think, what can I do to make this a really great place to work?” With inspiring dedication to building a culture people enjoy being a part of, Matt has grown LEC from 12 to 130 employees.

Assuming leadership of LEC after his father’s unexpected passing, Matt has never shied away from showing up and doing the hard work. To him, that is simply a CEO’s job.

Matt’s lessons learned:

1. You can’t do everything. Surround yourself with people smarter than you.
2. Manage based on your team members’ individual motivating factors. If you treat everybody the same, you’ll lose them.
3. Provide exceptional service, and tell the story of your culture and team. Build a reputation that draws clients to you.

Member reflection

“I had a professor in college that asked me a question. ... He said, ‘Are you gonna stick your oar in the water, or are you gonna let the stream take you where it wants?’”

Darren James
Leadership Award, Dallas, TX

“My book collection and the time I spend reading is, and has been, so beneficial to me. Quiet time contemplating has truly changed my life.”

Michael Fiore
Impact Award, Portland, OR

Dylan Jeffress | Berkeley, CA

CEO, Marie Veronique
CE 642 | Chair: Julie Reinganum
Vistage member since 2017
Impact Award

Dylan Jeffress has driven start-up Marie Veronique to 7x growth of the company's top line, while instilling a culture of integrity. "We're doing this because we believe in it," he says, with a vision of translating nature's genius into superior skincare.

Integral to Dylan's success has been balancing growth with building company infrastructure — even if that meant halting new product launches for two years. "It's not just getting the person with the right experience, it's also getting the right person to take you from where you are to where you want to go," he reflects.

Dylan's tips:

1. You can't do everything at once.
2. Hire for the expertise you lack — but don't rush. Do it a bit slower and do it right.
3. Financials are important for sustainability, but aren't the be-all and end-all.



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Jeff Gradek | Chicago, IL

President, Filter Services Illinois
CE 3507 | Chair: Dick Smith
Vistage member since 2011
Lifetime Achievement Award

A lifelong learner committed to development, Jeff Gradek invests in staff training and has built a high-powered leadership team. He has led his company to become one of the largest air filter distributors and service companies in the nation while quadrupling profits over the past decade.

During the pandemic he has profitably pivoted his business to personal protection equipment, high filtration and sanitation, and consulting clients on safe working environments.

Jeff's top learnings as a business leader:

1. Have a clear vision and purpose around a common goal.
2. Stay humble and be vulnerable. You may not be sure how it will turn out, but you will figure it out together.
3. Listen to your team — they know their jobs better than you do.

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Leon SooHoo | Sacramento, CA

President, Paradyme Sound & Vision
CE 5659 | Chair: Brett Sargent
Vistage member since 1996
Lifetime Achievement Award

A first-generation immigrant, Leon SooHoo founded his family business in 1976, and has since served thousands of customers across four decades. He attributes his enduring success as a leader to childhood teachers, traditional upbringing, and ethics.

Capturing his approach, Leon reflects, "When you reach your senior years, can you look back and be proud of your life's accomplishments, with no regrets? Have you earned the respect of your friends, family and colleagues?"

Leon's words of wisdom:

1. The nurturing of youth is critical to their future success in leadership.
2. If you can sell to skeptics, you can sell to anyone.
3. Just be ethical. With suppliers. Customers. Staff. Family.
4. Always seek adjustments to how you approach the market.

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Member reflection

“My first job was my last job and it’s also my current job. At 14 years old, I started working at Cart Mart in the back, washing toilets, taking out the trash and really learning how the business works from the outside in. At 20 years old, I was thrust into a leadership position when my grandfather took ill. It was that moment in time that really set my mind in thinking what leadership needs to be and how I can succeed by leading properly.”

Brian Rott
Lifetime Achievement Award
San Diego, CA



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Dr. Charles Cowap | Cleveland, OH

Founder, Co-President and CEO, Mobile Hyperbaric Centers
CE 5149 | Chair: Mike de Windt
Vistage member since 2020
Impact Award

In the midst of a total transformation of his business, Dr. Charles Cowap remains steadfast in his dedication to having a positive impact on the lives of his team members and patients. MHC has a 95%+ healing success rate!

“I think a big part of my role at this stage is to create opportunities for others,” he shares. “Working with others, I’m able to have an impact that is really fulfilling, can make a big difference for them and improve health care — and as a consequence, bring the most joy to me.”

Charles’ tips:

1. The better you are able to anticipate, the greater your likelihood of success.
2. Cherish relationships. View them as a privilege, an opportunity and a place you can make a difference.
3. Never lose sight of your underlying principles.

Court Parker | Atlanta, GA

CEO, Bug Busters, Inc.
CE 4437 | Chair: Wade Bradley
Vistage member since 2016
Leadership Award

When COVID hit, Court Parker took a trailblazing approach. Confident in the company culture he’d instilled, Court moved operations virtual, implemented field safety and hit the road. He traveled 15,000 miles in an Airstream to glean insights from industry peers, helping to inform his 2021 business model.

Defying the odds, Bug Busters grew 19.38% year-over-year in 2020, completed an acquisition, and improved employee retention to 86%.

Court’s tips:

1. Get out in the field with your people. Build a culture based on mutual respect.
2. Embrace risk. If you’re afraid to take the next steps, that’s when you get hurt.
3. Make sure your people know the roots of your business. Stories build a company.
4. Talk about your failures, or your team’s not going to talk to you.

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2

Treat problem-solving as a team sport

“What enabled us to be successful was we decided we were going to unify and pull together, and that’s exactly what we did. We had to make our own playbook.”

– Tameryn Campbell
Leadership Award, Charlton, MA



Randy Cook | Seattle, WA

Managing Principal, TCF Architecture
 CE 4482 | Chair: Linda Remsberg
 Vistage member since 2017
Leadership Award

At the helm of one of the oldest continuously operating architecture firms in the Northwest, Randy Cook is a 36-year veteran of the architecture industry.

“I really enjoy working with other people and helping them achieve things they never thought they could achieve,” Randy shares, a leader who has prioritized company culture and instilled a “language of character” that has powered a thriving, resilient team.

Randy’s tips:

1. As in whitewater rafting, embrace the adventure and keep paddling.
2. Create a horizontal organizational structure to empower your people.
3. Take time to cultivate relationships. You can’t microwave a good partner.
4. Invest time in the next generation. It takes many projects to become the type of leader a firm needs.

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Jim Swartz | Dallas, TX

President & CEO, CareFlite
 CE 3618 | Chair: Jim Eckelberger
 Vistage member since 2009
Lifetime Achievement Award

Uniting more than 700 employees at 51 bases under one mission, Jim Swartz motivates the lifesaving CareFlite team to make every precious minute count. “The call comes, it’s 2 a.m., it’s raining cats and dogs, and you gotta go right now because somebody’s life is in the balance. And that is a special trust,” he shares.

In 16 years, Jim has grown the 501(c)(3) nonprofit Texas company from \$42M to \$291M, transporting 100,000+ patients per year in partnership with sponsor hospitals. His learnings:

1. Sometimes you must lead from the back.
2. Don’t confuse leadership with management.
3. Successful CEOs have hard and soft skills.
4. Everybody must be accountable for what they do.
5. Do or do not, there is no try. (Yoda)

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Member reflection

“I find levity racing motorcycles. ... When I need a lift, I just get on a bike and take off.”

Elizabeth Waltman
 Leadership Award, San Antonio, TX

“I find levity every day, and I make it my business to do so.”

Dr. Janet Stout
 Leadership Award, Pittsburgh, PA

“I find levity being around my children. They always seem to say the most interesting things at just the right time.”

Chris Ferris
 Impact Award, New Orleans, LA

Ryan Draayer | Las Vegas, NV

Founder & CEO, Hyper Networks
CE 452 | Chair: Clyde Horner
Vistage member since 2018
Impact Award

Ryan Draayer is a serial entrepreneur who faced his greatest leadership test in the onset of COVID-19, his team taking strength in his resolve to never give up.

Ryan shares that whether in your Vistage group, at home or at the office, one must bear in mind there are people invested in your success. By being vulnerable, Ryan found firsthand "You can create bonds no virus or business shutdown can overcome. You can accomplish things you didn't know were possible."

Ryan's other lessons learned:

1. Adversity reveals issues masked by success.
2. A business is a team, not a family.
3. Reinvent, change, be open to adaptability.
4. Leaders must listen, and ask more and better questions.
5. Leadership is about service to others.

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Mark Palmer | Seattle, WA

President & CEO, OBI Seafoods
CE 3241 | Chair: Mike Huse
Vistage member since 2006
Lifetime Achievement Award

Mark Palmer began his career as a driver for Ocean Beauty Seafoods 37 years ago. In his current role of CEO for the past 20, he led the company through a successful merger amid the COVID-19 pandemic.

"You bond under fire," he says, recalling the newly formed OBI Seafoods team's perseverance. "I think COVID really forged that relationship, and that culture, and that ability to work through really, really challenging problems together, as one company."

Mark's tips:

1. There's no going backward.
2. As a new leader, no one expects you to know everything. Admit what you don't know, and learn from others.
3. Work ethic is everything. You have to show up.
4. To keep people on your team long-term, encourage work/life balance.

Tameryn Campbell | Charlton, MA

President & CEO, Masonic Health System
CE 4150 | Chair: Jim Rouse
Vistage member since 2016
Leadership Award

Tameryn Campbell helped transform The Overlook in Charlton, a leading senior living provider, into a financially viable operation. Known for her "Culture of Excellence," post-pandemic, Tameryn is repositioning The Overlook with an exciting vision for the future.

"The pandemic tested us like never before," she reflects. "Every forecast, strategic plan, policy and procedure got tossed in the trash as we were forced to innovate and unpack new ways of operating and protecting our community. It was literally a matter of life and death."

Tameryn's tips:

1. Work hard, assume positive intent, stay hungry and humble.
2. Keep your team in the forefront at all times.
3. Always be curious and strive for continuous learning.
4. Adversity fosters resilience, creativity and new opportunities.

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Member reflection

“The person who most inspires my leadership is the director of development here at Hospice Austin. She’s extremely positive, extremely hardworking and builds up everyone around her. ... She makes everyone else a success.”

Marjorie Mulanax
Leadership Award, Austin, TX

“The person who most inspires my leadership is John Wooden, the great UCLA basketball coach. His philosophy was to treat people well, be unselfish, do the little things correctly, and focus on getting better each day.”

John Marten
Lifetime Achievement Award,
Cincinnati, OH



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Steve White | Buffalo, NY

Founder & CEO, RentPrep
CE 4996 | Chair: Michael LaMancuso
Vistage member since 2019
Impact Award

“Sometimes challenges, setbacks or seeming failures end up being the fuel you need to keep pushing,” says Steve White. Founder & CEO of the leading tenant screening solution trusted by 100,000+ landlords, Steve is a retired U.S. Marine whose leadership earned his company the top spot in its industry on the 2020 Inc. 5000.

