

ACCOUNTABILITY IS NOT ENOUGH

CRAFTING THE SOUL OF YOUR COMPANY TO WIN

Vistage 2025
Jon Chen



**63% OF MANAGERS FAIL
TO HOLD OTHERS
ACCOUNTABLE
EFFECTIVELY**

-HARVARD BUSINESS REVIEW



**69% OF THE GLOBAL
WORKFORCE IS
DISENGAGED**

-GALLUP 2023



**MOST COMPANIES
HAVEN'T CREATED
SOMETHING WORTH
CARING FOR**



**YOU CAN'T HOLD PEOPLE
ACCOUNTABLE INTO
GREATNESS. YOU HAVE
TO INSPIRE THEM INTO IT.**



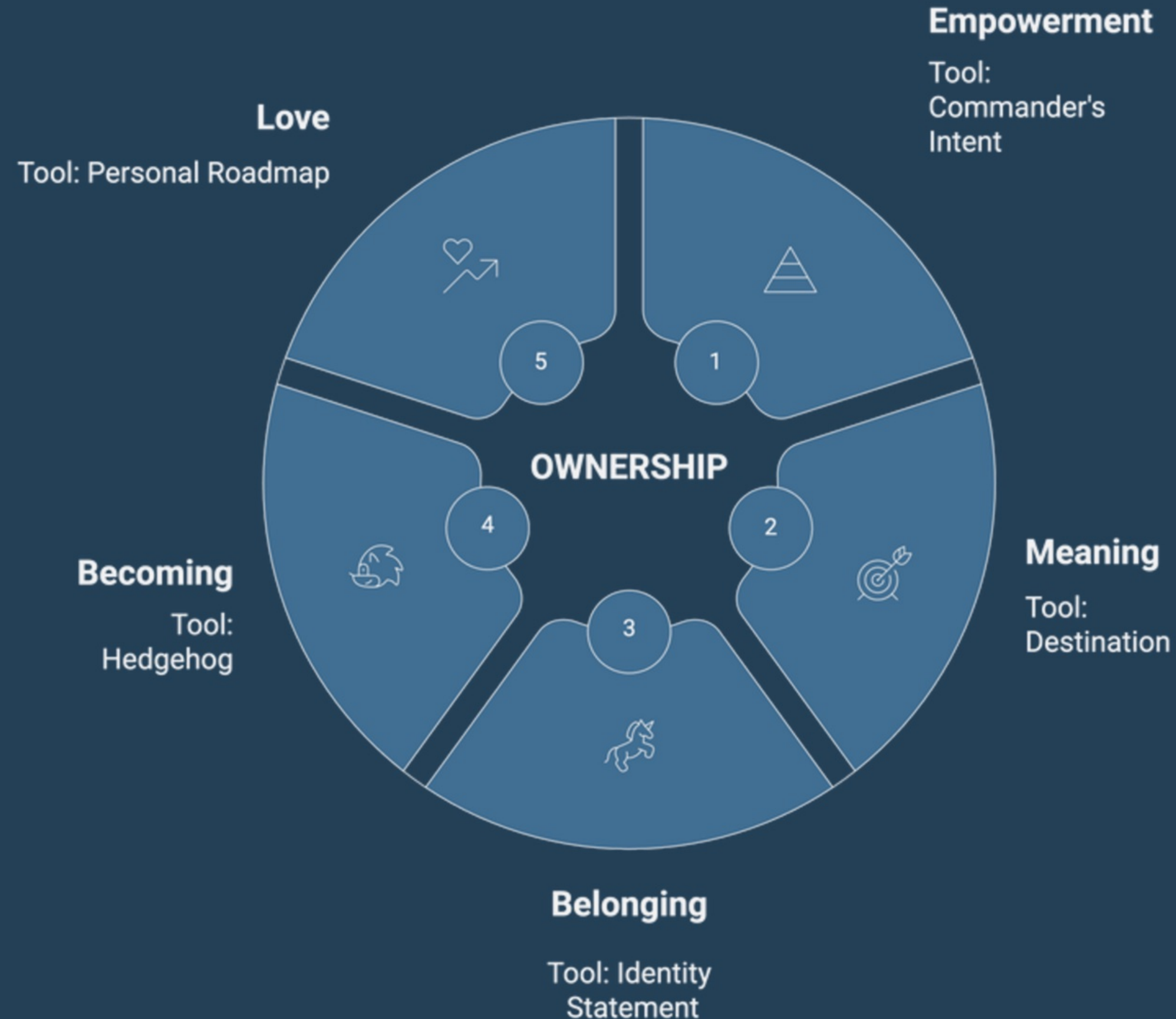
**BUILD A COMPANY YOUR
EMPLOYEES**

LOVE

AS MUCH AS YOU DO



CRAFT THE SOUL OF YOUR COMPANY



LEADERSHIP

VISTAGE DECISION MODEL



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

OUR AREA OF EXPERTISE



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

SYSTEM

DESIGN

CADENCE

SCORE



SYSTEM

SOUL

DESIGN

DESTINATION

CADENCE

IDENTITY/ETHOS

SCORE

PEOPLE





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

-GALLUP



**“COMPANIES THAT EXCEL AT
ENGAGEMENT DELIVER 2.5X HIGHER
SHAREHOLDER RETURNS THAN
THEIR PEERS**

-MCKINSEY & COMPANY

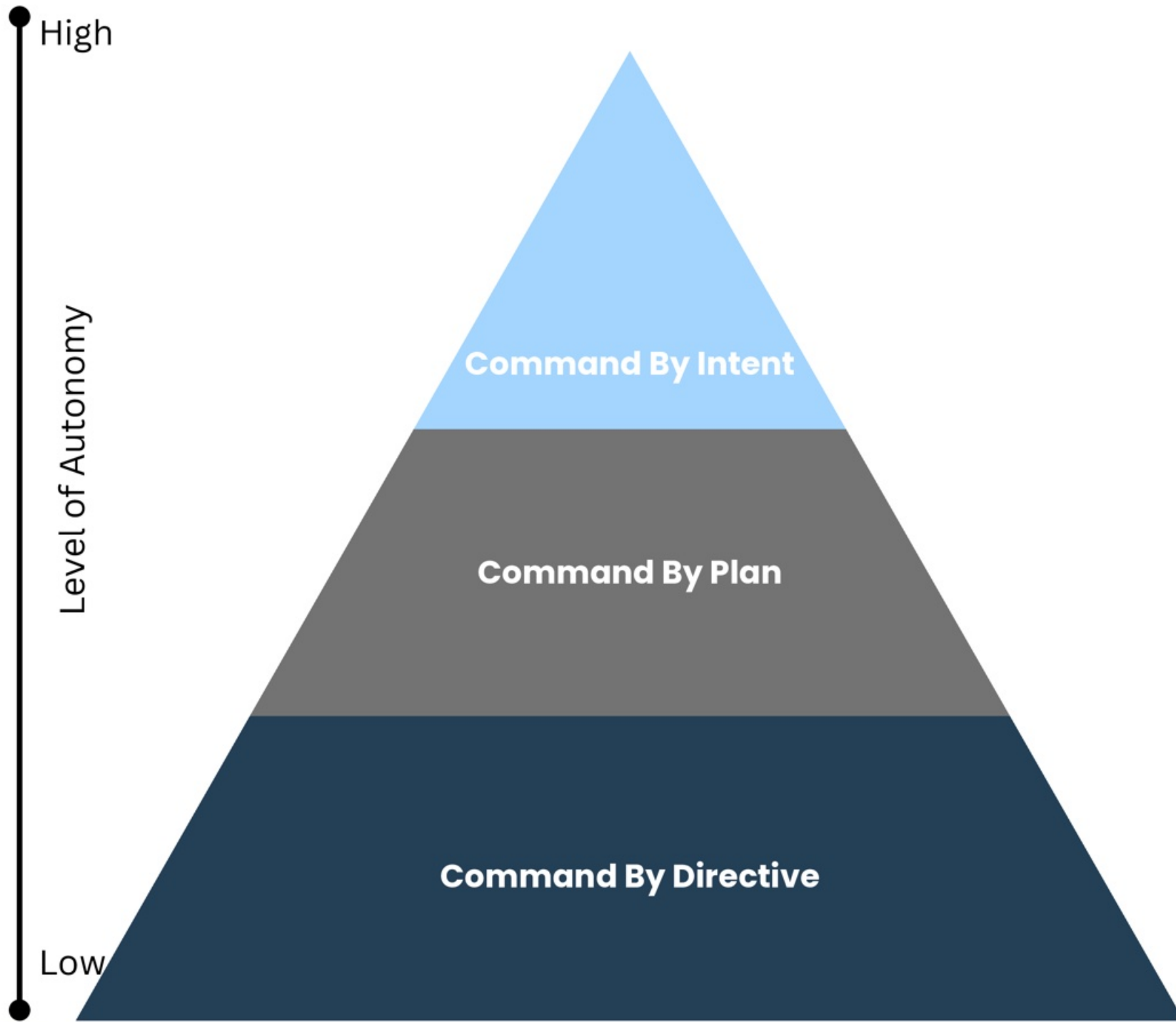


**COMPANIES WHERE EMPLOYEES
FELT EMPOWERED WERE
