

THE
**LEADERSHIP
CHALLENGE**[®]
A Wiley Brand

FORUM 2017

SAN DIEGO, CALIFORNIA · JUNE 15-16



**CELEBRATING AND STRENGTHENING
THE FIVE PRACTICES OF EXEMPLARY LEADERSHIP[®]**



FORUM 2017



Welcome to The Leadership Challenge Forum 2017! We're delighted to have you join us in San Diego for the opportunity to connect with like-minded leadership development professionals, learn from experts in a variety of sessions, and go deep with The Leadership Challenge over the course of the next two days. As we sat down to plan this 10th annual gathering, we were hard at work on the sixth edition of the book that started it all, *The Leadership Challenge*. Coupled together, these milestones made it a natural choice to focus on Celebrating and Strengthening The Five Practices of Exemplary Leadership[®]. To do so, we invited ten Certified Masters of The Leadership Challenge to chair session tracks dedicated to each of The Five Practices. Thank you Mason Chock, Dan Schwab, Renee Harness, Kelly Ann McKnight, Steve Coats, Valarie Willis, Jody Rogers, Steve Skarke, Stephen Hoel, and Amy Savage! We're also excited to host Garry Ridge of WD-40 Company who will share his ethos of *It's All About the People*. So settle in and let's begin our Forum 2017 journey.

Love 'em and Lead 'em,

Jim Kouzes and Barry Posner

Registration and Information Desk

The Pre-conference and Forum registration and information desk location will change day-to-day. See schedule and location below.

Tuesday, June 13th

7:00–9:00am, California Foyer

Wednesday June 14th

7:00–8:00am, California Foyer

11:00am–12:00pm, California Foyer

4:00–7:00pm, California Foyer

Thursday, June 15th

7:00am–4:30pm, California Foyer

Friday, June 16th

7:30am–3:45pm, California Foyer

Meals

Your conference registration includes breakfast and lunch both days, and admission to the Networking Cocktail Reception featuring light appetizers. Breakfast will be served in the Plaza Foyer 7:30-8:30am on Thursday and 8:00-9:00am on Friday. Lunch will be served 12:15-1:30pm on Thursday and 11:45 – 1:00pm Friday in the California Ballroom. The Networking Cocktail Reception on Thursday evening will take place from 5:30-7:00pm on the Garden Terrace.

Bookstore

The Forum bookstore will be open 7:30-4:30pm on Thursday and 8:00-3:30 pm on Friday, except during general and breakout sessions. It is located in the Santa Fe Foyer.

Resource Hub

Looking for more information on our new updates and initiatives, including LPI 360+ and The Leadership Challenge Learning Hub? Please stop by and visit with our Platform Specialist Joshua Carter. He will be available to help answer your questions, as well as performing short demos and tutorials on topics including: LPI 360 & 360+ Administration, How To Upload Observers In Bulk, and How To Generate Reports. Both Josh and a CrossKnowledge colleague will be available to show a preliminary version of our digital Learning Hub currently in development. The Resource Hub will be located in the Santa Fe Foyer adjacent to the bookstore.

Book Signings

All attendees receive an autographed copy of *The Leadership Challenge 6e* by Jim Kouzes and Barry Posner. Jim and Barry will be available for personalizing books and autographing further purchased copies following their Thursday morning keynote, 10:15-10:45am in California Foyer.

Presentations

Select presentation materials will be available at www.leadershipchallengeforum.com approximately two weeks post-Forum. Links to select photos and video shot at the Forum will be delivered via email in month following the event.

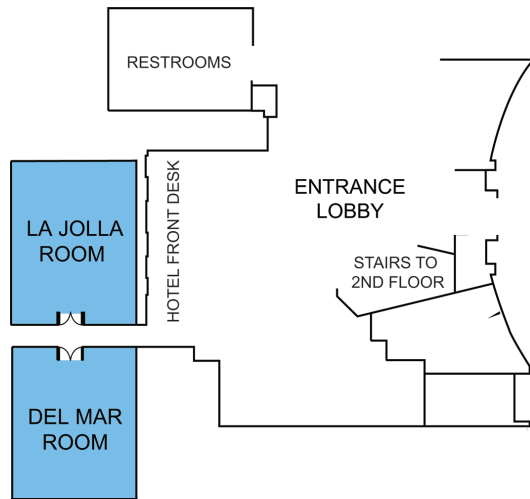
The Leadership Challenge Forum on Social Media



The Leadership Challenge Forum 2017 is on social media and we want to hear from you! Tell us how you celebrate The Five Practices of Exemplary Leadership® by sharing a post on Facebook, Twitter, or Instagram using **#TLCForum17**.

Hotel Map

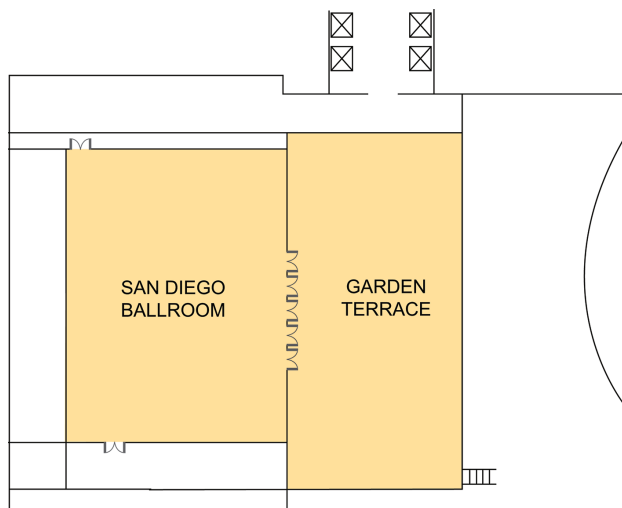
LEVEL ONE



LEVEL TWO



LEVEL FOUR



The Leadership Challenge Forum Team



William Hull
Director



Marisa Kelley
Brand Manager



Mandy Johnson
Global Sales Coordinator



Rebecca Middleton
Sales Coordinator



Kelsey Anderson
Events Manager



7:00–7:30

SIERRA

Activity

Yoga for Leaders

7:30–8:30

PLAZA ROOM

Continental Breakfast

8:30–10:15

CALIFORNIA BALLROOM

General Session—Celebrating & Strengthening the Five Practices of Exemplary Leadership

10:15–10:45

CALIFORNIA FOYER

Break with Author Book Signing

10:45–12:15

Model the Way Sessions

KNOWLEDGE & SKILLS SESSION

PLAZA

Good to Great: Moving the Needle through Leadership Development

ERIN DESTEFANIS & ASHLEY KUBACK

CASE STUDY SESSIONS

LA JOLLA

Future Growth and Sustainability: The Five Practices of Exemplary Leadership in Action

TEO JIN LEE

SANTA FE

Organizational Cultural Transformation Using TLC—A case study

SHRIDHAR SAMPATH

ACTIVITY SESSIONS

SIERRA

Using Well-known Definitions to Trigger Deep Explorations into What We Value

DEANA RAFFO

DEL MAR

Leadership in Polarized, Provocative, Precarious Times: A dialogue...