Quick to credit the strength of his team when reflecting on his company’s greatest achievements, Steve shares these leadership tips:

1. Invest in professional development. Build confidence in your team to drive bigger goals for your business.
2. Be transparent about your mistakes. Inspire perseverance by ensuring your team knows setbacks make you stronger.
3. Be clear in your vision, and make sure your senior leaders share that clarity.

Connor McMahan | Philadelphia, PA

Partner, L2 Capital Partners
CE 341 | Chair: Carol Steinberg
Vistage member since 2019
Impact Award

“Building a team is hard. Being a leader is hard. At the end of the day, it really does come down to alignment and time — and figuring out what drives people,” Connor McMahan reflects.

Connor provides flexible capital to business services and consumer product companies and encourages his investments adopt internal growth strategies that mitigate complacency. He explains, “Our firm and portfolio companies embrace a dynamic growth process that resets expectations each year. When people are driving toward breakthrough growth, it’s amazing how much progress occurs.”

Connor’s tips:

1. Recognize different things drive people to work to their best.
2. Build an organization that is not dependent on one person.
3. Put talent in place before you need it.

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John Faust | Pottstown, PA

President & CEO, Diamond Credit Union
CE 3765 | Chair: Joni Naugle
Vistage member since 2011
Leadership Award

Since joining Vistage, John Faust has grown his company's assets by 116%, its membership by 61%, and its team of employees by 68%, with a spot on the PA "Best Places to Work" list the past five years.

"Even the shortest-tenured member of our executive leadership team has 10 years of service with us," John shares. With a core team that has in fact remained the same for three decades, he looks to company culture as a source of this longevity.

John's lessons from 30 years as CEO:

1. Success breeds the momentum of confidence.
2. You never know what kind of team you have until you've faced adversity.
3. Appreciate change to embrace growth.
4. Be open to learning, no matter the subject.
5. Surround yourself with smart people.
6. Never be satisfied.



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Michele Lex | Napa, CA

President & CMO, The Perfect Purée of Napa Valley
CE 4505 | Chair: Paul Nobmann
Vistage member since 2016
Leadership Award

Bucking a traditional food service sales model, Michele Lex has taken The Perfect Purée of Napa Valley from \$18.7M in 2015 to \$29M in 2019 (a 54% increase), rebounding with a solid growth pattern after the slowdown of 2020.

She explains, "The reason we've grown is engagement and customer relationship management. It's a great product, but at the end of the day ... it's people knowing people."

Michele's innovative sales tips:

1. Amplify what you do best, even if it's a break from the norm.
2. Understand who you are as a brand.
3. Find the balance between offering a solution (a typical sales proposition) and listening. Sell without them knowing you're selling.
4. In any marketing strategy, metrics are the cornerstone.

Butch Fiore | Denver, CO

President, Fiore & Sons
CE 569 | Chair: Bob Carrothers
Vistage member since 2008
Leadership Award

Butch Fiore is third-generation president of Fiore & Sons, a civil contractor renowned for its excellence, integrity and quality of work. Joining the family business at 16 years of age, since Butch assumed the role of president the company has grown from \$65M to \$100M+, with record growth achieved through the COVID-19 pandemic.

"In the last eight years, I've really worked hard to change the culture of the organization," he reflects. "We realized we had to shift to an 'everyone takes ownership model' vs. individuals going out and just working hard."

Butch's tips:

1. Goals are milestones, not stopping points.
2. Don't be afraid to tell people the truth.
3. You are the model others will follow. There is power in the stories you create.

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Devlin Liles | Houston, TX

President, Improving - Houston
SB 2558 | Chair: Ken Proctor
Vistage member since 2017
Leadership Award

Devlin Liles once thought with an Excel sheet big enough, he could solve the world. Embracing the power of team, Devlin is now renowned for the culture he’s instilled, a leader invested in the path of every employee.

“I know the investment of time and emotion is going to pay off in the long term, because regardless of how it lands, I got to share this part of life and achievement and accomplishments with them,” he reflects.

Devlin’s advice:

1. Your leadership ability dictates the level of achievement your team can reach.
2. Vulnerability is strength, not weakness.
3. Growth is a constant. The more aware you become, the more you see your flaws. The journey is never-ending.
4. Be suspicious of those who think they have it all figured out.



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Kevin Forristall | Treynor, IA

President, TS Banking Group
CE 5862 | Chair: Rick Faber
Vistage member since 2019
Impact Award

Assuming the role of TS Banking Group president during the pandemic, Kevin Forristall has secured company-saving PPP loans for legacy customers and Vistage companies, has led two bank mergers, and has led a wealth management acquisition — all while helping homeschool his four children.

Kevin has grown his company, his community and himself. In the process, he’s encouraged his leadership team to shine. “There’s something to lifting others up that helps to lift ourselves up as well,” he reflects.

Kevin’s tips:

1. Be honest and transparent about your strengths and weaknesses. Often the advice you’re giving, is the advice you need to hear yourself.
2. In challenging times, celebrate the wins.
3. Help people find the meaning in the work.

Member reflection

“My first job was sacking groceries at the local supermarket. My leadership climb really began halfway into starting a business and realizing I needed help.”

Chase McAnulty
Leadership Award, Kansas City, MO

“My first job was when I was 13, mowing lawns, saving money for the company that I began.”

– John Christian Williams
Leadership Award, New Orleans, LA

Member reflection

“A learning experience that changed my life was moving across the country when I was 15. It really taught me to get out of my comfort zone, and I’m comfortable with that now.”

Jake Crocker
Leadership Award, Cleveland, OH

“My father was an entrepreneur, and watching him struggle, grow and succeed was life-changing for me. ... He always preached to me his ‘three P’s’: if you have patience, perseverance and perspiration, you’ll eventually be successful.”

Peter Feil
Leadership Award, Cincinnati, OH



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Judy Paul | New York, NY

CEO, North Square Restaurant and the Washington Square Hotel
CE 381 | Chair: Mark Taylor
Vistage member since 1998
Lifetime Achievement Award

With 28 years as CEO, and 24 years as a Vistage member, Judy Paul has persevered through COVID’s deep personal and professional toll to return to 70% hotel occupancy.

“It’s taken my entire strength to just keep it going,” she shares. With hundreds of hotels and restaurants shuttered, Judy learned to live with uncertainty. She focused on survival, endured sleepless nights, and embraced the determination of her team. An anomaly for the industry, and a testament to her values-driven leadership, many employees have been with her for decades.

Judy’s top-two tips:

1. Break new initiatives into manageable pieces — what you need to do today, tomorrow, next week.
2. Create your own future. Build a strong peer network and team to see you through hard times.

Don Murphy | Birmingham, AL

CEO and Founding Member, BMSS
CE 4006 | Chair: Frank Day
Vistage member since 2019
Impact Award

Don Murphy grew the CPA firm he helped found from a small regional outfit to one of the largest, most respected firms in Alabama, with multiple locations and several value-add companies now under the BMSS umbrella.

All that growth — coupled with the pandemic — could spell doom to company culture. Instead, under Don’s leadership, communication increased, workplace bonds strengthened, and a cohesive vision and direction emerged. “The pandemic made us sharpen our pencil on a lot of things,” he explains. “We’re running our business a whole lot better.”

Don’s learnings:

1. Consider culture fit when planning a merger.
2. Retreats and occasional in-person interactions help remote working plans succeed.
3. Where there is crisis, there is opportunity.

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3

Delegate to build trust and accountability

“I know it sounds cliché, but hire people smarter than you, and don’t micromanage them.”

– Tripp Davis
Leadership Award, Philadelphia, PA



Jennie Campbell | New Orleans, LA
 President & CEO, Stewart Steelwood Investments, LLC
 SB 264 | Chair: Arthur Mears
 Vistage member since 2006
Lifetime Achievement Award

Leadership roles on 100+ boards. Feature in 100+ publications. \$5M+ raised for charity. Reflecting on her leadership climb, Jennie Campbell shares, "If we can move the emotion out of change and let ourselves step back and be grateful for where we are, it's amazing. ... Nine times out of 10, that's when we see people really grow and excel."

Jennie's tips:

1. Be prepared, not blindsided. Understand the numbers and politics of your business.
2. Be the solution-finder. Even if you have to dig really deep, don't give up.
3. How you lead at the top will trickle down to how you lead at the bottom.
4. Business is about people and connection. Lack of trust comes from lack of communication.
5. Be a decisive decision-maker. Stick to it until somebody can convince you differently.

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Doug Staley | Orange County, CA
 President, Hunsaker & Associates
 CE 28 | Chair: Larry Cassidy
 Vistage member since 2010
Leadership Award

"I think the biggest challenge has been to stay flexible and fluid and understand there's going to be changes along the way," reflects Doug Staley. With H&A from 1980, Doug, along with his partners, led through the Great Recession and now through the current pandemic, turning H&A into a sought-after employer of top talent.

"With 195 employees, we're trying to do what's best to keep everybody safe, so they feel comfortable ... and still have the ability to take care of our clients," he shares.

Doug's tips for a thriving remote workforce:

1. Cultivate up-and-coming talent. Believe in their ability to lead.
2. Schedule regular interdepartmental meetings.
3. Make sure senior leaders meet weekly.
4. Stay true to your culture, and give credit where credit is due.

Juergen Seybold | Charlotte, NC
 President, Lutze Inc.
 CE 98 | Chair: Terry Dunn
 Vistage member since 2004
Lifetime Achievement Award

As an engineer, Juergen Seybold likes to figure things out. What's the fastest way to tie your shoes? To manufacture a part? To get to the C-suite? The answer to that last question was education — Juergen accepted a life-changing engineering apprenticeship in Germany at 16 years old, and has been an active member of Vistage since 2004.

Juergen's experience prepared him to take over Lutze Inc., a once break-even company now generating \$50M and 8%+ in EBIT. Under Juergen's visionary leadership, Lutze is expanding ownership of the supply chain and investing in its management team to pay his good fortune forward.

Juergen's tips:

1. Take vacations.
2. Develop people to contribute to society.
3. Say no to things that don't move you forward.

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Jeff Meyer | Buffalo, NY

President & CEO, Baillie Lumber Co.
CE 337 | Chair: Sharon Randaccio
Vistage member since 2007
Lifetime Achievement Award

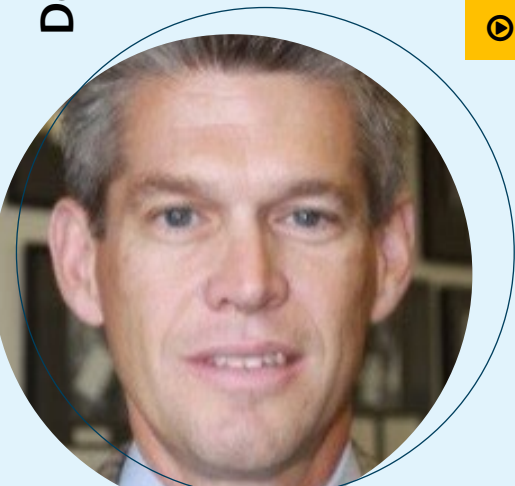
CEO of Baillie Lumber Co. for nearly 20 years, Jeff Meyer has led through such challenges as the Great Recession, 2019's China tariffs, and the COVID-19 pandemic, taking a long-view approach to crisis response that has allowed his company to endure and thrive.