85% MORE LIKELY TO
INNOVATE**

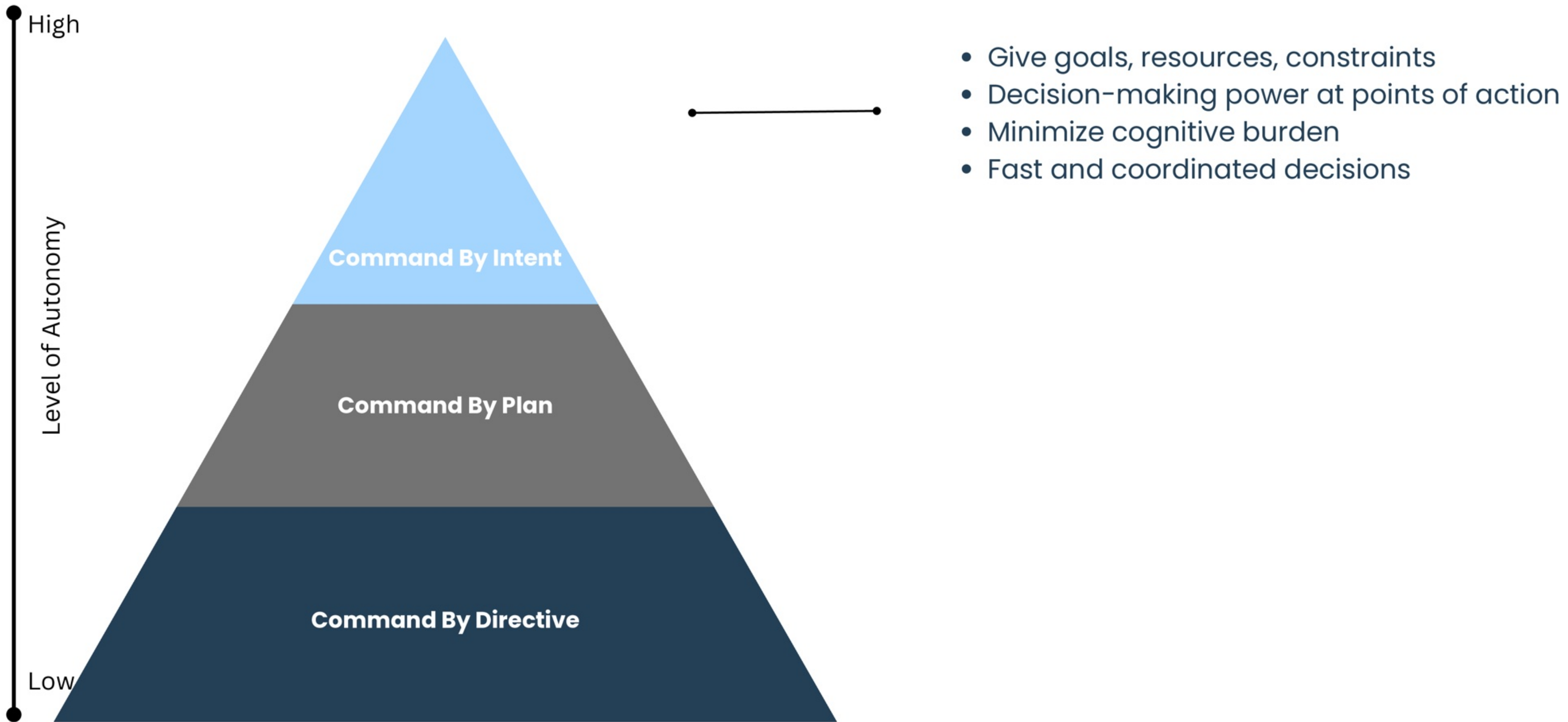
EMPOWERMENT: COMMANDER'S INTENT



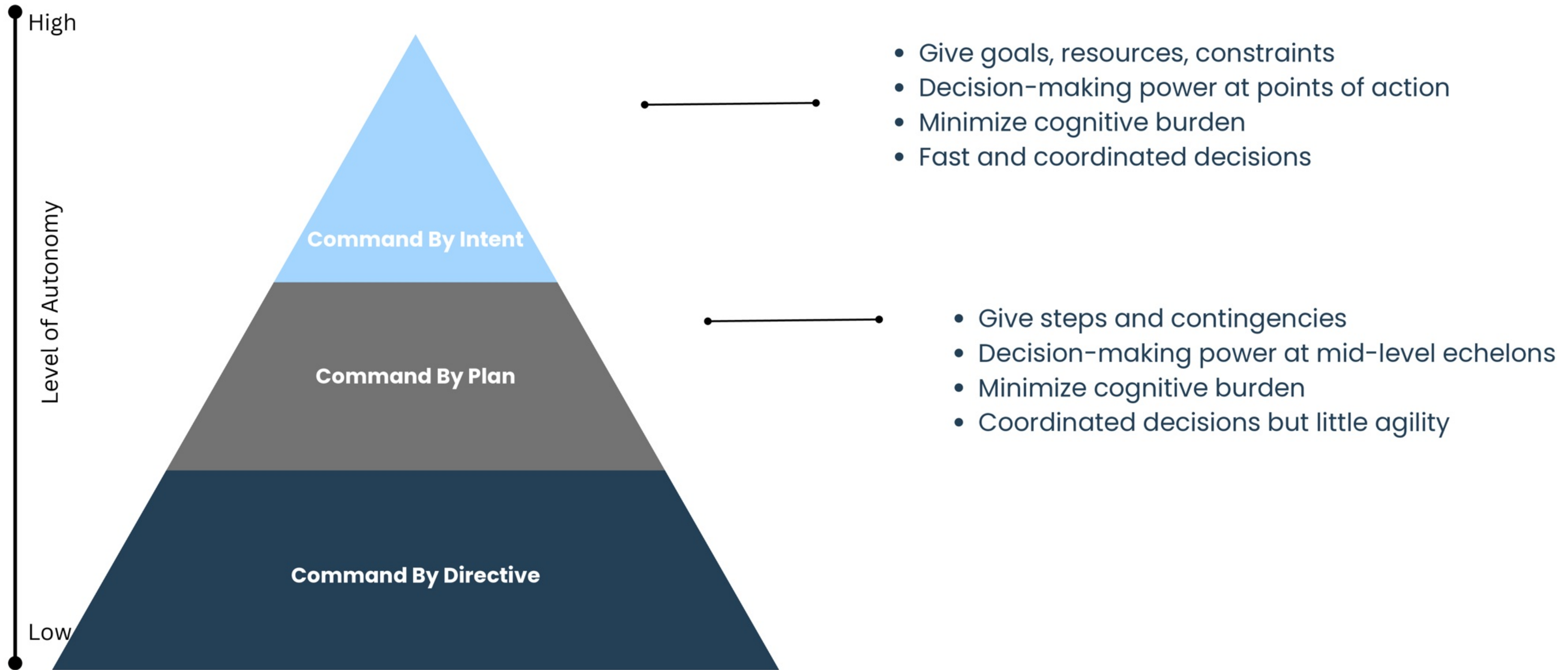
TOOL: COMMANDER'S INTENT



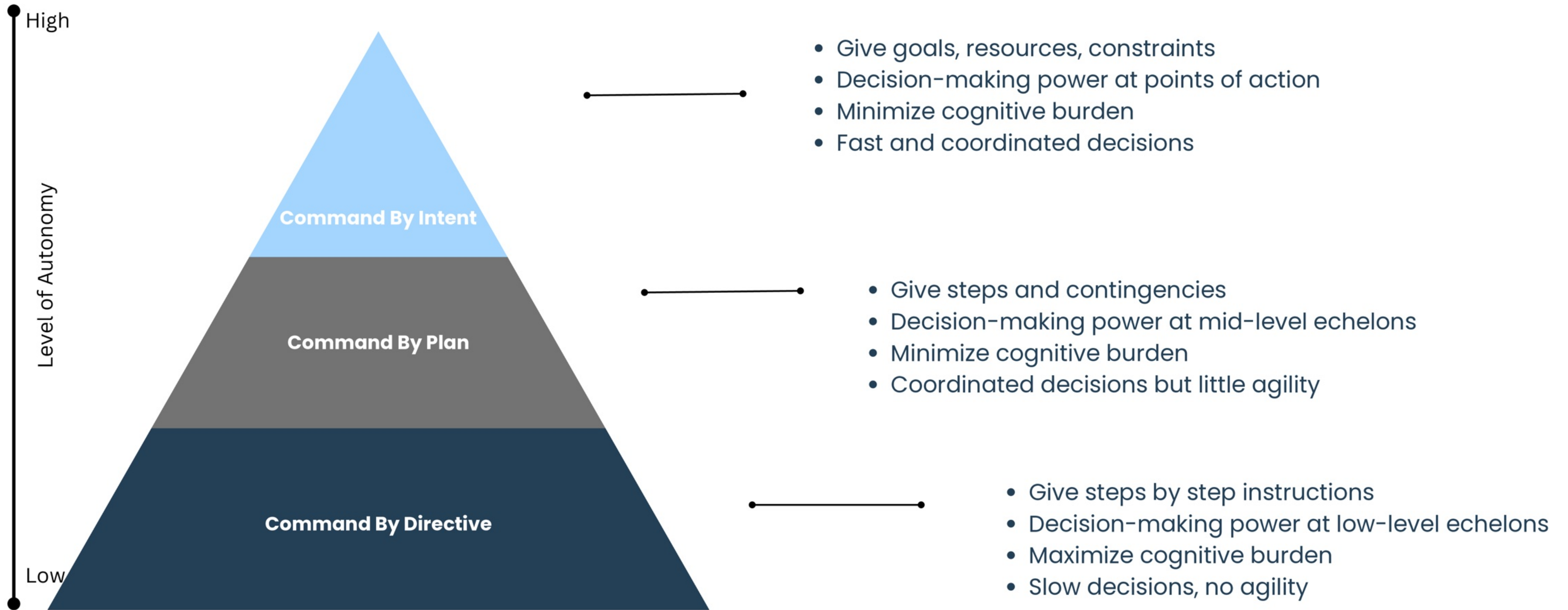
TOOL: COMMANDER'S INTENT



TOOL: COMMANDER'S INTENT



TOOL: COMMANDER'S INTENT



JOB DESCRIPTION EXAMPLE

GUEST EXPERIENCE & SEATING

- GREET AND WELCOME ALL GUESTS WITH WARMTH, ENTHUSIASM, AND KNOWLEDGE OF OUR BEER AND FOOD OFFERINGS.
- MANAGE THE WAITLIST AND SEATING ROTATION TO ENSURE EFFICIENT TABLE FLOW.
- PROVIDE MENUS, INTRODUCE DAILY FEATURES, AND COMMUNICATE WITH SERVERS ABOUT GUEST PREFERENCES OR NEEDS.
- MAINTAIN A CLEAN AND ORGANIZED ENTRY, WAITING, AND RETAIL AREA.

PHONES & TO-GO ORDERS

- ANSWER INCOMING CALLS PROMPTLY AND PROFESSIONALLY, PROVIDING ACCURATE INFORMATION ABOUT HOURS, MENUS, AND EVENTS.
- TAKE TO-GO FOOD AND BEER ORDERS OVER THE PHONE OR IN PERSON, ENSURING ACCURACY AND TIMELY COORDINATION WITH THE KITCHEN AND BAR.
- PROCESS PAYMENTS AND PREPARE ORDERS FOR PICKUP WITH PROPER PACKAGING AND LABELING.

RETAIL & DISPLAYS