SHARON LANDES

12:15–1:30

CALIFORNIA BALLROOM

Lunch**1:30–2:45****Inspire a Shared Vision Sessions****KNOWLEDGE & SKILLS SESSION**

DEL MAR

You Have My Attention but Where Are We Going?
Vision as a Springboard to Greatness!**GREG ALLEN & RON SIERS****ACTIVITY SESSIONS**

SIERRA

Appeal to Others: Using Relationships & Systems
to Inspire a Shared Vision**KELLY ANN MCKNIGHT
& DEBBIE NICOL****CASE STUDY SESSIONS**

PLAZA

Creating a Signature Story to Inspire a Shared Vision:
Using Powerful Stories in Facilitation**VAUNDEE ARNOLD
& RENEE HARNESS**

LA JOLLA

The Leadership Challenge® and the
Advanced National Training Program**MARY BEIRIGER &
DANIEL YOSCA**

SANTA FE

Secrets of Delivering TLC in Multi-Cultural Organization

CONNIE STEPHENS**2:45–3:00**

CALIFORNIA FOYER

Break**3:00–4:15****Challenge the Process Sessions****KNOWLEDGE & SKILLS SESSIONS**

DEL MAR

Virtual Facilitation

BETH HIGH

SIERRA

CRA—An Innovative Thinking Tool that Revamps your Business

TERENCE YEUNG**CASE STUDY SESSIONS**

SANTA FE

Challenging the Process—Different Cultures, Powerful Results

GRAHAM MOORE

LA JOLLA

Challenging the Process:
Preparing Leaders for a Digital Transformation**AMANDA AGHDAMI**

PLAZA

Getting Even Better Outcomes by Challenging
How You Design & Deliver TLC**KRISTA SKIDMORE****5:30–7:00**

GARDEN TERRACE

Networking Cocktail Reception

7:30–8:00

SIERRA

Activity

Yoga for Leaders

8:00–9:00

PLAZA

Continental Breakfast

9:00–10:15

CALIFORNIA BALLROOM

Keynote

It's All about the People

GARRY RIDGE

10:15–10:30

CALIFORNIA FOYER

Break

10:30–11:45

Enable Others to Act Sessions

KNOWLEDGE & SKILLS SESSIONS

DEL MAR

Taking Care of the Leader

ROBERT LUCANIA

LA JOLLA

Identifying and Addressing Conflict: Reflections on enabling others to create change through collaboration

KAREN HAROLD & MAURICE EL AMRANI

CASE STUDY SESSIONS

PLAZA

Growing Servant Leaders in the Aging Services Industry: A Powerful Partnership Shows How It's Done

BILL MUGAVIN & EMILIE PERKINS

SANTA FE

Growing Leaders Using Internal Coaches—A Case Study from First Command Financial Services

KAREN ATWELL

EXPERIENTIAL ACTIVITY SESSION

SIERRA

Using the FLOW to Engage Your Workforce

CARMELA CRAWFORD & RICHARD PELAY

11:45–1:00

CALIFORNIA BALLROOM

Lunch



**1:00–2:15****Encourage the Heart Sessions****KNOWLEDGE & SKILLS SESSION**

DEL MAR

What about Love? Reinvigorating the 7 Essentials of Encourage the Heart to Engage Higher Performance

MILTON ALMEIDA & SHERYL HANSEN

CASE STUDY SESSIONS

PLAZA

Recognizing the Unsung Heroes: A Case Study from Kentucky School Districts

RHONDA CALDWELL & TOM PEARCE

SANTA FE

With the Wave of the Wand—How The Leadership Challenge Positively Impacted Team Member Satisfaction at Universal Orlando

KIRSTEN ABBOTT-WEST

ACTIVITY SESSIONS

SIERRA

Nuggets and Pearls: A Ring of Engagement Using the Power of Affirmation

ALAN LYME

2:15–2:30

CALIFORNIA FOYER

Break**2:30–3:45**

CALIFORNIA BALLROOM

Closing Session

Bringing it All Together

7:00–7:30

SIERRA

Activity

Yoga for Leaders

7:30–8:30

PLAZA ROOM

Continental Breakfast

8:30–10:15

CALIFORNIA BALLROOM

General Session

Celebrating & Strengthening the Five Practices of Exemplary Leadership

PRESENTED BY JIM KOUZES & BARRY POSNER



All organizations and products have an origin story. We have ours. Thirty-four years ago, Jim Kouzes and Barry Posner invented a process called Your Personal-Best Leadership Experience, and four years later, after reviewing hundreds of stories, interviewing scores of leaders, discovering a common set of practices, assessing thousands of individuals, and testing the model in workshops and seminars, they published the first edition of *The Leadership Challenge*. In that book, Jim and Barry described The Five Practices of Exemplary Leadership®, and that model has stood the test of time and remains as relevant today as it did thirty years ago. The Leadership Challenge Forum 2017 celebrates the vitality of The Five Practices and offers you the opportunity to strengthen your knowledge and skills in coaching and facilitating The Leadership Challenge® experiences. This year's Forum simulates the design of The Leadership Challenge® Workshop, and just as every TLCW begins with an Orienteering session, the 2017 Forum opens with a process designed to help you navigate through the two-day program. You'll hear a brief history of The Leadership Challenge, find out what's new in the sixth edition, explore some of the newest evidence on how exemplary leadership improves Positive Workplace Attitudes, get acquainted with the Forum program, and have an opportunity to set some learning goals for the two days. In addition, you'll connect with some other accomplished professionals traveling with you on this journey to making extraordinary things happen in Organizations.

Jim Kouzes is Dean's Executive Fellow of Leadership, Leavey School of Business at Santa Clara University.

Barry Posner is Accolti Professor of Leadership and former Dean (1997-2009) of the Leavey School of Business, Santa Clara University. Kouzes and Posner are the authors of *The Leadership Challenge*, *Credibility*, *The Truth About Leadership*, *A Leader's Legacy*, *Encouraging the Heart*, and *The Student Leadership Challenge*, among many other works. They also developed the high-acclaimed *LPI®: Leadership Practices Inventory®*.

10:15–10:45

CALIFORNIA FOYER

Break with Author Book Signing

JIM KOUZES & BARRY POSNER

10:45–12:15

PLAZA

Model the Way Sessions

KNOWLEDGE & SKILLS SESSION

Good to Great: Moving the Needle through Leadership Development

ERIN DESTEFANIS & ASHLEY KUBACK



The core purpose of the National Association of Colleges and Employers is to serve as the primary resource to those working with the college-educated seeking employment. This purpose is realized through strategic initiatives which seek to expand both internally and externally the value of leadership development of its constituents and staff.

Using the Leadership Challenge as the foundation for leadership, NACE has developed four core leadership development programs grounded in adult learning principles, practical and tactical strategies, and action-planning to empower individuals and organizations while crossing all industries, roles, and functions to continue to advance the body of knowledge related to working with the college educated with an internal and external approach.