Jeff is fueled by accountability to his people, and is driven to ensure he not only keeps the business going through difficult times but keeps it thriving.

Jeff's tips for leading through crisis:

1. There's not one roadmap. Use your judgment, look at the situation, see what's right for that particular circumstance and your company.
2. It's not just about making it through — how are you setting yourself up for the future?
3. Always bear in mind, crisis creates opportunity.

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Elizabeth Waltman |

San Antonio, TX

COO, South Texas Blood and Tissue Center
CE 3867 | Chair: Charles Marino
Vistage member since 2014
Leadership Award

A pioneer in the blood bank industry, Elizabeth Waltman led South Texas Blood and Tissue Center to record performance in 2020, also spearheading donation of lifesaving convalescent plasma from recovered COVID patients.

The achievement builds on Elizabeth's prior accomplishment of making low titer O+ whole blood available for pre-hospital usage for the first time in the U.S. civilian world. She explains, "Those precious minutes mean the difference between life and death."

Elizabeth's tips:

1. Expedite execution by getting the right people at the table early on.
2. Don't give up. The answer is never no — you may not know right now, but you will figure it out.
3. Look down uncommon paths. You may find incredible opportunities.

Member reflection

“Everybody has different strengths and different methods to their madness. Understanding who you are and surrounding yourself with people that are complementary — rather than carbon copies of you — is extremely valuable.”

Mark Botos
Lifetime Achievement Award
Pittsburgh, PA

“You and only you control your own mindset. You have the power to un-stub your toe.”

Gabe Kettler
Impact Award, Seattle, WA

Kara Clayton | San Antonio, TX

President & Owner, Express Contracting
 SB 2834 | Chair: Amy Childs
 Vistage member since 2019
Impact Award

Kara Clayton has grown Express Contracting from \$7M to \$30M+ in 5.5 years, winning its largest contract to date amid the pandemic.

“When I reflect on my leadership climb, the achievement that stands out most is doubling down on investing in our team’s growth and future, and particularly in its engagement,” Kara shares. “I ask them to give it their best, whatever their best is for today.”

Kara’s tips:

1. Leadership isn’t just about results. It’s about taking care of the people responsible for the results.
2. Find a safe space to put your armor down and speak your truth. Remain true to who you are while staying open to other perspectives.
3. Enhance your circle of influence, especially with those who want to see you succeed and will be there for you when you fail.

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Justin Chase | Tempe, AZ

President/CEO, Crisis Response Network
 CE 5770 | Chair: Fred Carpenter
 Vistage member since 2018
Impact Award

Justin Chase anchors his leadership climb in not shying away from exceptionally challenging circumstances. Under Justin’s leadership, CRN is on call 24/7/365 — with a staff of 300+ Inspiring Hope when and for whom it is most needed.

“I didn’t set out on my growth journey saying, ‘You know what, at the end of the day I want to be a CEO,’” Justin shares. “I just wanted to make a difference.”

Justin’s tips for difference-making leadership:

1. Your frontline staff are the ambassadors of your organization. Make sure they feel supported, they’re engaged, and they’re fulfilling a mission.
2. Knowing you’ve set your team up for success, have confidence in its ability to execute.
3. In all endeavors, have a compassionate heart.

Michael Fiore | Portland, OR

Operations Manager, Oregon Feralloy Partners
 CE 4438 | Chair: Will Moore
 Vistage member since 2018
Impact Award

When COVID-19 prompted a 75% drop in revenue, Michael Fiore restructured his leadership team, reshaped his company, and moved forward with 4x the output of when he began. A true servant leader, he takes a deeply introspective approach to building authentic relationships for his company’s continued success.

Michael’s relationship-building tips:

1. Ask better questions, starting with asking yourself: How patient do I want to be? How vulnerable do I want to be? How badly do I want to be a leader, versus being a boss?
2. See the relationship as an opportunity, not an impediment.
3. Think about how you are perceived.
4. Allow relationships to move at their own pace.
5. Prioritize emotional safety. Mistakes are an opportunity to get better.

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Member reflection

“Have you communicated a path for success for your people?”

Dr. Marsh Lavenue
Lifetime Achievement Award, Austin, TX

“What strategy have you put in place to ensure diversity in your organization?”

Mark Palmer
Lifetime Achievement Award, Seattle, WA

“What was your most difficult leadership experience, and how did you navigate through it?”

Kevin Forristall
Impact Award, Treynor, IA



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Tom Kammerait | Milwaukee, WI

Managing Partner/Attorney-at-Law,
von Briesen & Roper, s.c.
CE 5 | Chair: David Hildreth
Vistage member since 1999
Lifetime Achievement Award

Tom Kammerait led his firm to double in size five years ago, driven by a principle of giving people freedom not often found at other firms. “We don’t use the word no. ... It’s never yes or no. It’s how,” he shares.

An attorney-at-law as well as a CPA, Tom has managed 275+ business succession plans and business purchase or sale transactions, and has been a Vistage member for 22 years. In 2018, he also became a Vistage speaker.

Tom’s tips:

1. If you’re doing something and it’s not working, stop now, and then focus on what is working.
2. Work only on things that add value; if you’re not confident you’re doing so, no one else will think so either.
3. Mistakes are valuable; use them to learn and grow and don’t make the same one twice.

Peter Feil | Cincinnati, OH

General Manager, STOBBER Drives Inc.
CE 470 | Chair: Carolyn Washburn
Vistage member since 2014
Leadership Award

Peter Feil has empowered his leadership team to run the business without him, freeing him to pursue his passion: developing its culture and next level of leaders. Devoting 20 years to implementing a cultural transformation at STOBBER, Peter has embraced the journey. “My goal was always a culture where people were empowered, proud, achieving, working together,” he reflects. “It was their success, not my success.”

Peter’s lessons learned:

1. Treat people as you wish to be treated.
2. Think big picture. There is no silver bullet.
3. If you put your team members first, they will put you first, and they will put your customers first.
4. Within minutes of walking through your doors, your company culture is perceptible.
5. Leadership means learning as you go.

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Scott Wendelburg |

Menomonee Falls, WI

Owner & CEO, Winco Stamping Inc.
CE 4963 | Chair: Liza LeClaire
Vistage member since 2017
Impact Award

“The easy answer is, I don’t like to fail,” reflects Scott Wendelburg. Assuming ownership of Winco under unforeseen circumstances, Scott faced such hurdles as \$2.2M of debt and a legacy of authoritarian rule. Four years later, the business is debt-free and thriving.

“For so many years, I was the answer,” Scott says. “I did every review, every question came to me, every decision was me — that’s not a sustainable model.”

Scott led Winco’s climb back by leveraging EOS, as well as:

1. Building an affable team that could do the things he could not, freeing him up to work on the future of the business.
2. Leading without fear of the tough decisions.
3. Staying focused on doing the work to reach the light at the end of the tunnel.

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Michael White | Woburn, MA

COO, ACP Facility Services
CE 5845 | Chair: Nancy Babine Kucinski
Vistage member since 2019
Impact Award

Relearned how to read following a dyslexia diagnosis in high school. Became the youngest GM in Dish Network history. Grew ACP profits by 450% — in 2020. Michael White has spent a lifetime defying the odds, and all who’ve doubted him along the way.

“It’s when you think it can’t be done, that I want to do it,” he shares.

Working on the business vs. in it is Michael’s latest victory. With the support of his Vistage group, where he was once involved in every decision, he’s successfully begun delegating. His tips:

1. Don’t settle. Don’t doubt yourself. Continually push to be better.
2. But, find the balance. Set realistic goals, and do not be consumed by their pursuit.
3. Find a support system you can count on.
4. Use “no” as motivation.

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Bob Forbes | Englewood, CO

President & Founder, Forbes M+A Group
CE 97 | Chair: Karen Meehan
Vistage member since 2010
Lifetime Achievement Award

Bob Forbes has led 150+ corporate finance transactions, and has developed a culture of trust and caring unique in the investment banking industry.

“When I think back on the leadership climb, an achievement that really stands out is the first big engagement my company won with zero help from me,” he reflects. “I was no longer the constraint on our growth.”

Bob’s tips for transitioning to working on the business, not just in it:

1. Fully commit to crossing the chasm. Take risks, let things break, let people fail.
2. Find out what each person in your company really wants in their life and help them get it. It’s amazing how they’ll help you in return.

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4

Follow purpose as your North Star

*“Once I went toward the
thing that was burning me up, all
the doors just opened.”*

– Vassar Byrd
Lifetime Achievement Award, Portland, OR



Jeffery Crabb | Dallas, TX

CEO, Diamond C Trailers
CE 3082 | Chair: Ed Burke
Vistage member since 2018
Impact Award

"The dream of what could be drove me to persevere," Jeffery Crabb shares, reflecting on his leadership climb. CEO of his family business for 20 years, Jeffery has led his company to \$100M+ in sales, 500+ team members and 200 dealer partners nationwide — making it one of the fastest-growing companies in the trailer industry.

Jeffery's lessons learned:

1. If you want to accomplish extraordinary things and inspire your team, you must have a purpose bigger than yourself.
2. Find a careful balance between current reality and what's possible. Don't get bogged down by the constraints of the day.
3. You can't do it alone. In building an extraordinary organization, you must have a core team you fully trust, that understands your heart, soul and purpose.

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Erin Anderson | Boise, ID

Executive Director, Idaho Botanical Garden
CE 4097 | Chair: Ron Gambassi
Vistage member since 2018
Impact Award

Tenacity. Grace. Integrity. These are the words peers use to describe Erin Anderson. Amid extreme revenue loss in 2020, Erin's leadership kept the doors of the Idaho Botanical Garden open, securing the key partners and community support needed to save a Boise icon.

With almost 20 years of nonprofit experience, it was not Erin's first time leading through adversity. As executive director of Boise Urban Gardens School, she saw a major capital raise spiral into near disaster. Invigorated by purpose, she drove the renovation project quite literally out of the rubble.

Erin's learnings:

1. Start with optimism.
2. Lay out the plans. There's plan A — then there's B, C, D, E and F.
3. Surround yourself with experienced people you trust.

Jim Schultz | Lancaster, PA

President & Founder, Applied Educational Systems
CE 349 | Chair: Shaun Balani
Vistage member since 2013
Impact Award

In 2012, Jim Schultz went from \$10M to zero overnight — on purpose. Though painful in the short term, reinvention was imperative to AES' longevity. In 2019, Jim's efforts saw him named "Entrepreneur of the Year" by the Lancaster Chamber of Commerce.