- MAINTAIN AND MERCHANDISE BREWERY DISPLAYS, ENSURING PRODUCT SHELVES AND BEER COOLERS ARE STOCKED, ORGANIZED, AND VISUALLY APPEALING.
- TRACK INVENTORY LEVELS OF MERCHANDISE, PACKAGED BEER, AND PROMOTIONAL MATERIALS.
- ASSIST GUESTS WITH RETAIL PURCHASES, OFFERING PRODUCT INFORMATION AND RECOMMENDATIONS.

ADMINISTRATIVE & TEAM SUPPORT

- SUPPORT DAILY OPENING AND CLOSING PROCEDURES FOR THE TAPROOM.
- HELP MANAGE RESERVATIONS OR PRIVATE EVENTS AS NEEDED.
- COMMUNICATE GUEST FEEDBACK AND OPERATIONAL ISSUES TO MANAGEMENT.
- UPHOLD COMPANY STANDARDS FOR CLEANLINESS, SAFETY, AND SERVICE.

JOB DESCRIPTION EXAMPLE (AFTER)

MISSION:

ENSURE AN EXCEPTIONAL FIRST IMPRESSION AND EXPERIENCE FOR CUSTOMERS

AREA OF RESPONSIBILITIES:

- **PHONES**
- **GUEST ENTRY AND SEATING**
- **FRONT ENTRY**

KPI'S

- **CUSTOMER SATISFACTION SCORES**
- **TAKEOUT ORDER ERROR RATE**
- **SEATING ROTATION AND ADHERENCE TO OCCUPANCY RESTRICTIONS**
- **TABLE TURNOVER**
- **TAKEOUT AND RETAIL TRANSACTION TIMELINESS**

***3-5 KPI'S AND RESPONSIBILITIES**

**** KPI SHOULD HAVE "HARD" AND "SOFT" METRICS**



”