Erin DeStefanis serves as the senior manager for professional development for the National Association of Colleges and Employers (NACE). She completed the LPI Coach Training in 2015 and has since served as a faculty member for the NACE Management Leadership Institute and Recruiter Leadership Institute.

Ashley Kuback is the Business Development and Outreach Manager at NACE, National Association of Colleges and Employers.

CASE STUDY SESSIONS

LA JOLLA



Future Growth and Sustainability: The Five Practices of Exemplary Leadership in Action

TEO JIN LEE

This case study will showcase how CapitaLand, one of Asia's largest real estate companies, leveraged the Five Practices of Exemplary Leadership to help lay the foundation of its Leadership Development Model. Headquartered and listed in Singapore, CapitaLand has a presence in more than 110 cities across 20 countries with over 12,000 employees.

In 2014, CapitaLand started work towards developing and aligning its existing and future leaders across different levels and geographies through the ONE CapitaLand concept. Integral to ONE CapitaLand were two tenets: The CapitaDNA that encapsulated the Core values of CapitaLand; and the ONE Leadership Model with its incipency in the Five Practices of Exemplary Leadership. Spearheaded by the Group CEO, the goal was to build leaders throughout the organization in a consistent and sustainable manner, despite a constantly changing workforce.

ODE Consulting worked with CapitaLand to help integrate the Five Practices of Exemplary Leadership into the CapitaLand Leadership Development Model (CLDM). Subsuming Seven Leadership Practices that were integral to CapitaLand, the official roll-out of the CLDM commenced in 2015. The roll-out, led by ODE Consulting, involved establishing an understanding of the Leadership Practices and behaviors as also develop role models at every level of the organization, both in Singapore and in China. The LPI 360[®] was leveraged to provide leadership insights and identify gaps, which served as a catalyst to drive the change management process thus operationalizing the leadership practices.

Teo Jin Lee, Managing Director/Founder of ODE Consulting, is one of the most successful women in Singapore in the field of Executive Education and Learning. Starting her career with IBM, in 2001 she was among the top 10 winners of the Woman Entrepreneur Award and in 2016 the winner of the AP Entrepreneurship Award for Business Services.

SANTA FE



Organizational Cultural Transformation Using TLC—A case study

SHRIDHAR SAMPATH

We will demonstrate how The Leadership Challenge and LPI was the foundation based on which the company's leadership team re-discovered their organizational values and re-created their shared vision. Then we will also demonstrate how the company rolled out the values, vision and mission to the entire company of over 1000 people in a phased manner across 5 countries. The Leadership Challenge has been used to empower senior and middle leadership teams with the mindset, skills and language to be able to lead the company as it grows across geographies.

Shridhar Sampath—Certified-Master-in-Training, Lead consultant and Corporate educator—led the transformation from the consulting side.





ACTIVITY SESSIONS

SIERRA



Using Well-known Definitions to Trigger Deep Explorations into What We Value

DEANA RAFFO

The way we define leadership—the words and phrases we use and their implied meanings—says something about how we view leadership and what we value in a leader. Even prominent leadership scholars do not agree on how leadership is defined (Northouse, 2016). Since there's no single definition of leadership, how we define it becomes personal and says something about who we are, what we value, and the message we want to send to others as we express our views about leadership.

In this experiential learning activity, participants will examine six very different, prominent definitions of leadership, including Kouzes and Posner's definition. This activity is a great starting place to talk about what leadership is (and isn't), how it differs from management, diverse viewpoints of leadership, and an introduction to Kouzes and Posner's definition. But perhaps most importantly, this activity offers a conduit to a discussion that how we define leadership says something about what we value in a leader. It segues from discussion about "What is leadership?" into one that explores our core values.

Kouzes and Posner say that exemplary leaders are attentive to the language and words we use because they are metaphors for concepts that define attitudes and behaviors, among other things. When we are able to understand how we define leadership for ourselves, it empowers us to put it into action.

Deana Raffo serves as Associate Professor of Management in the Jones College of Business at Middle Tennessee State University. With expertise in leadership and personal development and leadership education, she particularly enjoys exploring the introspective qualities in leadership. Her research has appeared in *Journal of Managerial Issues*, *Journal of Leadership Education*, *Gender in Management*, among others. Last year, she was a contributor with a chapter in the book, *Leading with Spirit, Presence, and Authenticity*, with a chapter entitled "Reflection and Authentic Leadership."

DEL MAR



Leadership in Polarized, Provocative, Precarious Times: A dialogue...

SHARON LANDES

As practitioners of leadership and as facilitators, trainers and coaches of leadership we leverage our impact from a foundation of credibility, authenticity and relevance. The work we do, the way we lead needs to feel viable, actionable and relatable to constituents in the real world. The very present and polarizing issues, forces, and personalities at play in our world today call on us to examine how we lead and where we step into leadership.

There are important questions for us to consider: How would we describe the 'times' as a context for leadership? What are the implications for us as leaders? What do we need to understand? What do we need to do? What does values-behavior congruence look like for each of us in these times?

This is the substance of our examination and exploration in the dialogue.

As a way to engage in the inquiry and discovery we will learn and employ key skills for group dialogue—skills that when applied with discipline and intention can allow for all perspectives to be shared and heard, for truly new insights to arise, and for the emergence of shared meaning, purpose or understanding. The practice of dialogue will be both our methodology for the activity, and a tool to practice and employ in our leadership going forward and in our facilitation.

Sharon Landes is a Certified Master of The Leadership Challenge and consultant working for over 35 years, both as an internal manager/executive and an external consultant, with diverse organizations and individuals, world-wide, to enhance their effectiveness, impact, relevance and satisfaction as leaders and individual contributors in their organizations and their communities.

12:15–1:30
CALIFORNIA BALLROOM

Lunch

1:30–2:45

DEL MAR



Inspire a Shared Vision Sessions

KNOWLEDGE & SKILLS SESSION

You Have My Attention but Where Are We Going? Vision as a Springboard to Greatness!

GREG ALLEN & RON SIERS

Vision can be a springboard to greatness, and in this session we will provide insight and applicable action steps for incorporating Inspiring a Shared Vision (ISV) into your organization, based on data and experiential activities utilized within a year-long Academy for Leadership in Education program at Salisbury University. Participants receive a practical review of the research in order to be more effective in developing personal and organizational vision. We will highlight the work of Simon Sinek, Stephen Covey and Kouzes & Posner, and explain the link to transformational leadership as a practical framework for building an understanding of a full range of leadership skills and behaviors.

Ron Siers, Ph.D. is a Department Chair, Associate Professor, and Associate Head Baseball Coach at Salisbury University. Ron is an organizational leadership researcher, professor, facilitator and Trained LPI Coach.

Greg Allen, Ph.D. has a 30-year career finding solutions to environmental issues as a scientist and a program manager. Greg is a leadership scholar, teacher and researcher and recipient of the Joseph M. Rokoh Research Award.