As founder and president of AES, Jim helps administrators and teachers have more time to connect with and empower students to become lifelong learners. Reflecting on the challenging innovation to a SaaS business, Jim says, "If you know you're doing the right thing, it gives you hope... it just requires a lot of patience and a lot of grit."

Jim's top three tips:

1. Don't be afraid to fail, and don't give up.
2. Innovation is a lot of little incremental experiments.
3. A good support system is critical.

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Marjorie Mulanax | Austin, TX

Executive Director, Hospice Austin
CE 4678 | Chair: Dick Sanger
Vistage member since 2017
Leadership Award

In 27 years as executive director, Marjorie Mulanax has guided Hospice Austin's growth from serving 300 patients per year, to serving 2,500 — increasing operating budget from \$2M to \$30M. Today, Hospice Austin is one of the largest nonprofit hospices in Texas.

In what she calls "a miraculous time in my career," Marjorie also shepherded the 1997 purchase of Christopher House, a small AIDS hospital that she transformed into the region's first and only community inpatient hospice facility, raising \$1M in less than three months to do so.

Marjorie's tips:

1. Just jump in and start. You may not know the exact path, but action is vital.
2. Obstacles are opportunities in disguise.
3. Let others help you.
4. Don't let the detractors get you down. Don't roll over.

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Steve Adkins | Brookfield, WI

Chief Storyteller, CornerStone One
SB 48 | Chair: Matt Mielke
Vistage member since 2012
Leadership Award

From his garage to \$45M in revenue, Steve Adkins has remained grounded in purpose. "We champion people over profits every single day," he shares, his business one of the industry's fastest growing in southeastern Wisconsin.

CornerStone was born when a mentor took a chance on Steve 18 years ago. "That shaped my whole career," he reflects. "From that moment, I learned the lesson of believing and seeing the potential in people and making myself accountable, not only with my time, but with my resources to invest in people."

Steve's tips:

1. Clear is kind, unclear is unkind. Communicate your mission, vision, values and expectations.
2. With these "guardrails," give people autonomy.
3. Make sure you are leading with love for everybody in the organization.

Member reflection

"My first job was sweeping floors at a glass fabricating plant, but my climb to leadership started when I entered kindergarten."

Kris Vockler
Leadership Award, Portland, OR

"My leadership climb began at my first job at a lawn and garden center, where I literally had to climb to the top of a greenhouse to coordinate the installation of a new 10,000-square-foot roof."

David Constantine
Impact Award, Chicago, IL

Mike Rydin | Houston, TX

CEO, HCSS

SB 812 | Chair: Robin Stanaland

Vistage member since 1996

Lifetime Achievement Award

Founded in his home 35 years ago, 40,000+ construction professionals across 4,000+ companies now use Mike Rydin's HCSS software each day. A "Best Place to Work in Texas" for 14 consecutive years, HCSS' 200+ employees are powered by Mike's people-first, always-learning, "growth is fun" ethos.

A Vistage member for 25 years, Mike offers these tips:

1. No one should be indispensable.
2. Those that get you to a certain level of success may be impediments to the next.
3. If you're in charge, you bear responsibility for your leadership team.
4. Establish a "helpful culture." Customer service applies to employees as well.
5. Perception vs. reality doesn't matter. You must handle the situation.
6. In difficult conversations, arm yourself with objective data.



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Rhys Wilson | Atlanta, GA

Co-Chair of Mergers & Acquisitions, Nelson

Mullins Riley & Scarborough LLP

CE 155 | Chair: Jay McDonald

Vistage member since 1996

Lifetime Achievement Award

With a career spanning over 40 years and hundreds of deals, Rhys Wilson leads his law firm's multibillion-dollar M&A practice. He gives back to the community by serving as board chair of The Atlanta Opera and as an active supporter of Children's Healthcare of Atlanta.

Rhys led The Atlanta Opera through 2020, taking fast, dramatic action to protect the company's finances while continuing safe live performances and reaching an international audience as never before.

Rhys' tips:

1. Accept reality. With mission, vision and values as your guide, make the best decision you can.
2. Don't "wait and see." By the time you have "perfect" information, your window of opportunity will have closed.
3. Communicate your decision, rally your team and act boldly. Turn a crisis into opportunity.

Dr. Katherine McGrady |

Arlington, VA

President & CEO, CNA

CE 4222 | Chair: Debbie Tyler

Vistage member since 2016

Leadership Award

"Leadership begins when something makes you uncomfortable, and you do it anyway because of your convictions," reflects Dr. Katherine McGrady, drawing on the courage of her own through deployments in the Persian Gulf and Mogadishu.

Recognized with the Department of the Navy's Superior Public Service Award, Katherine's tenure at CNA spans 33 years, during which time she's provided analysis in support of military and government leaders to help them make the best decisions possible.

Katherine's tips:

1. Stop worrying about things you can't control.
2. If you're not making mistakes, you're being too safe.
3. Leadership is a lot like mountain climbing. It's windy at the top.
4. You are who you are, no matter your role.
5. Stay out of your head and focused on the mission.



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Member reflection

“A learning experience that really changed my life was being only a mile and a half from Ground Zero. ... That day and the after-effects drove home the point that nothing is constant. No matter how much we plan for the future, there are situations we simply cannot control.”

Judy Paul
Lifetime Achievement Award,
New York, NY

“One experience that has changed my life and how I lead people really has been understanding how to lead with love.”

Steve Adkins
Leadership Award, Brookfield, WI



Ian Northrop | Alexandria, VA
CEO, JHNA
CE 4222 | Chair: Debbie Tyler
Vistage member since 2019
Impact Award

“He questions, he changes, he leads, people follow,” a Vistage peer shares of Ian Northrop. “How many intelligence officer-Army veteran-Harvard MBA-West Point grad-CEOs do you know?” In the 10 years since he joined his father’s small consulting firm, Ian overhauled JHNA into a 150-employee, digital engineering powerhouse, a WBJ “75 Fastest Growing Companies in 2020” and “Best Place to Work” for the last five years.

“I feel like every day I learn something new,” Ian reflects, driven by self-improvement and a desire to inspire his teammates to be their best.

Ian’s tips for leading a family business:

1. Plan proactively for the founder’s dilemma.
2. Determine the equity split as early as possible.
3. Focus on the benefits as much as the challenges. Stop to enjoy it!

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Brad Avrit | Los Angeles, CA

President, WEXCO International Corp.
CE 5880 | Chair: Michal Clements
Vistage member since 2016
Leadership Award

Starting at WEXCO just out of college, and now with the company 30 years, Brad Avrit was instrumental in its pivot from construction management to the forefront of building one of the largest forensic engineering firms in the U.S.

Under Brad’s leadership, WEXCO has successfully grown to \$25M in revenues in 2021, with consistent 45%+ gross margins, reinvesting \$1M in 2020 to prevent employee layoffs and preserve the team. WEXCO was independent until 2019, growing from approximately \$5M in 2016, when Brad joined Vistage, to \$22M in 2020.

Brad’s tips for leadership longevity:

1. Commit to your core competency, and grow from there.
2. Make time to work ON your business, not just in it.
3. Prioritize a balanced life.
4. Be a leader others would seek to emulate.

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Ben Smith | Atlanta, GA

President, Majors Management
 CE 3850 | Chair: Jay McDonald
 Vistage member since 2018
Impact Award

“Everything relates back to your business,” Ben Smith shares. Guiding a transition from family-owned business to business that “just happens to be owned by a family,” under Ben’s watch, Majors now owns, leases and supplies 900+ gas station and convenience stores across the Southern U.S.

“I think my biggest accomplishment is building and empowering the leadership team to make decisions, and giving them the tools and people to do that,” Ben reflects, laying a foundation for growth that’s included 10 acquisitions in the last two years.

Ben’s tips:

1. Don’t just focus on keeping the balls in the air. Focus on which ball will drive the success of your business.
2. Stability is a seductive road, but staying the same inevitably means decline.

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Tim Alter | Cleveland, OH

CEO, Rudolph Libbe Inc.
 CE 3547 | Chair: Brad Roller
 Vistage member since 2008
Lifetime Achievement Award

“Planning and executing effective leadership transitions is one of the most important things you will ever do in your career,” Tim Alter shares. “Everyone in the company is counting on you to do what’s best for their future.”

With almost a half-century in the construction industry, and 38 years with RLI, Tim is retiring in December 2021 after a string of record-breaking years — with a strong succession plan in place. He will continue to serve the company as a board member and personal coach to key individuals after his retirement.

Tim’s shares an effective succession plan must be:

1. Future-facing
2. Organized and seamless
3. Transparent
4. Stakeholder-engaging
5. Aligned with company strategy and culture
6. Designed to support your successor

Bill Campbell | San Francisco, CA

President, Marbill Management Corp.
 CE 642 | Chair: Julie Reinganum
 Vistage member since 2009
Lifetime Achievement Award

“At the end of the day, it’s about people,” says Bill Campbell, a 13-year member who brings a lifetime of wisdom shared freely with those in need.

Reflecting on leaving a previous job he loved, to put family first, Bill explains, “The leadership climb for me was understanding my priorities. It wasn’t just simply success, success, success. ... I had to get a grasp of what’s significant.” He credits the most difficult times as those from which he’s learned the most.

Bill’s tips:

After setting vision, the CEO’s job is about people.

1. Leading is another word for building and motivating teams. If you’re not helping your team improve, you’re not doing it right.
2. Leadership is an art and every leader has their own way of doing it.
3. The most pivotal things are often pure chance.

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Jim Shaffer | Omaha, NE

Owner/CEO, Counterparts LLC
 Chairman/Co-Founder, 402 Arts Collective
 CE 3678 | Chair: Cathy Fitzhenry
 Vistage member since 2011
Lifetime Achievement Award

Whether a friendly hello or a deeply meaningful mentorship to a child, Jim Shaffer understands the transformational power of relationships.

Leaving a 25-year career in IT to pursue his current work in the hospitality and nonprofit spaces, Jim helps people find the greatness within — and he's great at it. Staying true to his vision through the era of social distancing, Jim has grown his nonprofit from 50 to 500 students, and his for-profit from a small concierge team to an association and property management company. His secret? Being and having mentors. As he says, "Who you hang with really has an impact on who you become."

Jim's other tips:

1. Leadership is not about doing the right things — it's about being the right person.
2. Invest in your wisdom.
3. Mistakes make great learning experiences.

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Todd Ford | Charlotte, NC

Owner & Founder, NoDa Brewing Company
 CE 4675 | Chair: Bob James
 Vistage member since 2019
Impact Award

As an airline pilot, Todd Ford felt he was too far from home, too often. In 2010, he took action, turning his home-brewing hobby into a career and carving a path forward through largely uncharted territory in North Carolina.