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

– BOB IGER



A ROAD MAP FOR YOUR BUSINESS

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

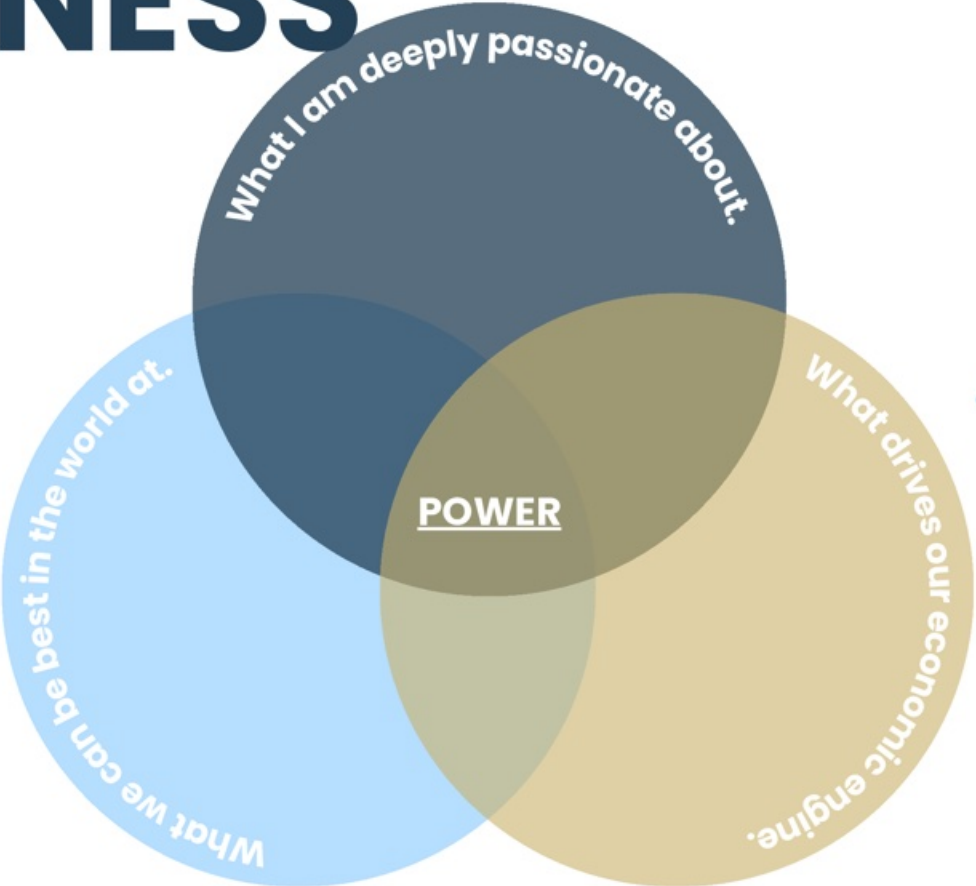
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

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

3-YEAR DIRECTION

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

1-YEAR FOCUS

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

QUARTERLY OBJECTIVES

QUARTERLY
OBJECTIVES

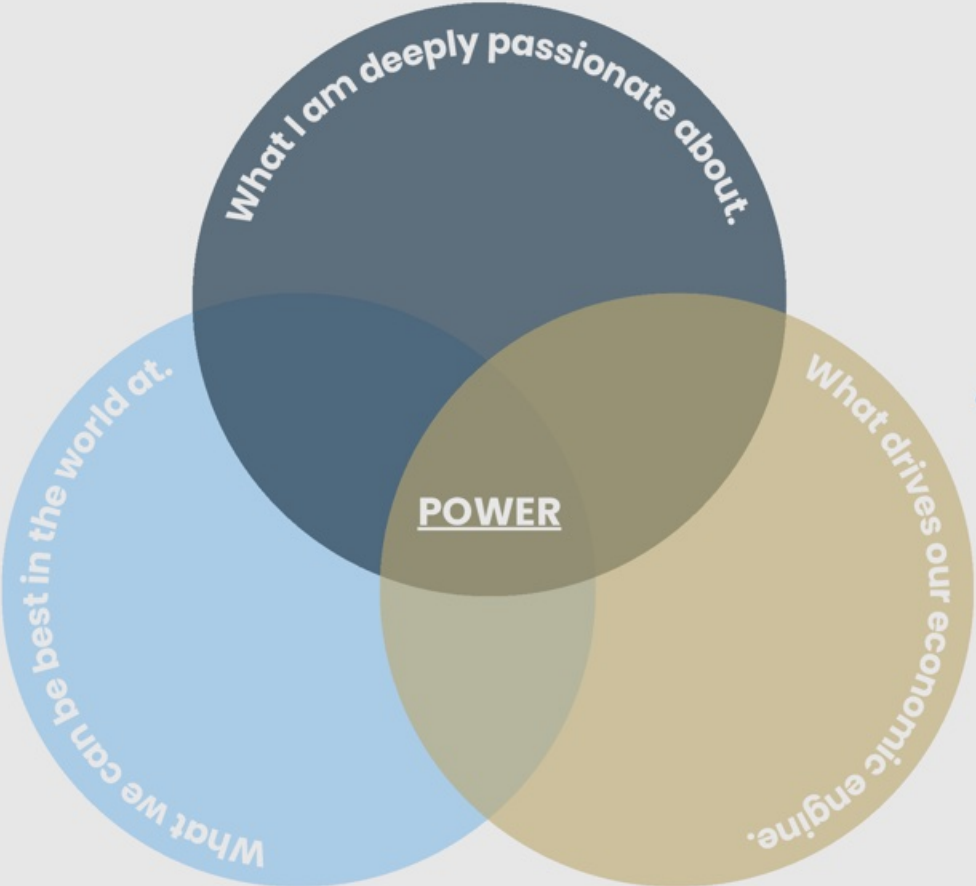
S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____



HEDGEHOG

CULTURAL
ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

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1-YEAR FOCUS

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QUARTERLY OBJECTIVES

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R: _____
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EE: _____

BETS

QUARTERLY
OBJECTIVES

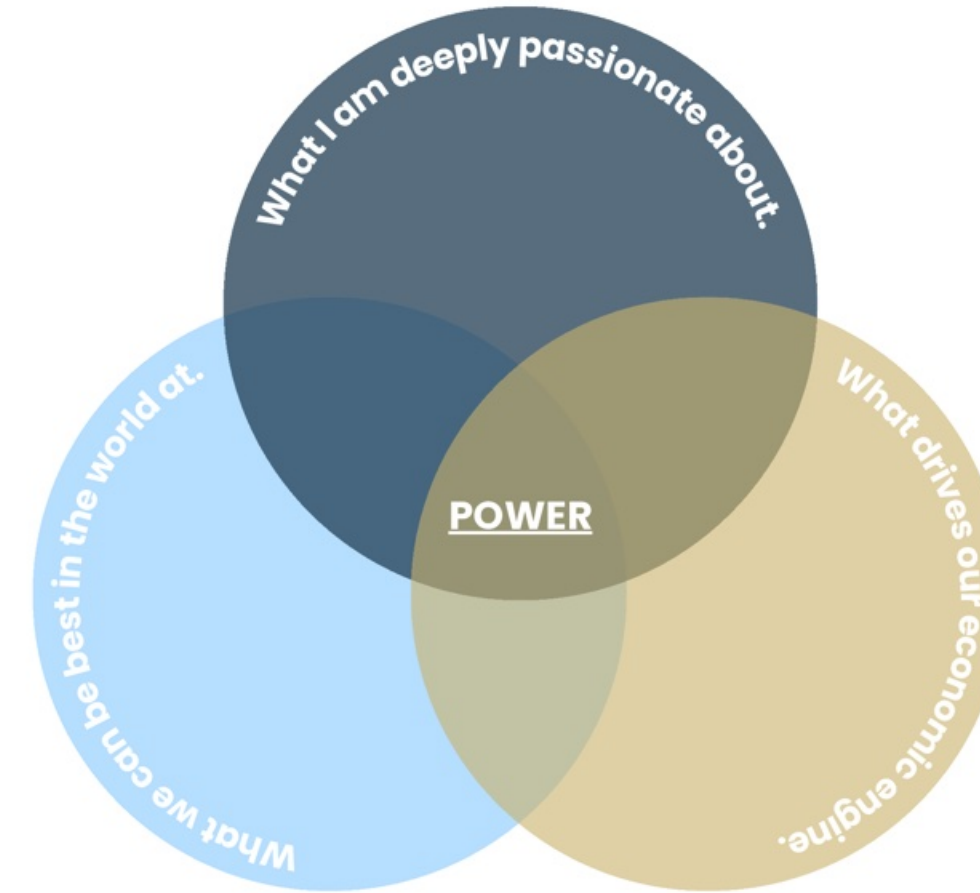
S2 ROAD MAP

ONLINESS
STATEMENT

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We are going _____
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HEDGEHOG

CULTURAL
ENGINEERING

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CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