ACTIVITY SESSIONS

Appeal to Others: Using Relationships & Systems to Inspire a Shared Vision

KELLY ANN MCKNIGHT
& DEBBIE NICOL

When helping others see and feel the dream and hope for the future, where do leaders invest their time and energy? Is there an untapped opportunity for leaders to increase people's adoption of the vision? To facilitate extraordinary results, a leader lives in the present, recognizing sources of energy and input from others to facilitate continuous improvement, change and collaboration. This session will provide additional source—human systems theory—to complement ways in which leaders traditionally appeal to others. We will demonstrate, through an interactive experience, that when multiple stakeholders invest, diverse perspectives help create a generative environment with the emergence of Vision 2.0, 3.0 and beyond.

Note: This session is limited to 35 people due to the limitations of the activity

Debbie Nicol, facilitator, coach, change ambassador and author, has committed her life and Dubai-based business, 'business en motion', to increase corporate connection, reconnecting leaders to themselves, their strategies, teams and customers. An avid adventurer, Debbie is a curious, lifelong learner, continually seeking and creating new horizons in the great outdoors!

Kelly Ann McKnight is a Certified Master of The Leadership Challenge® and an Executive Coach from Ontario, Canada. She focuses on assessing the needs of clients and designing programs to develop appropriate skills and abilities. In addition to The Leadership Challenge Workshops and Executive Coaching, she also tackles management development, behavioral profiling and team building.

CASE STUDY SESSIONS

Creating a Signature Story to Inspire a Shared Vision: Using Powerful Stories in Facilitation

VAUNDEE ARNOLD
& RENEE HARNES

Very often, the power in The Leadership Challenge Workshop is the stories that we tell to demonstrate The Five Practices of Exemplary Leadership. But what does it take to develop a "signature story" all your own, that is inspiring and that helps learners connect to a leadership behavior or key concept? In this session, focused on the practice of Inspire a Shared Vision, you will hear powerful "signature stories" and learn the components that make them memorable, and how you can create your own set of stories. We'll look at the research around imagery and storytelling and give you resources to create and share a story that Inspires a Shared Vision.

Vaundee Arnold is a People Developer for Whataburger LLC. She has witnessed firsthand how The Leadership Challenge empowers people to bring their very best to their personal and professional lives every day.

Renee Harness is the founder of Harness Leadership, a Certified Master of The Leadership Challenge®, and key developer of LPI® Coach Training. Working with leaders at every level of an organization, her goal is to engage, inspire, and involve people in making meaningful contributions to their work, their communities, and their worlds.

SIERRA



PLAZA



LA JOLLA



The Leadership Challenge® and the Advanced National Training Program

MARY BEIRIGER & DANIEL YOSCA

The Career Management Division developed the Advanced National Training Program (ANTP) to provide students with a foundation in leadership practices. Using The Leadership Challenge as its foundation, the course leads participants from the big picture of being a leader in the organization, to a narrower focus of applying leadership and mentoring skills through real world cases. Our vision is to develop a group of dedicated individuals ready to step into leadership positions. The ANTP is a course offered at the Department of State's National Foreign Affairs Training Center and is now mandatory training for over 1,000 employees—171 students have completed the class.

Daniel Yosca has been with the US Department of State for 10 years and currently serves as a Branch Chief for the Career Management Division. Daniel has a passion for education and spent 5 years in higher education teaching classes in history and geography.

Mary Beiriger is a Branch Chief for the Career Management Division located in Washington DC who oversees a team of 7 Program Analysts. Mary has over 16 years of government service.

SANTA FE



Secrets of Delivering TLC in Multi-Cultural Organization

CONNIE STEPHENS

This session explores the secrets of delivering The Leadership Challenge for American Axle Manufacturing (AAM), a leading, global Tier-One automotive supplier. Headquartered in Detroit, Michigan, AAM has manufacturing sites and regional offices all over the world—North America, South America, Asia Pacific, Europe. A strong shared vision among the leaders at the top of AAM to cultivate the culture and develop global leaders, enabled Connie Stephens to facilitate high-impact sessions in several locations. This session will provide insight into cross-cultural learning styles, workshop design & pre-work in the cross-cultural context, as well as delivery across multiple, global locations.

Connie Stephens is the President of HeadStart Consulting Inc. in Shanghai, China. As a Certified-Master-in-Training, Connie has been working hard for the past two years to bring the Leadership Challenge to Shanghai and beyond. She is also an ICF certified PCC with over 3000 coaching hours.

2:45–3:00
CALIFORNIA FOYER

Break

3:00–4:15

Challenge the Process Sessions

KNOWLEDGE & SKILLS SESSIONS

DEL MAR



Virtual Facilitation

BETH HIGH

This session will focus on the virtual delivery of an overview of The Leadership Challenge as part of a National Leadership Conference. The Dorothy Wylie Health Leaders Institute (DWHLI) has been operating for 17 years with The Leadership Challenge and the Five Practices as a major part of the conceptual framework underpinning the Institute. Over 2500 Canadian healthcare leaders have completed the Institute requirements and have considerably improved their leadership skills and abilities as a result, taking on greater responsibilities in the healthcare system.

In past years, Barry Posner provided a one-day Keynote that was very well received by participants. In 2016, constraints required that we look at different models for delivering this part of the Institute. As a result, we tested out a virtual offering with Beth High. This virtual piece was followed by an in-person application of the LPI Self with dedicated structures and time for the creation of a personal leadership development plan.

This virtual delivery format challenged the process of typical workshop structures and successfully incorporated a variety of personal and group activities to strengthen application of the practices in Canadian health care environments.

We will describe:

- The process we used
- Evaluation criteria and results
- Best Practices we identified
- Constraints recognized
- Opportunities we see for future use

Participants will leave with a handout of the bullet points defined above.

Beth High is a Certified Master of The Leadership Challenge®. She consults internationally and delivers a wide variety of The Leadership Challenge programs in a variety of formats, from webinar series to long term blended learning programs. She co-designed The Student Leadership Challenge Certification Program and worked on the 2nd edition of the book.

SIERRA

**CRA—An Innovative Thinking Tool that Revamps your Business****TERENCE YEUNG**

In this session, CRA, a simple yet powerful thinking tool that helps challenge long standing tradition in almost any kind of organizations will be introduced. CRA can also be used to generate innovative ideas. Organizations which used this tool appropriately yield such great benefits as cost savings (we have seen great example with millions of dollars of savings) or total revamp of business model (we have seen example of creation of new business unit). Actual cases on how organizations leveraged this tool to reap these benefits will be revealed. Not only will this tool be introduced in details, the logic behind and application examples will also be shared. What's more, you will have chance to try to apply this tool in situation relevant to your own and receive feedback.

This tool is particularly related to the "Challenge the Process" Practice of The Leadership Challenge as one of the main purposes of this tool is to challenge long standing tradition of organizations to produce innovative ideas.

Terence Yeung, Certified Master in The Leadership Challenge, led TACSEN to become the only training company elected "Hong Kong's Most Valuable Company" in 2012, and ranked 8th in China Training Industry in 2015. He works with leaders in Asia and is a frequent speaker in large conferences in Hong Kong and China.