In 2020, Todd's industry faced a 22% decline, yet the NoDa Brewing Company increased sales by 6%, with a projected revenue increase of 35%-40% in 2021. Todd also successfully advocated for legislative change to benefit all microbreweries in his state, expanded his partnerships and invested in his team to ensure the next generation of leadership soars.

Todd's learnings:

1. Talk less, listen more.
2. It is not your job to have all the answers. Be open to feedback.
3. The best way to lead is to empower and educate your team.

Member reflection

"The leadership that most inspires my own is that of Patagonia as a company. They're intensely committed to the values and purpose of being environmentally conscious and a good corporate citizen."

Dylan Jeffress
 Impact Award, Berkeley, CA

"My father most inspires my leadership. ... He always took the time to learn about people as individuals."

Todd Lemke
 Leadership Award, Omaha, NE

5

Embrace diversity of thought

*“Changing your
perspective opens up all
kinds of possibilities you
didn’t imagine before.”*

– Brian Roy
Impact Award, St. Louis, MO



Dr. Janet Stout | Pittsburgh, PA

President & Director, Special Pathogens Laboratory
CE 4795 | Chair: Tricia Warrick
Vistage member since 2017
Leadership Award

A self-proclaimed “accidental entrepreneur,” Dr. Janet Stout is an infectious disease microbiologist recognized worldwide for 30+ years of pioneering research to eradicate Legionnaires’ disease.

After 23 years at the Pittsburgh VA, Janet found herself at a fork in the road in 2007 as her lab was shut down. She took hold of destiny and partnered with colleagues in the private sector, leveraging Vistage to achieve their new company’s vision. “Vistage has helped me and our company innovate and always be better,” she shares.

Janet’s tips:

1. Even though you may lose on occasion, don’t quit. Persevere.
2. You never get there by yourself. Accept help and help others.
3. Begin with the end in mind and stay focused on what makes you great!

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Matthew Mullin | Las Vegas, NV

Principal & Founder, The Mullin Group at Berkshire Hathaway HomeServices
CE 621 | Chair: Clyde Horner
Vistage member since 2013
Leadership Award

“I have a new level of confidence that if we can grow through this, we can grow through anything,” reflects Matt Mullin on his team’s climb through the COVID-19 pandemic. Matt found his love for serving the community through real estate, and in 2020 found an unprecedented growth experience.

“There was no playbook,” he recalls, losing 60% of his business in just seven days. “I’ve been selling real estate for over 17 years ... This was a perfect storm.”

Here are the lessons Matt learned on his path to recovery:

1. Surround yourself with the best people and ask for help.
2. You don’t need to know how it’s all going to play out. Move forward step by step.
3. Take care of your health. Exercise daily.
4. When you can’t build revenue, build relationships.

Todd Lemke | Omaha, NE

Owner/Publisher, Omaha Magazine
CE 4081 | Chair: Rick Faber
Vistage member since 2014
Leadership Award

Todd Lemke launched Omaha Magazine 38 years ago, pioneering online community sites that serve as a model for publications nationwide. When COVID hit and advertising dollars evaporated, Todd leaned on group decision-making to navigate uncharted territory. “As a leader, you have to be able to display and communicate hope,” he reflects.

Leveraging Vistage as his “MBA program,” Todd’s unflinching dedication kept his company strong, his team invested and his employees paid. In this difficult year, Omaha Magazine even brought home eight Great Plains Journalism Awards.

Todd’s learnings:

1. Adaptability means finding what is working.
2. Reflect on the inside what you want to reflect on the outside.
3. Sometimes need is the mother of adaptability and ideas.

[Watch video](#)



Steve Warfle | Rochester, NY

President & Co-Founder, InSite Software
 CE 4019 | Chair: Scott Gibbs
 Vistage member since 2016
Leadership Award

“I learned to ask for help. It was transformational,” reflects Steve Warfle. Co-founding InSite Software 32 years ago, tragedy almost forced Steve to close the doors in 2015. Instead, he found Vistage — and instilled core values that completely changed the game. “I admire leaders who bring their own passion, but also trust the experts,” he says.

Today, InSite Software is the industry leader in earthwork takeoff and GPS modeling tools. Steve is leading his team through current challenges into the future, developing a new best-in-class version of its software and introducing an auto-renewing subscription model in 2020.

Steve’s core values:

1. Passionate about helping others.
2. Promote a safe working environment.
3. Driven to improve.
4. Work together as a team.



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Tripp Davis | Philadelphia, PA

President & CEO, LD Davis Industries
 CE 341 | Chair: Carol Steinberg
 Vistage member since 1999
Leadership Award

“If you ask me, I’m the Chief Culture Officer,” says Tripp Davis. A Vistage member for 22 years, Tripp took over his third-generation family business at just 36 years of age. His commitment to culture has kept LD Davis No. 1 in its industry for decades.

“My dad had a robust management team and I was their mentee for eight years. One day — they became my subordinates. For those men to stay through my leadership, and five of six retire under my leadership. ... I’m very proud of that.”

Tripp’s culture-first tips:

1. Hire the best people you possibly can, even if it costs more.
2. Hire people smarter than you and don’t micromanage them.
3. Fire fast. Hire slow.
4. Invest in yourself, and invest in your people.
5. Embrace change.

Member reflection

“I find levity being with my wife ... we’ve been married 108 years (54 for her and 54 for me) and I find a great deal of strength just being with her.”

Wayne Tesch
 Lifetime Achievement Award,
 Orange County, CA

“I love to ride my bike. I often ride my bike to and from work. It takes me about an hour each way, but it is a great way to decompress.”

Scott Wendelburg
 Impact Award, Menomonee Falls, WI

Merrie Jo Pitera | Kansas City, MO

Sr. Director of Jury Consulting, Litigation Insights, IMS
 CE 3950 | Chair: Jeff Hutsell
 Vistage member since 2012
Lifetime Achievement Award

Before her record sale to a larger firm, Dr. Merrie Jo Pitera spent almost 30 years parlaying her psychology and communications background into litigation and trial consulting. She says her biggest challenge was learning to temper her “inner Jersey girl” when she became CEO at the start of the Great Recession, and on the heels of unexpected tragedy.

By developing her leadership skills and surrounding herself with smart, supportive people, she has overcome several challenges to help her company — and her clients — achieve success.

Merrie Jo’s learnings:

1. Being CEO does not mean you need to know all the answers.
2. Your fears and concerns aren’t weaknesses.
3. Share your knowledge to help others find a great path forward.

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**Scott Weaver** | Lebanon, PA

Visionary, APR Supply Co.
 CE 3362 | Chair: John Dame
 Vistage member since 2006
Lifetime Achievement Award

“I do three things in life. I grow a business, I create and help leadership, and I manage a culture,” says Scott Weaver, a visionary third-generation leader dedicated to providing groundbreaking solutions to customers while prioritizing company culture.

“In the first 10 years of leadership, I thought strategy was the bomb. We had a bunch of strategies that were very, very smart. As soon as we concentrated on culture first? We grew much faster.”

Scott recommends leaders heed these lessons:

1. The team can make better decisions than any one individual.
2. You’re not as good as you think you are. Keep changing, growing, learning.
3. Culture trumps strategy.
4. Remind yourself: It isn’t about me, at all.
5. Be a perpetual student.

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Rob Miller | Sheridan, WY

CEO, Frontier Asset Management
 CE 4885 | Chair: Rex Wiederspahn
 Vistage member since 2018
Impact Award

Based in Sheridan, Wyoming, Frontier Asset Management has nearly quadrupled assets in the last five years and more than doubled in staff. Assuming the role of CEO in 2015, Rob Miller unified a siloed executive team, and developed and instilled core company values while inspiring employees to reach their full potential.

“When I took over this position, the leadership team had five different opinions on where the company should go, what was making us successful. ... Everybody was on a different page,” he recalls.

Rob’s tips for persevering:

1. Never assume you’re done. Be open to new ideas and innovation.
2. We all have unique superpowers. If you assume everyone thinks like you, you will always be frustrated.
3. Leadership is a journey. Never stop learning and challenging yourself.

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Member reflection

“I always say, I don’t want to be the smartest person in the room.”

Erin Anderson
Impact Award, Boise, ID

“Even when things are bad, we can do better tomorrow.”

Brian Osborne
Lifetime Achievement Award,
St. Louis, MO

“If you wanted to be a good leader, would you be the leader you are right now, or would you want to follow the person you’re looking up to?”

Brad Avrit
Leadership Award, Los Angeles, CA



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Leon Sierra | Houston, TX

CEO & Founder, Mid-State Wine and Liquor SB 812 | Chair: Robin Stanaland
Vistage member since 2018
Impact Award

Leon Sierra ran his company for 20 years before finding Vistage. “I believe that’s when my journey to becoming a leader happened,” he shares. “I reached out for help, and I became vulnerable to allowing others to help me.”

Leon used the decreased productivity of 2020 as an opportunity to work on his business instead of just in it, adopting an open-growth mindset he’s instilled in his team. “My goal in leadership is to help others, but also to empower them, not enable them,” he says.

Leon’s tips:

1. Define your expectations and make sure everyone knows their part.
2. Write out your core values and share them with your team.
3. Let your guard down. Allow others to help you.
4. Ask questions. Don’t dictate how things should be done.

Brian Roy | St. Louis, MO

Executive Director, Variety the Children’s Charity of St. Louis
CE 4477 | Chair: Jonathan Jones
Vistage member since 2019
Impact Award

When COVID canceled fundraisers — threatening half of his annual budget — Brian Roy rose to the challenge. He quickly adapted the 90-year-old charity’s model and created new programs for children with disabilities and ensured uninterrupted access to critical services.

In the process, Brian established new partnerships, better positioned Variety, and compelled his community to rethink its social impact. “A radical change in perspective may hold the solution people are looking for,” he reflects.

Brian’s learnings:

1. Set audacious goals.
2. Step back from the operational mindset to think about strategy and vision.
3. Challenges can be the catalyst companies need to go from good to great.

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Mark Botos | Pittsburgh, PA

CEO, Aerotech Inc.
 CE 3780 | Chair: Charles Gounaris
 Vistage member since 2011
Lifetime Achievement Award

Over the last 10 years, Mark Botos and his team have led the global industry leader in precision motion control and automation from \$45M to \$115M+ in revenue, with multimillion-dollar growth ahead. The son of Aerotech's founder, he recently transitioned from day-to-day operations to overseeing the full family of Aerotech companies.

"Everybody has different strengths and methods to their madness," Mark shares of his leadership style. "Understanding who you are and surrounding yourself with people that are complementary — rather than carbon copies of you — is extremely valuable."

Mark's other tips:

1. Know your why.
2. Don't be afraid to change.
3. Hire people smarter than you, create an environment in which they can succeed, and then get out of their way.