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QUARTERLY
OBJECTIVES

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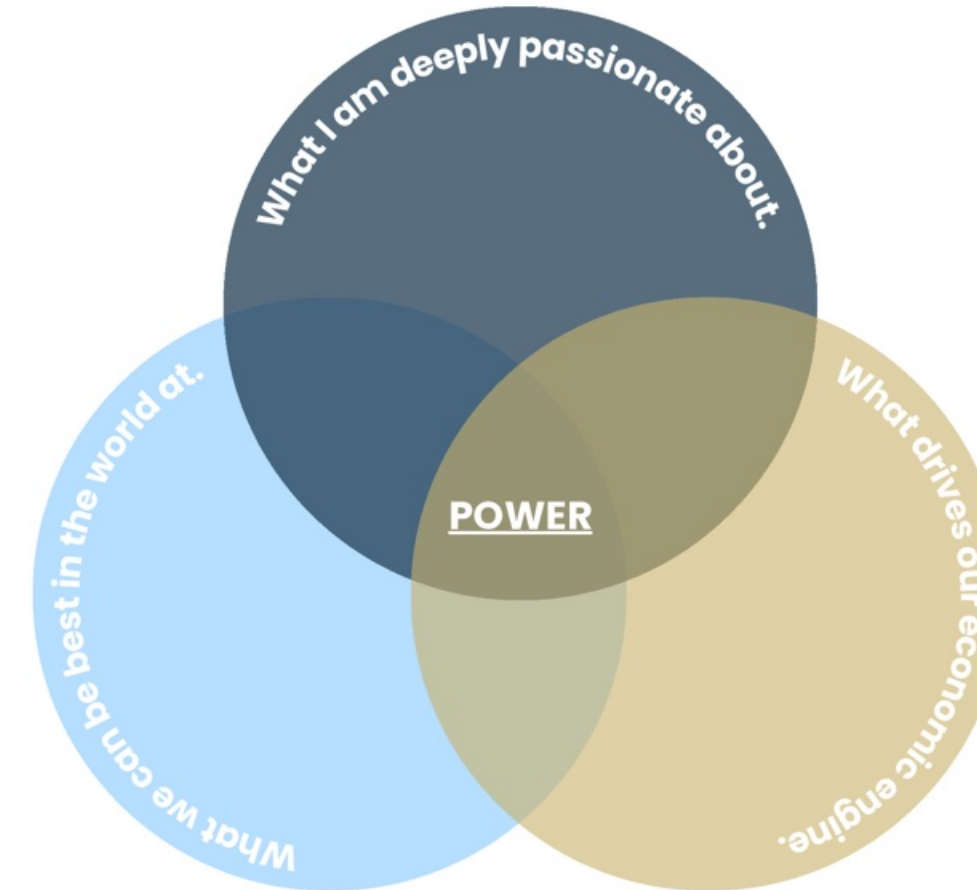
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

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

QUARTERLY
OBJECTIVES

MEANING: DESTINATION STATEMENT





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

–70% OF GEN Z





”

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





”

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



–ANDREW CARNEIGE

HOW'S THIS FOR A DESTINATION/VISION

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

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

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

OR THIS ONE

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

ATTRIBUTES OF A GREAT DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

03



ATTRIBUTES OF A GREAT DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

DOMINATES OR TRANSFORMS THE
WORLD

03



ATTRIBUTES OF A GREAT DESTINATION

01

SIMPLE, CONCISE, VISUAL

02

DOMINATES OR TRANSFORMS THE
WORLD

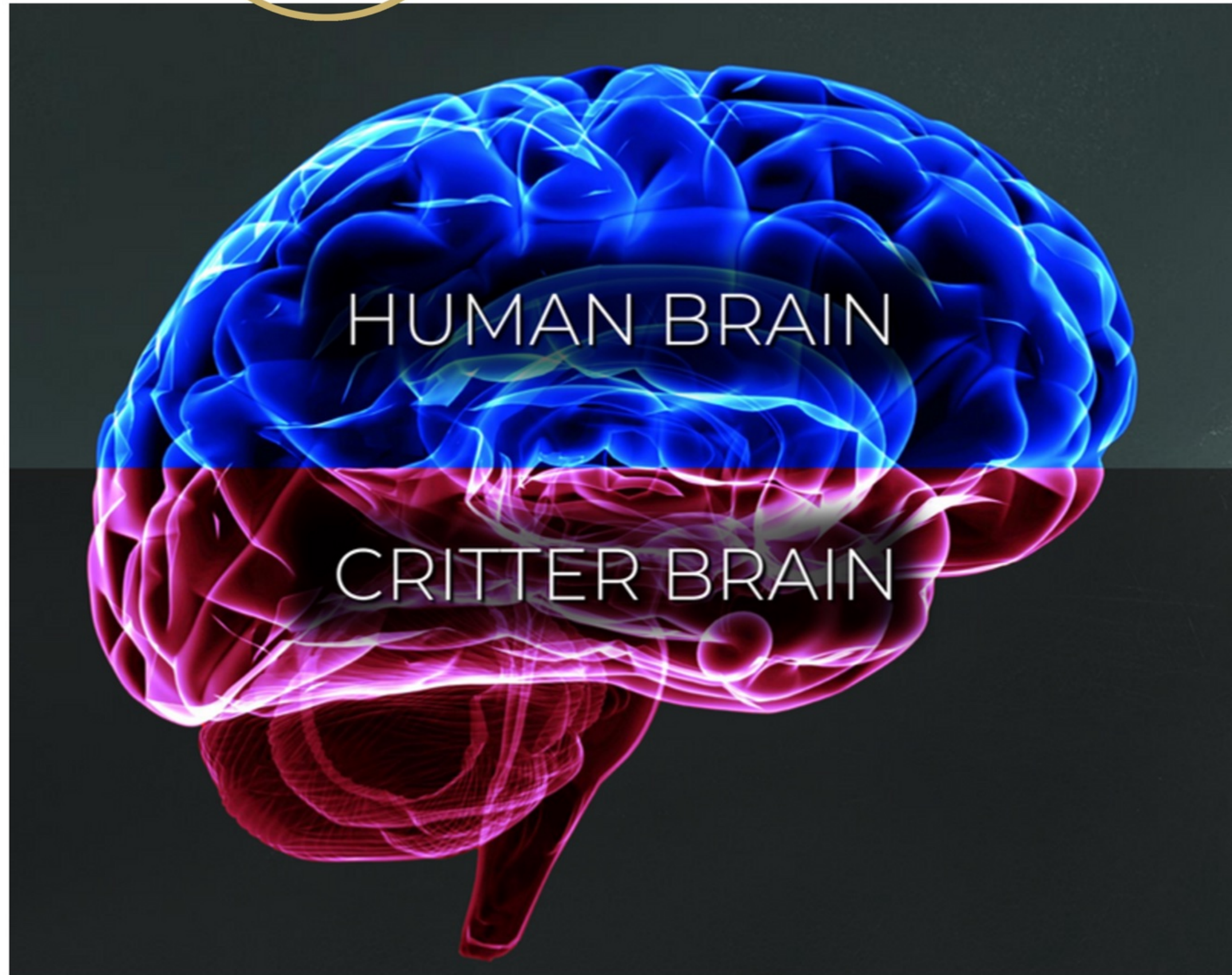
03

INSPIRES SOUL OF EVERY EMPLOYEE AND
CUSTOMER



”

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



HOW'S THIS FOR A VISION?

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We are going become indispensable to 6,000 customers

by 2030

because our customers are the foundations of
growth for our communities



REMEMBER THIS?

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

by 2029

because Breakfast can make or break your day





We are going to transform 10,000 lawns

by 2030

because outdoor spaces are where people
connect





We are going to transform 1000 organizations

by BY 2035

because businesses and non profits change our world





GREAT “BECAUSE” STATEMENTS

“The health of a society depends upon producing quality individuals” *- K-8 school*

“Great Leaders build Great buildings, connections, people, and each other.” *- Low Voltage Company*



“We believe everyone deserves a clean safe affordable place to live” *- Private equity developer and operator of workforce housing*



MAP YOUR DESTINATION

We are going Where?

by When?

because Why?