CASE STUDY SESSIONS

SANTA FE

**Challenging the Process—Different Cultures, Powerful Results****GRAHAM MOORE**

We all know the value of leaders at all levels Challenging the Process. But how does that apply for leaders in different cultures, often leading multiple different cultures.

Graham Moore, Certified Master based in Dubai, explores this in interviews with three successful leaders from three countries in the Middle East.

Basheer Hashem

Director—Academy
Saudi Human Resource Development Fund

After a life-changing and near-fatal car accident for this high achieving sportsman, Basheer realized that he had to Challenge the Process to turn his life around.

In this presentation, we will explore Challenge the Process is a critical process in his life, how Basheer was exposed to challenges for the significant changes confronting Saudi Arabia, as recently as 3 years ago and he will share with us how Challenging the Process is a constant mind-set for him as he takes the HR Fund Academy to further to develop Saudi leaders across a number of key areas.

Basher will be 'live' from Riyadh for this presentation, enabling questions and interaction with delegates in this Breakout. (At 2 am Riyadh time !)

Niousha Ehsan

How this CEO recognized that she needed to Challenge the Process three years ago and as a result her company was awarded Employer of Choice SME Middle East (2016) and Best Workplace (2017) – along with other awards.

Leading a team which comprises 16 different nationalities, Niousha outlines how she has developed a company-wide culture of Challenging the Process, now actively embraced and driven by all staff – and as a result, the company has shown spectacular growth over the last 3 years.

Mickey Patel

Senior Finance Manager of one of the companies in one of Oman's leading Corporations, Mickey is on a quest to have his department recognized as THE department of choice in the organization. He outlines the challenges of Challenging the Process across different cultures.

Graham Moore is the first Certified Master in the Middle East. Independently validated in 2009 as being in the top 1% of facilitators globally for delivering Learning Effectiveness.

LA JOLLA



Challenging the Process: Preparing Leaders for a Digital Transformation

AMANDA AGHDAMI

In preparing itself to be a leading digital company, Capital One embarked on a novel leadership development program, created initially for its VP level executives. Using The Leadership Challenge as its foundation, the Card Talent Acceleration program was designed to create transformational leaders, to literally help transform the company into a digital enterprise, while equipping all to succeed and thrive in the new environment. This was not a typical development program. Its purpose was to create the new kind of leaders the business must have to excel in a rapidly changing world. We will discuss five areas we believe are most crucial in creating transformational leaders (our Talent Profile), and how The Five Practices provide much of the core learning in these areas.

In developing this program, we are Challenging the Process by taking lessons from top digital companies:

- Product Focus: Integrated with mission and goals of the company
- Continuous Flow: Designed for continuous learning vs. once and done
- Agile: Using agile principles allows us to incorporate new learnings in real time
- Open Source/Inclusive: Accessible for all leaders (not just HiPos)

We are also encouraging our senior leaders to model the way and teach which delivers incredible context and provides real-life examples. We are focusing deeply on trust-building and horizontal leadership across organizational silos as these competencies are critical to building customer advocacy across the life-cycle.

Our leaders are facing similar challenges and this will provide them with creative new ways to think about their approach to their own transformation.

Amanda Aghdami is a Managing Vice President of Marketing Operations within Capital One's Card Division where her team works to deliver products and features that customers love. At Capital One, she is also very passionate about helping leaders transform and recently earned her Certificate in Leadership Coaching from Georgetown University.

PLAZA



Getting Even Better Outcomes by Challenging How You Design & Deliver TLC

KRISTA SKIDMORE

Vera Bradley knows about change. From its early basement beginnings as a cottage industry selling unique luggage to its now profitable and publicly-traded, global, retail enterprise, Vera Bradley has enjoyed colossal growth. With a new CEO and strategy to continue this trajectory, we knew it was time to Challenge the Process.

We'd already delivered a program for three cohorts with good success—strong reassessment results, plus strong retention levels. The company strategy would require greater innovation and execution, so we needed experiment with the tried and true. We needed to move away from a "good program" to weaving the concepts of TLC into the cultural fabric of the organization.

So, we challenged how we designed and delivered TLC at two levels:

1. Micro-level: we concentrated on changes to the program design and participant experience, including engaging the participant's manager and deeper specificity within development plans. This culminated in a 12-month TLCW program called Leaders by Design.
2. Macro-level: we created a guidebook to depict how being a better leader would help us achieve our strategy. By more deeply embedding the concepts of TLC into our culture, we illuminated the path leaders would take to "power performance through people."

After implementation of changes, we achieved more than a 275% positive change in reassessment results with a 78% participant promotion rate.

In this session, we'll share the research, process, components, and tools we used, along with the leadership-culture guidebook, which we believe were the difference-makers in moving from good to extraordinary results.

Krista Skidmore: Inspired by the way good leaders improve the lives of the people around them; Krista cofounded FlashPoint, a global training partner of The Leadership Challenge®. A Trained Facilitator of The Leadership® Challenge, she is an expert at designing, measuring, and implementing development experiences that elevate team members' potential and get real outcomes for the organizations she serves.

5:30–7:00
GARDEN TERRACE

Networking Cocktail Reception

7:30–8:00

SIERRA

Activity

Yoga for Leaders

8:00–9:00

PLAZA

Continental Breakfast**9:00–10:15**

CALIFORNIA BALLROOM

Keynote**It's All about the People****GARRY RIDGE**

It's often said, with nods of wise agreement, that any organization is nothing without its people. Countless books and courses on leadership, over many decades, address this well-known and accepted axiom.

Then why are nearly 70% of all employees in the U.S. disengaged at work? Clearly, the conferences, books, courses and motivational speakers are insufficient to make a difference.

This session by WD-40 Company CEO Garry Ridge will be a look "under the hood" of one of the world's most recognized brands, where employee engagement is above 93%, 98% say they "love to work at WD-40 Company", and 99% say that their "opinions and values are a good fit" for WD-40 Company. This high engagement has resulted in a company that has doubled in revenue in the last decade, and is on a trajectory to double again in the next.

Garry will share his company's "learning moments" over the course of his efforts to transform the company's culture, beginning in 1997. Lessons and principles covered include:

- The personal journey of every servant leader, and why that philosophy is critical
- The emotional connection of a greater purpose that creates high engagement
- How to carefully and consciously choose values that will be embedded in all aspects of leadership and employee development
- Why investing in people who invest in themselves is a secret to succession planning and greater organizational capability
- The difference between a "team" and a "tribe", and why WD-40 Company strove to create a cohesive tribe that spans 15 countries where employees work
- How company performance results are directly connected to its focus on people

10:15–10:30

CALIFORNIA FOYER

Break**10:30–11:45**

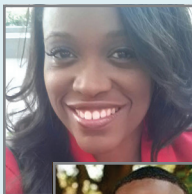
DEL MAR

Enable Others to Act Sessions**KNOWLEDGE & SKILLS SESSIONS****Taking Care of the Leader****ROBERT LUCANIA**

One of the topics rarely covered in leadership workshops is maintaining a healthy lifestyle. When the leader's health breaks down their abilities become limited and the team becomes ineffective. Leaders must be physically fit and mentally alert to effectively enable others to act and make sound decisions. To maintain this state they need tools to control stress, time management and fitness. This presentation will cover the basic tools required for time management, diet, sleep, fitness and stress management.