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Holly Moore | Orange County, CA

Founding Attorney/CEO, Moore Family Law Group
 SB 2769 | Chair: John Morris
 Vistage member since 2019
Impact Award

"She challenges us all to be the best we can be," a Vistage peer shares of Holly Moore, a passionate family law attorney driven by values ingrained in her as a child. "It really dates back to my days on the playground," reflects Holly, a leader never afraid to stand up for what is right.

"The biggest thing I have learned is, there are so many people with amazing talent and gifts. And if you give them the space and the grace to rise up to whatever challenge you set before them ... you're going to be amazed with what people can do."

Holly's tips:

1. Let go to grow. Even if it terrifies you.
2. Leadership is not about "cracking the whip." It's about being in service to others.
3. There are people who can do things better than you. Let them.

Chris Shafer | Sacramento, CA

CEO, EKC Enterprises
 CE 4207 | Chair: Neil Paschall
 Vistage member since 2019
Impact Award

From his grandmother's garage, to 230 employees. 109% growth over the last three years. Six strategic acquisitions in the last two. And this only scratches the surface of Chris Shafer's achievements.

A business owner who realized he did not actually know how to be a CEO, Chris joined Vistage in 2019, eager to learn. "We can make up whatever title we want when we own the company," he reflects. "It doesn't mean we're doing that job successfully."

Some of Chris' top tips on his path to leadership:

1. Sometimes you have to say yes and then figure it out.
2. The right people in the right seats will power your growth. Implement EOS.
3. Don't allow success to make you complacent.
4. Good things happen (and top talent finds you) when you do things the right way.

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James Beckwith | Sacramento, CA

President & CEO, Five Star Bank
CE 3751 | Chair: Lonnie Martin
Vistage member since 2012
Leadership Award

When a colleague told James Beckwith he needed to “go to charm school,” he faced the criticism head on, with a 360 “business intervention” that opened his eyes to the importance of leading with empathy.

“I had no idea how I was perceived,” he shares. “I was the bull in the china shop. Effective, but with a lot of broken bones left behind.”

James focused on being a leader his team could trust — grounded in empathy, consistency and communication. The Sacramento Metro Chamber of Commerce named him “Businessman of the Year” in 2020.

James’ tips:

1. Listen more than you talk, and understand more than you react.
2. Be present 100% of the time. You have no idea what your frown can do to someone’s day.
3. If you’re not doing an anonymous, 360 review of yourself, you should.

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**Brian Rott** | San Diego, CA

CEO, Cart Mart Inc.
CE 3468 | Chair: Jim Heaton
Vistage member since 2008
Lifetime Achievement Award

Brian Rott began his career at the family business at 14 years of age — cleaning toilets. Now CEO, Brian has led Cart Mart to massive growth, expanding from one location to seven, on pace to grow 1,000%+ in the 14 years he’s been a member of Vistage.

“The biggest hurdle for me in embracing expansion was understanding how far I could push myself and my team,” he reflects. “Once I understood our true talents, it gave me the motivation to dig in, invest and start to grow.”

Brian’s tips:

1. Know when to step on the gas, and when to put on the brakes.
2. Trust in yourself, but learn to trust more in others.
3. Preserve your credibility by following “The Golden Rule.”
4. Hire on character, train for skill.
5. Stay true to your convictions.

Member reflection

“What one thing would you go back in time and tell yourself on your first day as a leader?”

Patrick Patterson
Impact Award, Pittsburgh, PA

“What are you building today, to make a brighter future for tomorrow?”

Holly Mazzocca
Impact Award, Cincinnati, OH

“Was it worth it? Did you enjoy it? Would you do it again? What would you do differently?”

Bill Campbell
Lifetime Achievement Award,
San Francisco, CA

6

Create and nurture resilience

“Never give up, plain and simple.”

– Kris Vockler
Leadership Award, Portland, OR



Mike Lee | Phoenix, AZ

President, Skyline Builders and Restoration Inc.
CE 159 | Chair: Karie Montague
Vistage member since 2009
Leadership Award

“Leadership is a test that happens every single day,” Mike Lee shares. “Just because you passed yesterday, doesn’t mean you’re going to pass today.” A proven leader who brought the dedication, authenticity and resiliency of a middle school teacher to the unexpected role of company president of his family business, Mike dove headfirst into his new role.

“It was a lot of just learning under fire,” Mike reflects, joining Vistage to translate his practical knowledge into C-level action.

Mike’s learnings:

1. Sometimes the greatest challenge yields the best education.
2. There is no one major milestone to being a leader. Every day counts.
3. You can’t fake authenticity.
4. The leadership climb is lifelong.

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Dan McKeown | Saint Paul, MN

President & CEO, The Specialty Mfg. Co.
CE 3402 | Chair: Allan Gorsett
Vistage member since 2007
Lifetime Achievement Award

“You’ve got to see the problems others can’t see,” reflects Dan McKeown. Visionary leader of a fourth-generation, privately held, family-owned business, Dan has led disruptive change through adversity, playing the long game while ensuring his mission and his people weren’t lost along the way.

“When you’ve been a leader for a long time, you have a gut view of what’s working, what’s not, and the need for change,” he shares. “If you give that up because it’s getting harder ... you’re not doing your job.”

Dan’s tips:

1. Understand what the existing process is, before you try to change it.
2. Sometimes you can be your own blind spot.
3. The journey is just as important as the destination.
4. Keep pushing yourself. It’s a mindset.

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Kris Vockler | Portland, OR

CEO & President, ICD High Performance Coatings
CE 4072 | Chair: Ron Merryman
Vistage member since 2016
Leadership Award

“Being CEO is forged in the experiences we go through,” says Kris Vockler. “It makes us who we are.”

Once unsure of her ability to assume control of her family business, seven years later Kris navigated 2020 with no loss in production days, improved profitability and significant growth forecast for 2021.

Asked how she gained the confidence to “become a CEO,” Kris credits Vistage and an innate tenacity. “Just go and forge it,” she shares. “Like a sword. You literally just bang metal all day, every day, until it forms. You can read a job description, but it’s not going to help you one bit.”

Kris’ tips for CEO mastery:

1. Never give up, plain and simple.
2. Hone in on the principles others have lain down before.
3. Let the experiences happen.

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Member reflection

“My first job was a paper route at about 11 years old. My leadership climb began in the Marine Corps, where I learned how to lead by example.”

Steve White
Impact Award, Buffalo, NY

“My first job was as a corn detasseler in Indiana, at age 12. My mother would drop me and my older sister off at the bus stop at four in the morning. ... I believe my parents thought it would build character. My leadership climb began when I was elected president of the student body in seventh grade.”

Tameryn Campbell
Leadership Award, Charlton, MA



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Dharshan Jayasinghe | Buffalo, NY

President & CEO, bizWin Strategies and Triad Healthcare Recruiting
CE 4827 | Chair: MJ Caliendo
Vistage member since 2014
Leadership Award

Dharshan Jayasinghe has a personal goal of challenging the status quo to achieve extraordinary results for his clients — ensuring they achieve their own goals 89% faster. “We just don’t quit. There’s no quit on us,” he shares.

Seven years ago, he launched his executive recruitment firm using unique technology and a deep understanding of the psychological and human aspects of high-level executive matchmaking.

Dharshan’s entrepreneurship tips:

1. To successfully launch a new company, product or service offering, be sure to invest enough time, money and effort into acquiring accurate and relevant business intelligence.
2. Leverage your Vistage Chair and group to reflect on everything you know, and embrace their challenging questions as integral to your path to success.

Tressa McLaughlin | Boise, ID

President & CEO, SOLV
CE 4097 | Chair: Ron Gambassi
Vistage member since 2014
Leadership Award

“You have to know yourself well enough to know if you have the grit and determination to go the extra mile,” reflects Tressa McLaughlin on her leadership climb. In her sixth year of co-ownership of SOLV, Tressa’s leadership drove the business to adapt, sustain and grow through the COVID-19 pandemic.

Looking back on the decision to purchase SOLV after decades as an employee, Tressa remembers it as an enormous challenge and — in true character — also calls it “one of the best decisions of my life.”

Tressa’s tips for facing a mountain:

1. Be honest with yourself, and honest about what you don’t know.
2. Do your homework.
3. Be confident and comfortable in asking great questions.
4. Be open to hearing the good, the bad and the ugly.

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Donald Weaver | Austin, TX

President, Weaver Technologies
CE 5650 | Chair: Randy Targhetta
Vistage member since 2019
Impact Award

"There may be many doors that will be closed, but that doesn't mean stop. Keep knocking, keep asking, keep talking and most of all keep going," reflects Donald Weaver. Overcoming challenges of unmanaged topline growth in 2019, in 2020 Donald's company grew 25% and GP went from 29% to 33%.

A U.S. Army veteran, Donald credits his military background for his drive to persevere, as well as the huge responsibility he feels to serve his employees and customers. "I couldn't fail," he recalls. "I had to make this work."

Donald's tips for continued resolve:

1. Never quit. You can always go further than you think.
2. Ask for help every day.
3. Don't try to go it alone. Seek counsel of peers.
4. Don't fear self-reflection. It can be what pushes you forward.

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Paul DiCosmo | Mesa, AZ

CEO, The StateServ Companies
CE 159 | Chair: Karie Montague
Vistage member since 2012
Lifetime Achievement Award

Paul DiCosmo has grown StateServ from start-up to the largest DME benefit management provider in the U.S., with a team of 670+ and revenues exceeding \$700M.

Co-founding his company at just 25 years old, Paul shares, "The most important thing I've learned is, never give up. Because when you embark on an entrepreneurial journey, you are absolutely going to feel like you've failed many, many, many times."

A pivotal achievement in his leadership climb was StateServ's first private equity transaction in 2017. Paul's lessons learned:

1. Choose your investment banker wisely.
2. Go with your gut.
3. Don't compromise your values for the highest bidder.
4. Be open to change.
5. Be committed to the longevity of the company, not yourself.

Steve Hammock | San Diego, CA

President, Watkins Wellness Corporation
CE 3880 | Chair: Dale Robinette
Vistage member since 2012
Leadership Award

When Steve Hammock began his career with Watkins Wellness Corp. in 1982, it was a small hot tub manufacturer. Today, Steve leads the \$500M+ company of 3,000 employees worldwide, serving customers in 1,000+ retail locations in 50 states and 70+ countries.

Steve credits his leadership experience gained through the Great Recession in helping him successfully navigate the pandemic. His top lessons:

1. The world has a way of not ending.
2. If you take care of your people when times are good, they're going to take care of you in your hour of need. Build up a reservoir of trust with employees AND customers.
3. We all have the capacity to think our way to higher ground. The adage "Necessity is the mother of invention" is true.
4. Live in the present.

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Vassar Byrd | Portland, OR

CEO, Rose Villa Senior Living
CE 3672 | Chair: Jim Plymale
Vistage member since 2010
Lifetime Achievement Award

“Never let a crisis go to waste,” Vassar Byrd says, reflecting on what she found upon assuming leadership of Rose Villa Senior Living.