”

5 YEARS FROM NOW:
WHAT'S THE WIN FOR
YOUR BUSINESS?
WHY IS THE IMPACT TO
HUMANITY?

DESTINATION HUDDLE



5m

Work alone on worksheet

10m

Large group sharing

S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

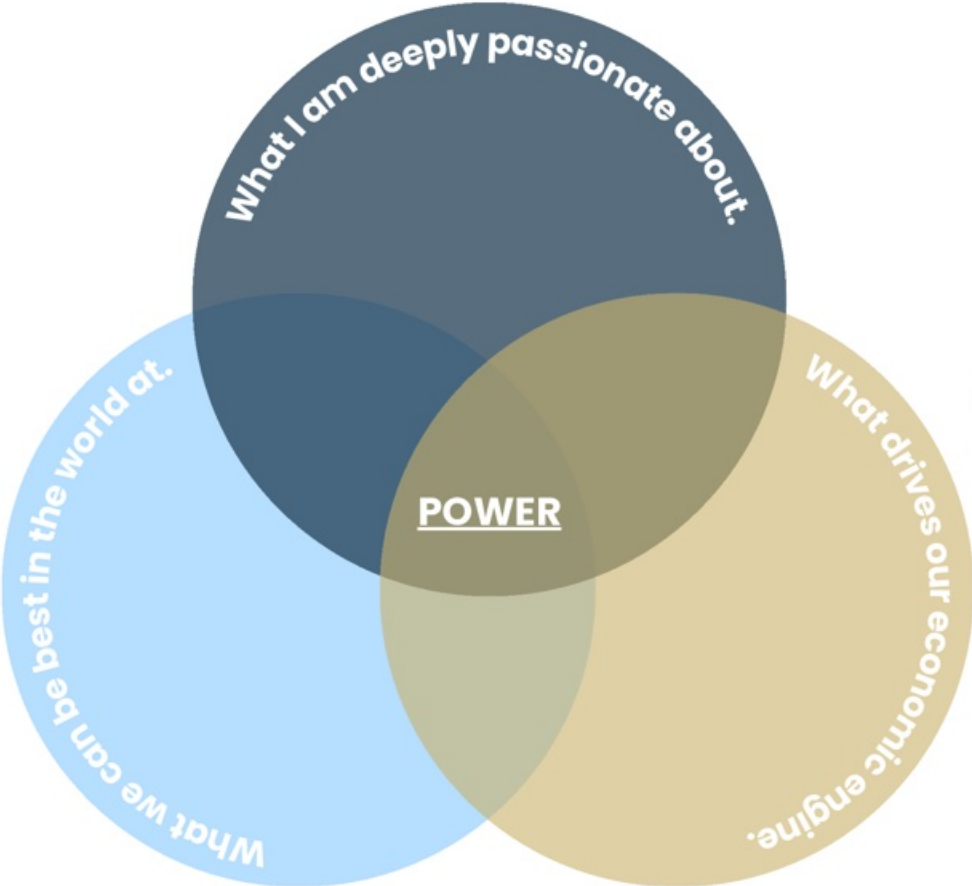
VALUES



ORG HABITS



CULTURE



HEDGEHOG

BETS

Date: _____
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3-YEAR DIRECTION

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1-YEAR FOCUS

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QUARTERLY OBJECTIVES

QUARTERLY
OBJECTIVES



BELONGING: IDENTITY STATEMENT



Matt Damon Forces His Way onto Kimmel in Brooklyn & Trump's Big Beautiful Shutdown...



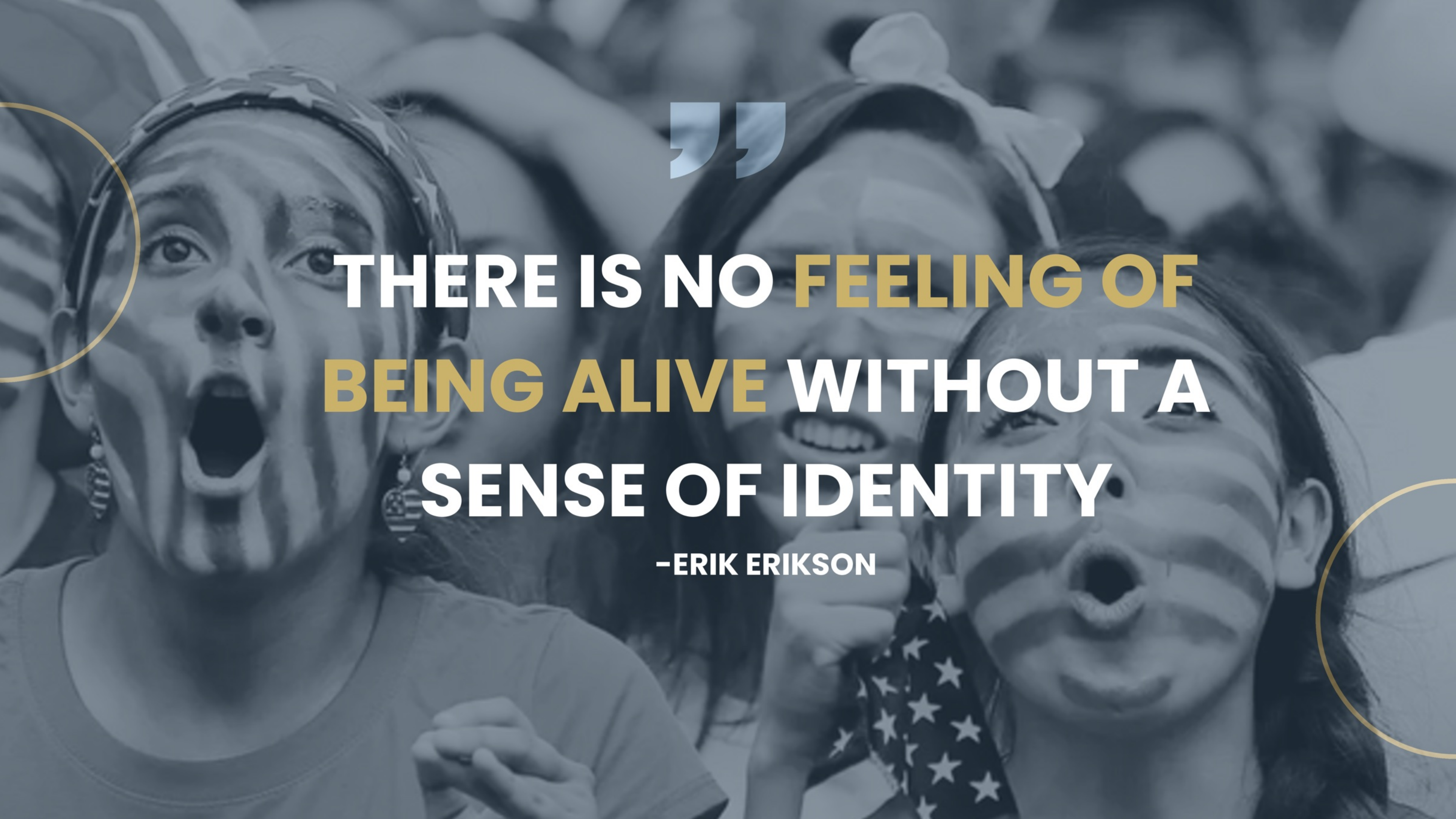
Copy link



JIMMY
Kimmel
LIVE!

DUNKIN' DUMBASS!

Watch on  YouTube



”

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

—ERIK ERIKSON

ONLINESS STATEMENT

What sandbox do you play in?