Bob Lucania is a retired Air Force Colonel with over 35 years in the medical field and 20 years of senior leadership experience. He is currently Director of the United States Army Bavaria Medical Department Activity's Mild Traumatic Brain Injury Program where he interprets and formulates policy while overseeing five Army clinical programs throughout Bavaria, Germany.

LA JOLLA

Identifying and Addressing Conflict: Reflections on enabling others to create change through collaboration**KAREN HAROLD & MAURICE EL AMRANI**

Enabling Others to Act when resolving conflict is about empowering others rather than taking control or overpowering. To build trust in an organization it is important for leaders to provide opportunities for teams to work through conflict with their guidance and support. If leaders can encourage trust among team members, develop a team identity, and create a sense of group efficacy, when conflict develops teams can act on their own with the support and encouragement of their leaders. By design, everyone involved in the conflict can be an active contributor to the problem-solving process.

Karen Harold is an internationally best-selling author, private mediator, professional facilitator, and the founder of Conflict Coaching Company. Known as "The Conflict Coach", Karen specializes in resolving high conflict personal and professional dispute resolution and conflict resolution coaching.

Maurice El Amrani is a former Marine and Communications major.

CASE STUDY SESSIONS

PLAZA



**Growing Servant Leaders in the Aging Services Industry:
A Powerful Partnership Shows How It's Done**

**BILL MUGAVIN &
EMILIE PERKINS**

The world is experiencing a global leadership crisis and organizations in every industry—human services included—are feeling its effects. LeadingAge Indiana, part of a nationwide association dedicated to making America a better place to grow old, is a membership organization of nonprofit providers of long term care, social services, and housing for the elderly in Indiana.

Association leaders realized that their member organizations were experiencing an exodus of experienced and knowledgeable leaders as growing numbers of Baby Boomers are retiring. They found that few of their member organizations had a bench of leaders who were ready to take the helm as experienced leaders retired. In addition, most organizations didn't have the budget or capacity to implement in-house leadership development programs. To close this leadership gap, LeadingAge Indiana partnered with FlashPoint to help custom-design a multifaceted, highly interactive nine-month leadership development program, LEADERSHIPVIP, based on The Leadership Challenge® Workshop.

In this session we'll share how we developed this comprehensive program. We'll delve into LeadingAge Indiana's noble purpose, the challenges the association faced, the LEADERSHIPVIP program goals, the rigorous participant selection criteria we developed, and how we integrated the multiple components of the program. We'll share empirical success measures such as pre/post LPI scores and participant promotion percentages. We'll also share qualitative success measures through video testimonies and stories from program participants and their managers about the pay-it-forward impact this Leadership Challenge experience has had on their organizations, their elderly residents, and the human services industry in general.

Bill Mugavin has more than 25 years of management experience in the nonprofit, financial, and pharmaceutical industries. His background includes operations management, training, and international consulting at large global firms, including HSBC North America, so he understands what it takes to successfully drive performance in complex businesses. At FlashPoint he helps clients achieve their goals through results-oriented leadership development initiatives.

Bill has master's degrees in education and in training and performance improvement. He's a Certified Professional in Learning and Performance (CPLP), a senior professional in Human Resources (SPHR), and a Society for Human Resource Management Senior Certified Professional (SHRM-SCP).

Emilie Perkins has over 19 years of experience in event planning, and fundraising in the non-profit sector, and marketing and design in the for-profit arena. She joined LeadingAge Indiana in December 2001 as the Director of Training and coordinates all professional development training, conferences, trade shows, and seminars; and was promoted to Vice President of Training in 2015. She also is an Associate Faculty member at Indiana University Indianapolis where she co-teaches Non Profit Meeting Management for the Department of Tourism, Conventions and Event Management.

SANTA FE



**Growing Leaders Using Internal Coaches—
A Case Study from First Command Financial Services**

KAREN ATWELL

This session explores the methods which have been used with great success within First Command Financial Services to develop and grow stronger leaders using an internal cadre of coaches.

Here's what participants will learn from attending this break-out session which will be presented by Karen Atwell (ICF Professional Certified Coach):

1. How First Command created a meaningful program to develop stronger leaders using the LPI-360, the Leadership Challenge Workshop and other leadership tools to build stronger senior leaders and prepare new leaders field offices.
2. How First Command develops and trains their internal coaches to reinforce key learnings required in field leadership roles.
3. The learning model First Command uses and how it connects to the core values of the organization.
4. How variations of the Leadership Challenge are used to develop leaders. TLCW—Two-day, TLCW—One Day, One-on-One Coaching
5. Final Thoughts on the power of using internal coaches to bringing the Leadership Challenge message to First Command Financial Services

Karen Atwell is the Vice President of Leadership & Talent Development for First Command Financial Services and a Professional Certified Coach. Karen has been working hard for the past two years to bring The Leadership Challenge to leaders around the country in both field offices and in headquarters in Fort Worth, TX.

SIERRA



EXPERIENTIAL ACTIVITY SESSION

Using the FLOW to Engage Your Workforce

CARMELA CRAWFORD & RICHARD PELAY

Enabling Others to Act is based on the assumption that you are able to give people meaningful and challenging activities. We facilitate programs for senior leaders who are uncomfortable delegating and feel they can do things better if they do everything themselves. During our program we have the participant complete the LPI and identify their strengths and challenges which are often in the Enable Others to Act practice. The following exercise allows leaders to learn an easy, straight forward method for moving work off of their plate while Enabling Others to Act.

Our training for Enable Others to Act has five steps:

- Using a preprinted poster, have the attendees work through the different sections of the FLOW diagram. We facilitate comments on how they would feel in the area above/below the FLOW and then we fill in the poster.
- Using a worksheet we have created we take our attendees through an exercise where they not only identify their percentages on the FLOW also the percentages of their subordinates
- We then lead a discussion where we help the leaders identify why their percentages are not optimum
- We facilitate table discussions on which activities can be shifted from their plate to their subordinates
- Finally we discuss the methods for helping them shift appropriate activities

Carmela Crawford is currently a Leadership Development Executive at ADP Total Source where she is responsible for leadership training and organizational development for our TotalSource Client companies, working primarily with senior leaders. She has more than 30 years of experience in human resources, consulting, finance and technology.

Richard Pelay is a Field Learning Consultant at ADP TotalSource where he is responsible for delivering high impact leadership development programs for mid-to-senior level leaders. He has more than 20 years of experience in service operations, implementation, and learning and development roles.

11:45–1:00

CALIFORNIA BALLROOM

Lunch

1:00–2:15

DEL MAR



Encourage the Heart Sessions

KNOWLEDGE & SKILLS SESSION

What about Love? Reinvigorating the 7 Essentials of Encourage the Heart to Engage Higher Performance

MILTON ALMEIDA & SHERYL HANSEN

Let's talk about Love. At the Northern Alberta Institute of Technology (NAIT), people matter.