From architecture stuck in 1965 to a disengaged staff, Vassar seized the disarray as an opportunity to pursue what was possible. Her dedication drove Rose Villa to emerge as the new industry standard.

Vassar’s tips for tackling the seemingly insurmountable:

1. Don’t look at the limits. Look at the possibility and then work backward.
2. Once you’ve got your idea, put it down on paper.
3. Start talking about it. The more you put it out there, the more it comes back to you.
4. Find allies who have done it before, and partners to help in crucial moments.
5. Go big or go home.

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Brian Osborne | St. Louis, MO

CEO, Christy Industrial Holdings
CE 175 | Chair: Allen Hauge
Vistage member since 2004
Lifetime Achievement Award

Brian Osborne began his career as an introverted engineer, buried in minutiae. Today, he is a servant leader focused on the big picture. “You can’t ever believe you are finished growing,” he shares.

Embracing his leadership climb, Brian had already held several positions at Christy Industrial Holdings when the owner offered him the opportunity to lead a new business in 2004. His appetite for challenge helped him succeed and continues to inform his personal and professional evolution. “Reward only comes to those who take risks,” he says.

Brian’s leadership learnings:

1. Do your research.
2. Choose mentors selectively.
3. The death of success is thinking you’ve achieved success.
4. No matter how bad things are, we can be better tomorrow.

Member reflection

“A learning experience that changed my life was in college when I went in to get a loan ... and they told me I didn’t qualify. I was really mad at the loan officer, and he told me, ‘Well, the world doesn’t owe you a living.’ I realized he was right, and I never thought of myself as a victim again.”

Mike Rydin
Lifetime Achievement Award,
Houston, TX

“One of the greatest learning experiences of my life is understanding the power of an idea.”

Alex Kirkwood,
Impact Award, Los Angeles, CA

Nick Crosby | Kansas City, MO

Owner and CEO, iResQ
CE 3895 | Chair: Jeff Hutsell
Vistage member since 2020
Impact Award

A high-ranking Army veteran, Nick Crosby brings his battle-tested leadership skills to work every day, with a vision that includes more than company growth. Drawing from his leadership training in the military, Nick is dedicated to building his young management team into future leaders.

Nick and his wife purchased the business in January 2020 and through tenacity, planning and problem-solving have doubled its size during the pandemic. In those early, uncertain days, Nick told his team, "We're going to grow, and we will be better in the long run." They have, and they are.

Nick's learnings:

1. Good management skills don't equal good leadership skills.
2. Train your team.
3. Use difficult hypotheticals in your interview process to identify good leaders.



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Watch video

Daniel Kuchlik | Plainview, NY

Owner & CEO, American Dry Cleaners and American Restoration Solutions
CE 5823 | Chair: Andy Arluck
Vistage member since 2019
Impact Award

Daniel Kuchlik saw revenues down 80% in March of 2020, losing his father and business partner the following month. With laser-focused vision for the future, Danny persevered to increase volume and profitability by 3x. Reflecting on his success, he is quick to recognize the importance of believing in his team. "I'm super grateful for them believing in me too," he shares.

On a solid growth trajectory amid an industry in decline, Danny has evolved to be a one-stop shop and advocate for clients. "Business is about adapting ... always looking to have a leg up, ready to try out something new," he says.

Danny's tips:

1. Stick to your vision.
2. Surround yourself with like-minded people.
3. Trust your people and put them in a position to succeed.

Duane Donner | Birmingham, AL

Founder and CEO, Founders Advisors
CE 4006 | Chair: Frank Day
Vistage member since 2014
Leadership Award

"It's not how tough you are. It's how long you're tough," says Duane Donner, with wisdom gleaned in the Great Recession that informed the way he approached the pandemic. Through strong communication and clarity of vision, he helped his company adopt an "in it together" attitude that kept the business running smoothly and efficiently.

Duane's leadership climb began in the U.S. Army, where he learned early on to keep poise to rally the troops — a lesson that proved valuable in 2020. "You've got to get to a place where you have confidence you can impart to your team," he shares.

Duane's tips:

1. Value your team. It is your biggest asset.
2. Look at challenges as an adventure, not a horror movie.
3. Opportunity is just on the other side.

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7

Stay committed, transparent and flexible

“No matter how hard it gets, don’t give up. Make a decision, commit to it, be accountable to the results, stay on track.”

– Ality Richardson
Impact Award, San Diego, CA



Michael Jacoby | Bethesda, MD

CEO and Chairman of the Board, Broad Street Realty, Inc.

CE 3696 | Chair: Brian Roberts

Vistage member since 2010

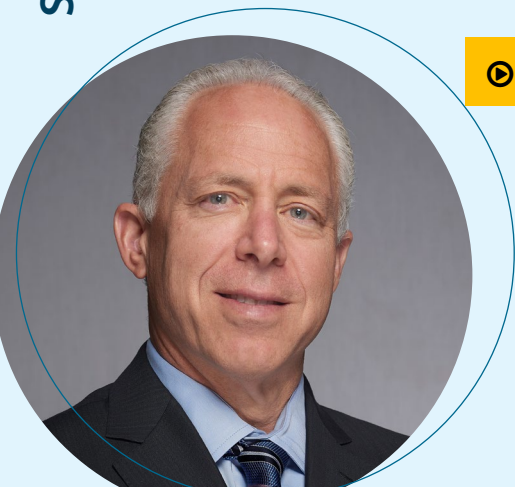
Lifetime Achievement Award

In a pivotal turn of events, Michael Jacoby took his company public in January 2020. One year later, 308 of his 309 tenants were open for business, more than 70,000 sq. ft. of existing tenants renewed, and not a single Broad Street employee was let go.

“A silver lining of COVID was that by being home, and not able to really be proactive on the business, we were able to be proactive on establishing policies, procedures, key performance metrics — things that will allow us to be more efficient in the future,” he reflects.

Mike’s top two tips for sustaining culture:

1. Have a core set of values you can lean on, like teamwork, respect, integrity, balance, accountability and leadership.
2. Alleviate stress by letting your people know they are No. 1 in your mind.



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Jake Crocker | Cleveland, OH

Managing Partner, Cara Zale

CE 3547 | Chair: Brad Roller

Vistage member since 2014

Leadership Award

With 40+ Raising Cane’s Ohio (RCO) locations and 3,000+ employees, Jake Crocker faced the COVID-19 pandemic with the mindset, while no one has been through this before, failure isn’t an option.

He reflects, “The priority was ensuring our people were always safe. That they knew we worried about them, their families, and each other. We knew if we got those three things right, we’d probably be okay. And then we started looking outward.”

Under Jake’s leadership, RCO had zero layoffs during COVID, grew sales by 30%, and delivered free meals to first responders.

His tips:

1. Make sure you have a really strong balance sheet and incredibly good people.
2. Do the “Debbie Downer” exercises so you’re ready for the unthinkable.
3. Keep it real with your team.

Member reflection

“Howard Schultz has inspired my leadership style. What I take from him is his ability to balance the objectives of Starbucks with the growth of his employees to be more than just team members.”

Michele Lex
Leadership Award, Napa, CA

“The leaders I find most inspiring are those with the smallest egos, those that look at their position as one to serve others and serve their organization.”

Mark Tipton
Leadership Award, St. Louis, MO

John Marten | Cincinnati, OH

President, The Shepherd Color Company
 CE 470 | Chair: Carolyn Washburn
 Vistage member since 2008
Lifetime Achievement Award

“Our competition is no longer in Ohio. It’s no longer in the U.S. Our competition is the rest of the world,” John Marten says of The Shepherd Color Company. Over the last 10 years, John has worked with his management team to ensure the fourth-generation family-owned business remains the global leader in complex inorganic color pigments by leading the cultural and structural changes imperative to success.

“The best thing is to tell people what the reality is, and what you’re going to do about it,” he reflects. “What energizes me is seeing people succeed.”

John’s tips:

1. Have a strong leadership team that can challenge your thinking.
2. Over-communicate, and be transparent.
3. Don’t wait for a challenge to pass. Face it head-on.
4. Stick to your core values.

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Alex Kirkwood | Los Angeles, CA

Founder & CEO, Kirkwood Collection
 CE 5880 | Chair: Michal Clements
 Vistage member since 2019
Impact Award

“If everyone’s going right, turn left,” says Alex Kirkwood, reflecting on driving success through COVID. Kirkwood avoided layoffs and achieved 93% of target revenues in 2020, expanding to six properties in 2021.

When competitors were taking a defensive posture at the pandemic’s onset, Alex did the opposite. “Instead of shuttering hotels and furloughing people,” he shares, “we asked staff if they’d be willing to jump in on a mini renovation.”

The strategy kept Alex’s team intact, and allowed the company to emerge an even stronger competitor.

Alex’s tips for leading boldly:

1. Understand the power of an idea.
2. Know the edge of your competency.
3. Embrace different approaches to problem-solving.
4. The counterintuitive decision is often the strongest.

Michael Showalter |

Minnetonka, MN
 CEO, Health e(fx)
 CE 5706 | Chair: Dean Sanberg
 Vistage member since 2020
Impact Award

“My advice to a leader: Know who you serve and put your whole heart into serving them,” says Michael Showalter. “It will be very tough at times ... but persevere. Acting even when you’re scared is incredibly empowering and gives you the strength to serve others.”

With his human-centric, selfless approach to leadership, Health e(fx) has become one of the leading Affordable Care Act (ACA) technology solutions. Showalter led a team and expanded the business during a period of uncertainty and changing regulations, growing revenue by nearly 45% percent and EBITDA by 95% over four years

Michael’s tips:

1. Have a strong purpose.
2. The business is not the end, it’s the means to making a difference.
3. Be a steward of opportunity for others.

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Member reflection

“I find levity in traveling the world and going to new places.”

Cody Hewitt
Impact Award, Rochester, NY

“Where I find levity, much to the chagrin of my family and team, is in really bad dad jokes.”

Devlin Liles
Leadership Award, Houston, TX

“I find levity when I cook for my friends, sharing great wine and conversations.”

Dharshan Jayasinghe
Leadership Award, Buffalo, NY



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Chase McNulty | Kansas City, MO

Founder and CEO, Charlie Hustle
CE 3895 | Chair: Jeff Hutsell
Vistage member since 2017
Leadership Award

A lifelong vintage T-shirt collector, Chase McNulty channeled his passion into a thriving brand. Though at first he was unsure about making the leap from trained designer to CEO, as the company has grown, Chase has grown with it.

In 2021, Chase earned the Kansas City Chamber of Commerce’s prestigious Mr. K award and drove his company’s most profitable year, all while sponsoring local charities and serving as a mentor to others. Though he once “didn’t fully understand what it meant to be a CEO,” in the past nine years, Chase has proven leadership fits him to a T.