We are the only _____
that _____

ONLINESS STATEMENT

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

ONLINESS STATEMENT

We are the only airline

that makes flying affordable for
people who live in trailers



”

**“RICHERS ARE IN THE
NICHES**

-PAT FLYNN

ATTRIBUTES OF A GREAT ONLINESS STATEMENT

01

SIMPLE, CONCISE, CLEAR

02

COMMUNICIATES WHO YOU SERVE (AND
DON'T)

03

UNIQUE TO YOU



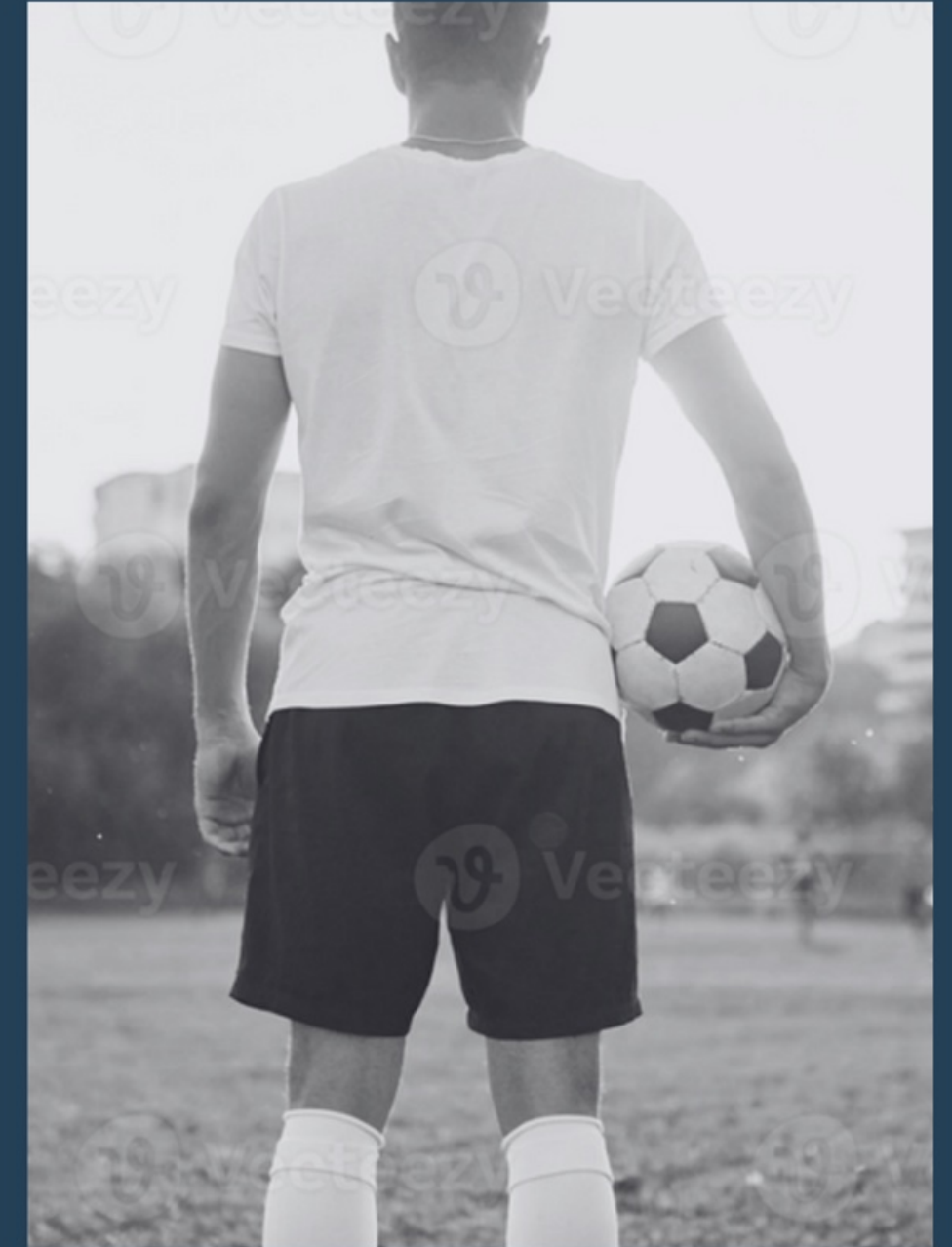
ONLINESS STATEMENT

Who are our top 2-3 competitors?

Why do your customers hire you over them?



Key Differentiator



ONLINESS HUDDLE



5m

Work alone on worksheet

10m

Large group sharing

S2 ROAD MAP

ONLINESS STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

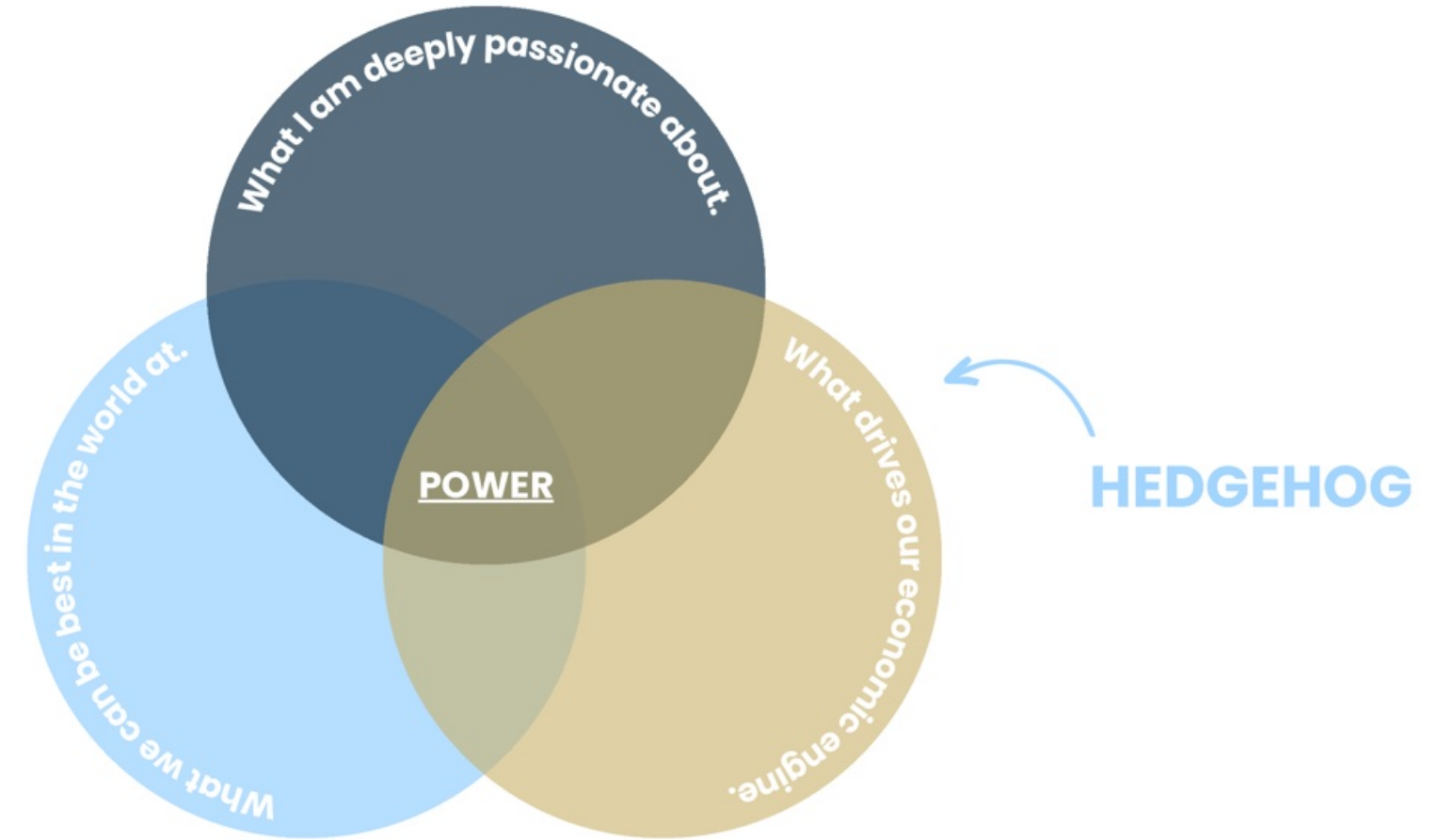
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QUARTERLY OBJECTIVES