Come learn what one of Canada's leading polytechnics has been doing to help clients integrate the Encourage the Heart actions of setting Clear Standards, Expecting the Best, Paying Attention, Personalizing Recognition, Telling the Story, Celebrating Together, and Setting the Example.

At NAIT, The Leadership Challenge is our core leadership development tool. We run the Leadership Challenge throughout the school year and have trained over 200 staff members and conducted upwards of 100 LPI's. The Leadership Challenge is integrated into our four leadership development streams of Leading Self, Leading Others, Leading the Team, and Leading the Business.

In reviewing our NAIT-wide LPI scores, we found that we could be doing better. We know that Encouraging the Heart increases performance, builds resiliency, and improves our health. One way we thought we could increase our scores was to deliver the Encourage the Heart workshop to our staff members. In preparing the workshop, we incorporated Chapman's work on the 5 Languages of Appreciation in the Workplace and linked them to both the LPI behaviors and the seven essentials of Encourage the Heart.

The impact of this workshop has been significant. Participants reported that they finally understood the importance of not only Encouraging the Heart but also how to do it effectively. Learning that we all speak a different love language has led to stronger relationships both at home and work.

Milton Almeida (ACC, M.A., Doctoral Candidate) is a seasoned organizational consultant with over 15 years of experience of working in a variety of industries. His main focus lies in leadership development, change management, and strategic planning.

Sheryl Hansen has a long history in the fitness and education industries allow her to bring a wealth of experience to the classroom. Her current work is in staff training and leader development, mentorship, and facilitating groups.



CASE STUDY SESSIONS

PLAZA



Recognizing the Unsung Heroes: A Case Study from Kentucky School Districts

RHONDA CALDWELL & TOM PEARCE

This session explores the techniques that have been used with great success within various school districts throughout Kentucky and the Kentucky Association of School Administrators (KASA), an organization of 3,000 school leaders, to encourage the hearts of the hard-working souls who keep the schools running each and every day. This case study is the story of how Kentucky school leaders and KASA developed a meaningful recognition program to lift up those employees and volunteers who are often the unsung heroes of a school district, but are known for making a positive difference, living life by a higher standard and serving others.

Dr. Rhonda Caldwell, CAE, is the deputy director of the Kentucky Association of School Administrators in Frankfort, Kentucky. Caldwell co-authored her first book, "A Guide to Kentucky's NxG Leadership Series for Onboarding New Superintendents," as part of her doctoral thesis. She has received various state and national awards and was selected for two Education Delegations to China (2009, 2017) and has studied the Finland (2012) and Ontario (2014) education systems. She is currently pursuing certified master status to bring The Leadership Challenge® to Kentucky's education leaders.

Tom Pearce is a Leadership Coach who works with iLead Consulting & Training. He works with leaders and teams around the world to build stronger teams, healthier organizations, and better leaders. His personal mission is to "amplify the greatness in others." Tom is a Certified Master who lives in McKinney, Texas.

SANTA FE



With the Wave of the Wand—How The Leadership Challenge Positively Impacted Team Member Satisfaction at Universal Orlando

KIRSTEN ABBOTT-WEST

In 2010 with the opening of The Wizarding World of Harry Potter, Universal Orlando began a journey to be recognized as having the best guest service in the themed entertainment industry. The company focus on the value chain that Team Member Satisfaction leads to Guest Satisfaction leads to fair and reasonable profit needed support from a robust, practical, research-based leadership behavioral model and tools. With the launch of The Leadership Challenge workshop in September 2014, significant impact has been seen in overall Team Member satisfaction and engagement. This session will highlight the specific journey and impact on the Marketing & Sales Division and share tactics that continue to impact Team Member satisfaction and engagement by focusing on the practice and behaviors of Encourage the Heart. When asked "what 3 words would you use to describe the culture of Universal Orlando?"—the number one word put forth from 13% of over 16,000 Team Members was FUN. FUN is a value at Universal Orlando and reinforced with both global programs, and by leaders daily demonstrating the behaviors of the Practice "Encourage the Heart". This session will have FUN components of its own, while sharing company practices that have helped lead Universal Orlando to an overall 85% overall engagement score for its Team Members.

Kirsten Abbott-West is currently the Director of Talent Development, Leadership and Back of House, for Universal Orlando Resort, and has been in the hospitality/entertainment industry for over 30 years. She is responsible for driving overall strategy and execution of Leadership Development across the Resort. She is also a newly minted Certified Master of The Leadership Challenge.

SIERRA



ACTIVITY SESSIONS

Nuggets and Pearls: A Ring of Engagement Using the Power of Affirmation

ALAN LYME

Nuggets and pearls represent the words and deeds of affirmation that are so easily overlooked and yet so effective in building trust and cohesiveness in any team. The core principles and building blocks of Motivational Interviewing (OARS: Open questions, Affirmations, Reflections, and Summaries) will be reviewed, with particular attention placed on the efficacy of affirmation. Through guided real-play participants will experience the power of intentional affirmation delivery in leadership, and will leave with a new found awareness of and appreciation for a well-placed word.

This session will amplify easy to institute communication skills that touch on three behaviors that support ETH: "Makes it a point to let people know about his/her confidence in their abilities", "Praises people for a job well done" and ""Gives the members of the team lots of support and appreciation for their contributions"

"Affirmation of strengths can in itself bolster self-esteem and confidence. Affirming a person's strengths is a way of bolstering hope and confidence when someone is short on it." Motivational Interviewing: Helping People Change (3rd Edition, p 216) W.R. Miller and S. Rollnick, Guilford Press 2013

Alan Lyme, LISW, ICADC, ICCS, MAC, brings respected and innovative clinical and program management skills as the Director of Training for the Phoenix Center in Greenville, South Carolina. He is a co-author on the 2013 book "Game Plan: A Man's Guide to Achieving Emotional Fitness". Alan is a member of MINT (Motivational Interviewing Network of Trainers), an Internationally Certified Clinical Supervisor, a Master Addictions Counselor, and a Certified-Master-in-Training of The Leadership Challenge.