Chase’s tips:

1. Creativity comes in structure, not chaos.
2. Bring in people who complement your strengths.
3. Have the humility to know you don’t have all the answers or skills to run the company.

Wayne Tesch | Orange County, CA

Co-Founder, For The Children
CE 440 | Chair: Beth Adkisson
Vistage member since 2005
Lifetime Achievement Award

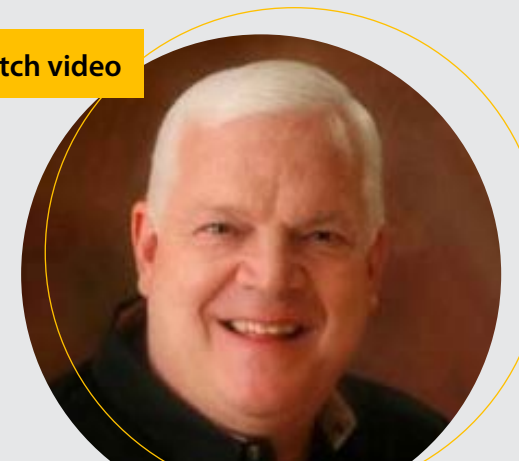
In 1985, Wayne Tesch had a vision of providing hope to foster kids in Costa Mesa, CA. Today, with the support of 20,000 volunteers, his nonprofit has helped more than 136,320 children in 43 states and eight countries.

Previously Royal Family Kids, For the Children is now the U.S.’ leading network of camps and mentor clubs for children of abuse, abandonment and neglect, expanding in 2020 into advocacy and more.

Wayne’s tips for bringing a vision into reality:

1. Make sure you can put it down on paper.
2. You can’t do it alone.
3. Make sure your personal and professional value statements align.
4. Create a language to communicate vision and values, and put systems in place to uphold them.
5. View fundraising as a means of bringing out the best in others — their compassion.

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Robert Hurlbut | Rochester, NY

President & CEO, Hurlbut Care Communities
 CE 48 | Chair: Tom Merkel
 Vistage member since 2009
Lifetime Achievement Award

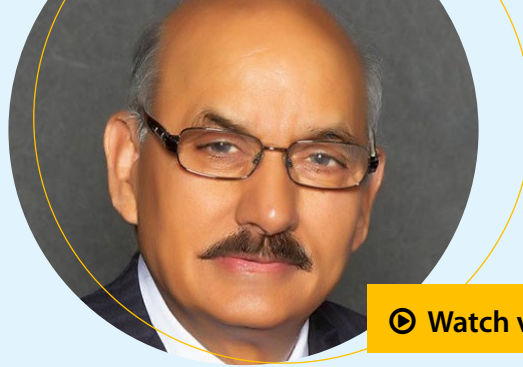
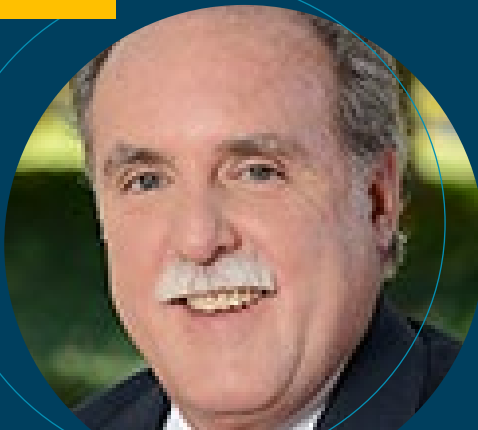
For 50+ years, the Hurlbut family has been caring for seniors in the Rochester area. In 2020, third-generation president and CEO Bob Hurlbut faced an unprecedented challenge. "There were no instructions," Bob recalls of the onset of the COVID-19 pandemic.

Bob not only keeps up with constantly shifting regulations as he leads a team of 2,000 in caring for 1,000 residents per day, he obtained special waivers to accept COVID-positive residents direct from hospitals to free up beds for critical patients.

Bob's lessons learned from 30+ years as CEO:

1. Keep calm.
2. There's a solution to every problem.
3. Always have people around you that know what they're doing.
4. No idea is stupid.
5. If you've made a decision, stick to it.

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Nathu Dandora | Philadelphia, PA

President & CEO, Computer Components Corp., CustomChill and Ray Machine
 CE 341 | Chair: Carol Steinberg
 Vistage member since 1991
Lifetime Achievement Award

Nathu Dandora arrived in the U.S. in 1972 with just a few dollars in his pocket. Today, the 30-year Vistage member is the epitome of the American Dream, a pillar of leadership deeply revered by peers.

"The key is not only to have the dream, but to start believing you've already achieved it," he reflects. An entrepreneur with six businesses under his belt, Nathu is regarded as the spiritual center of his group, a servant leader who has put his people first at every turn.

Nathu's lessons:

1. Do your best irrespective of what you get in return.
2. You can succeed only if you take care of your people.
3. Be sincere — customers will see it.
4. Happiness and peace of mind are within your control.
5. You cannot think clearly when angry.
6. There's a tremendous power within each of us.

Ality Richardson | San Diego, CA

CEO, i3POS – West Coast Division,
 i3 Verticals, Inc.
 CE 09 | Chair: Mike Malone
 Vistage member since 2018
Impact Award

Following the sale of her third-generation family business, Ality Richardson reassumed leadership to bring i3POS back on track amid the pandemic. "We're making history right now," she says. "I came back because I wanted to make sure the company was in a good spot, and make sure the people were taken care of. The people are everything."

Described by Vistage members as a "force of nature," she is also co-founder of Sober Life Recovery Solutions.

Ality's top seven leadership tips:

1. No matter how hard it gets, don't give up.
2. Make a decision, commit to it, be accountable, stay on track.
3. Pursue progress, not perfection.
4. Take a deep breath, take a step back, center yourself.
5. Keep your sense of humor.
6. Allow people to make mistakes.
7. Have faith.

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David Petersen | Chicago, IL

CEO, NAI Hiffman and Hiffman National Commercial Real Estate
CE 3507 | Chair: Dick Smith
Vistage member since 2015
Leadership Award

David Petersen has led NAI Hiffman/Hiffman National for 14+ years, growing it from 30 to 270+ employees with offices in 22 states. Under his leadership, the company has been repeatedly recognized as a top place to work by The Chicago Tribune, Crain's and Daily Herald.

During the pandemic, while most commercial and industrial real estate firms are losing tenants and management clients, David's focus on doing what's best for clients and employees alike has generated record revenue and profits.

A "self-appointed Chief Culture Executive" David sets two "mission critical" standards for his company:

1. Find, hire and develop the very best talent.
2. Get the culture right by building a work environment where everyone succeeds.

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Brian Wainwright | Manahawkin, NJ

President & CEO, The Wireless Experience
CE 4112 | Chair: Ken Mandelbaum
Vistage member since 2014
Leadership Award

Celebrating 25 years of business in 2022, Brian Wainwright has led TWE from mom-and-pop to top-rated East Coast AT&T retailer, expanding to 85 locations across five states in 2021, with further growth projected in 2022.

"You need to have the business ready to weather the storm," Brian says, reflecting on leading through the Great Recession, and how it prepared him to lead through the pandemic. When Brian shifted focus from revenue and profits to his people, it inspired a "reciprocal commitment" that saw his business turn a profit for the first time.

Brian's tips:

1. Surround yourself with people you can count on.
2. Remember where you've come from.
3. Make decisions based on what is right for your organization AND its people in the long term.

Member reflection

"My first job was at The Prudential. I had to arrive at work at 6 a.m., where giant pallets of paper came out of the computer data processing center. I put on these little rubber gloves and I had to sort them into hundreds of metal bands every morning. My leadership journey began right then and there when I realized leaders don't have to do this."

Michael Showalter
Impact Award, Minnetonka, MN

Constantino Lannes | Stanley, NC

President & CEO, Sennebogen, LLC
 CE 3797 | Chair: David Zerfoss
 Vistage member since 2014
Leadership Award

When Constantino Lannes took over in 2003, Sennebogen was a \$2M company with four employees. It will close this year at \$290M and 84 employees, a multinational powerhouse that stayed open through the pandemic to support essential businesses and the thousands they employ.

“We were not greedy and wanting to keep the business open for a larger profit,” he reflects. “Today, everybody, internally and externally, recognizes what we did. They value our decision to keep business moving forward.” Looking ahead, Constantino remains deeply committed to the training and development of his team.

Constantino’s tips:

1. Learn the language and culture of your customers.
2. Walk in your customer’s shoes before you say anything.
3. Process information quickly, make a decision and move on.

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Raymond Holcombe |

Birmingham, AL

Owner and President, HGH Hardware Supply and Sherwood Industries
 CE 563 | Chair: Kevin O’Neill
 Vistage member since 1997
Lifetime Achievement Award

When Raymond Holcombe’s father fell ill, the then 28-year-old was “thrown into the frying pan,” taking over the family business and learning to become a leader virtually overnight. More than 38 years later, Raymond has expanded his family business to include a second industry, weathered a recession that destroyed competitors, and reinvented his company in the face of COVID.

Throughout, Raymond has served as a dedicated, involved and intellectually curious member of the Vistage group he helped form. “He is a shining tribute to the true value and purpose of Vistage,” his Chair shares.

Raymond’s learnings:

1. No business is truly recession-proof.
2. Leaders must be decisive and act quickly in crisis.
3. Peers are invaluable in times of trouble.

John Christian Williams |

New Orleans, LA

Founder and CEO, JCW Creative
 SB 2541 | Chair: Meredith Eicher
 Vistage member since 2018
Leadership Award

John Christian Williams founded JCW Creative at just 19 years of age, from his college dorm room. When he was 23, it was on the verge of bankruptcy. In the 3.5 years that followed, John has turned JCW around, hitting \$3M in revenue and building a 27-person team.

Reflecting on his leadership climb, he shares, “There have been ups. There have been downs. But it is a journey. ... And if you’re looking for a finish line, you’re not going to get there. The joy, the fulfillment is in the every single day and in the working toward something bigger, always.”

John’s tips:

1. There is a difference between owning a business, running a business and BEING the business.
2. Take a step back and ask, “How can I do this right?”
3. Leadership means continuously learning.

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The leadership climb is ...



Call for 2022 Member Excellence Awards nominations

Day after day, year after year.

Vistage members rise to the challenge of leading with integrity. Vistage members climb with purpose — an inspiration to their teams, families, communities and the world.

This e-book is dedicated to the award-winners within who so graciously shared a window into their leadership journeys. We hope you continue to find value in exploring their learnings, and wish you strength and courage as you continue your own leadership climb.

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Submit your nominations now

“We all have problems and adversities in running businesses, but you have to be the solution-finder as the CEO. And sometimes, you have to dig really, really deep to find the solution, but it’s there. And you can’t give up.”

– Jennie Campbell
Lifetime Achievement Award, New Orleans, LA