2:15–2:30

CALIFORNIA FOYER

Break**2:30–3:45**

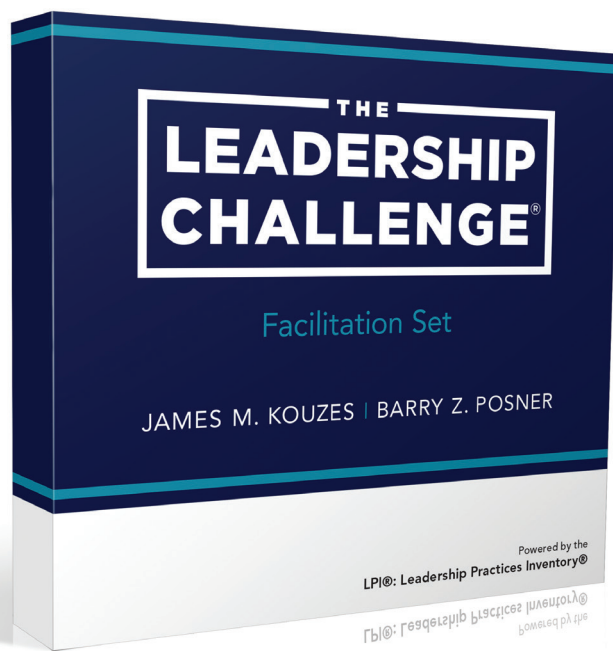
CALIFORNIA BALLROOM

Closing Session**Bringing it All Together**

The 2017 Forum may be closing, but another door is opening on your journey as a leadership development professional. As we do in every The Leadership Challenge® Workshop experience, we are concluding with a review of what we learned and a request to make a commitment to apply those lessons in your work as a coach and facilitator. And we're going to take it one step further. We're going to ask you to make a personal commitment to Jim and Barry, and one of them will send you a note in 30 to 45 days asking you how you did in following through on your commitment. We'll also spend a few minutes in this closing general session expressing our gratitude and appreciation to each other and to the conference planners, as well as celebrating the successful conclusion of the tenth The Leadership Challenge Forum.



THE ENTIRE SUITE OF THE LEADERSHIP CHALLENGE FACILITATION MATERIALS NOW IN A SINGLE PRODUCT



\$1,299 USD • ISBN: 978-1-119-39430-3

The **Leadership Challenge Facilitation Set** contains the entire suite of fully-developed workshop tools, based on The Five Practices of Exemplary Leadership®, the acclaimed leadership framework by Jim Kouzes and Barry Posner, and powered by the LPI®: Leadership Practices Inventory®. Now, all in one place for the first time, this comprehensive talent development package provides organizations of any size with the high-impact, ready-to-implement solutions needed to build a common language of leadership and unleash the potential to lead in every individual at every level.

Over 40 hours of time-segmented workshop content and more than 100 experiential activities provide trainers and coaches with unlimited possibilities for customization. Each workshop can be delivered as a standalone program or serve to complement a larger initiative.

INCLUDES

- The Leadership Challenge Workshop
- LPI: Leadership Practices Inventory Debrief
- Leadership Is Everyone's Business Workshop (updated for the first time since 2006)
- The Challenge Continues Workshop (updated to include LPI Reassessment Report debrief)
- LPI Action Cards Facilitation Guide
- The Leadership Challenge Values Cards Facilitation Guide
- The Leadership Challenge Activities Guide

Place your order by contacting your training products provider, emailing leadership@wiley.com, or calling 1-866-888-5159.

INTRODUCING THE LPI 360+



What is the LPI 360+?

Much like the LPI 360, the LPI 360+ is an assessment tool to help individuals—with input from selected observers—assess their leadership competencies as measured by The Five Practices. In addition to the one-time leader and observer assessments, the 360+ provides leaders with the opportunity to complete the LPI a second time (within an 18-month period)—a second administration of the LPI has been found to be critically-important to any ongoing leadership development initiative.

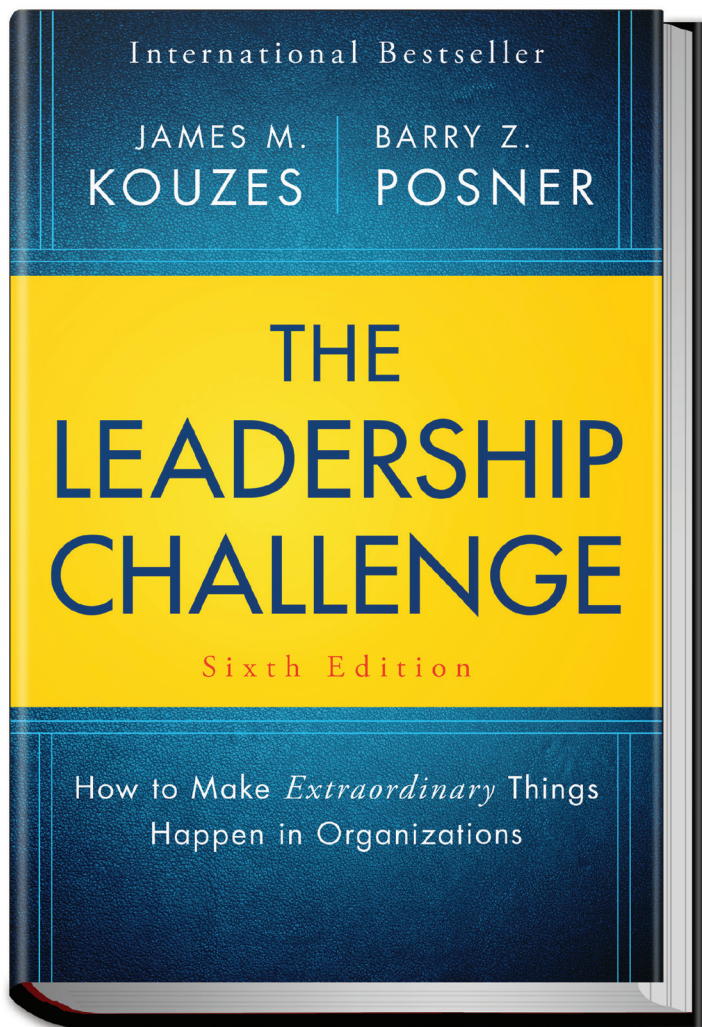
PRODUCT FEATURES	LPI 360 Online (Existing Product)	LPI 360 Online (Two LPI 360)	LPI 360+ Online (New Product)
		\$170	\$340
License Term	12 months	12 months (each token)	18 months
Administrations of the LPI 360	1	2	2
LPI 360 Individual Report	✓	✓	✓
LPI 360 Re-Assessment Report	⊘	✓	✓
TLCW Online Pre-Work	✓	✓	✓
LPI Development Planner*	✓	✓	✓
LPI Participant Handouts*	✓	✓	✓
TLC Vision Book*	✓	✓	✓
TLC Practice Book*	✓	✓	✓
The Challenge Continues Participant Handouts*	⊘	✓	✓

Contact your training products provider, leadership@wiley.com, or call 1-866-888-5159 to place your order today.

THE ROAD MAP FOR BECOMING AN EXEMPLARY LEADER

"I love *The Leadership Challenge*! This is the book on leadership that I recommend to all of my clients"

- Marshall Goldsmith, bestselling author of *What Got You Here Won't Get You There*, *MOJO*, and *Triggers*



The all-new edition
of *The Leadership Challenge*
has been completely updated:

- Nearly 70% new content
- 75% new figures and tables
- A full-color design for the first time

Learn more at

www.leadershipchallenge.com/TLC6

Visit our bookstore in the Santa Fe Foyer
to purchase additional copies
and view other titles available.

Available wherever books are sold.

Jim and Barry will be personalizing books
in the Santa Fe Foyer on Thursday,
June 15th from 10:15am to 10:45am.



How do you celebrate The Five Practices of Exemplary Leadership®?



 **FORUM** 2017
SAN DIEGO, CALIFORNIA · JUNE 15-16

#tlcforum17