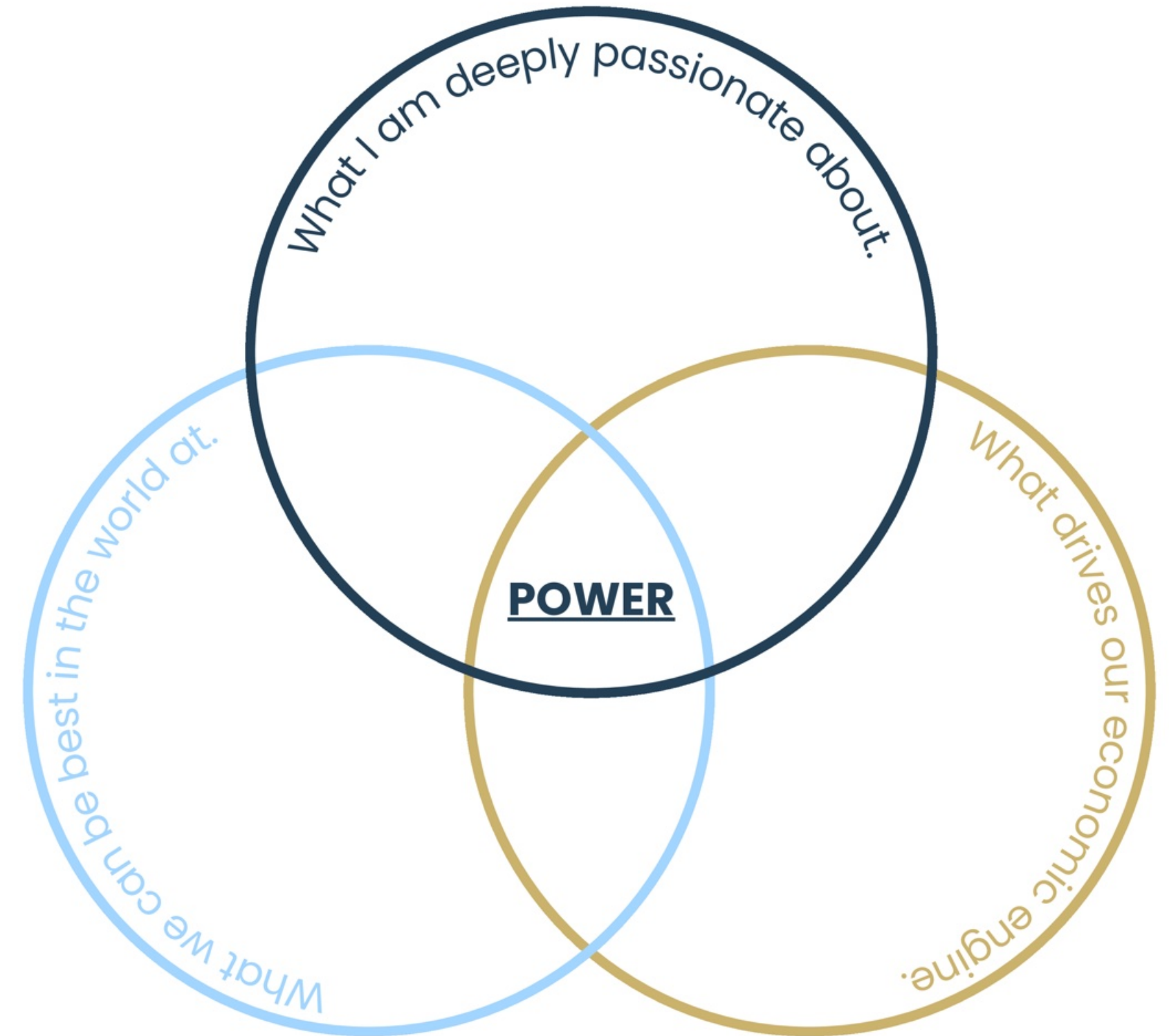
A close-up, low-angle shot of a hedgehog in a field of tall grass. The hedgehog is looking upwards and to the left, with its long spines clearly visible. The background is a soft-focus field of grass. The overall tone is muted, with a blueish-grey tint.

BECOMING: **HEDGEHOG**

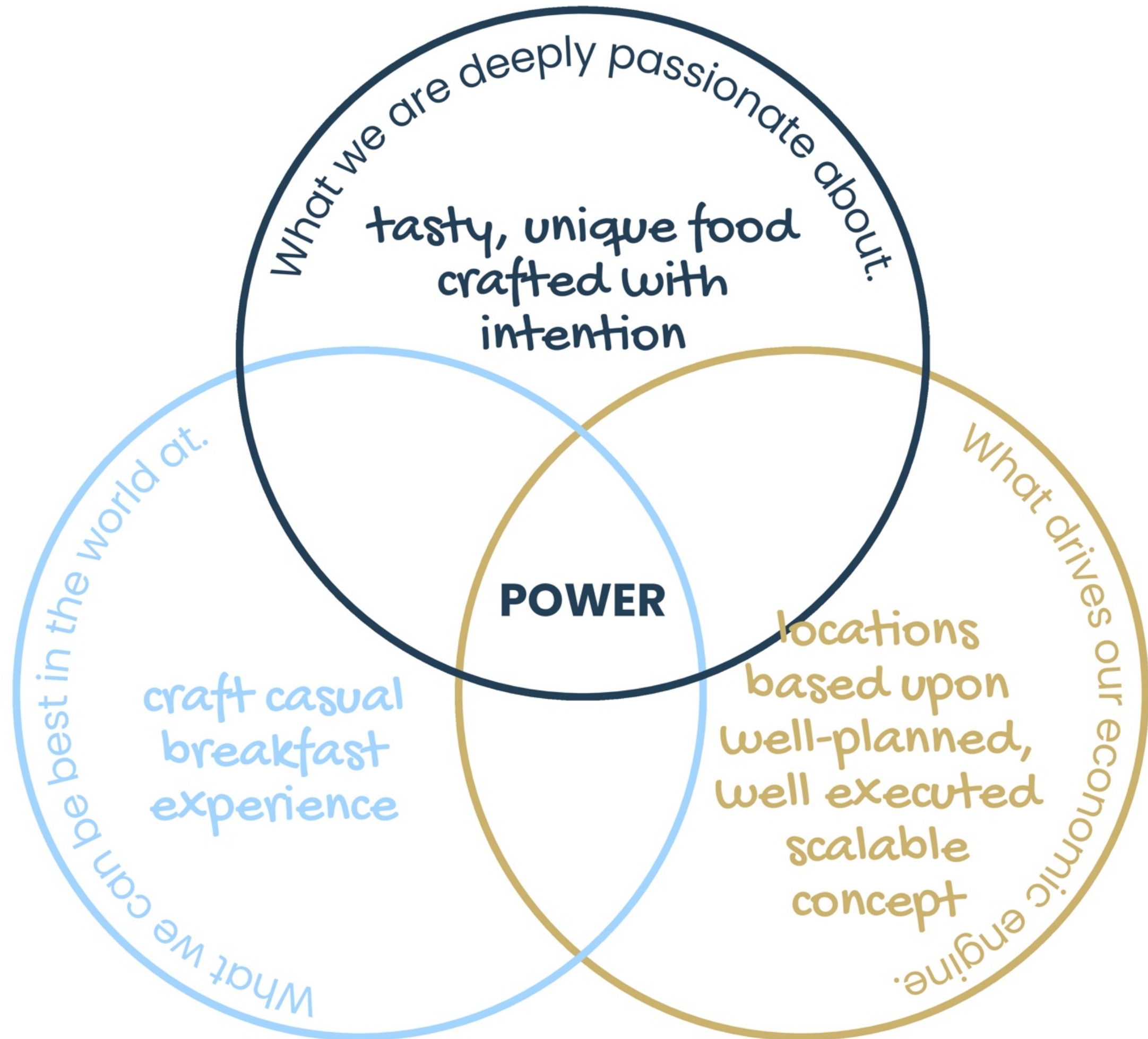
HEDGEHOG

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

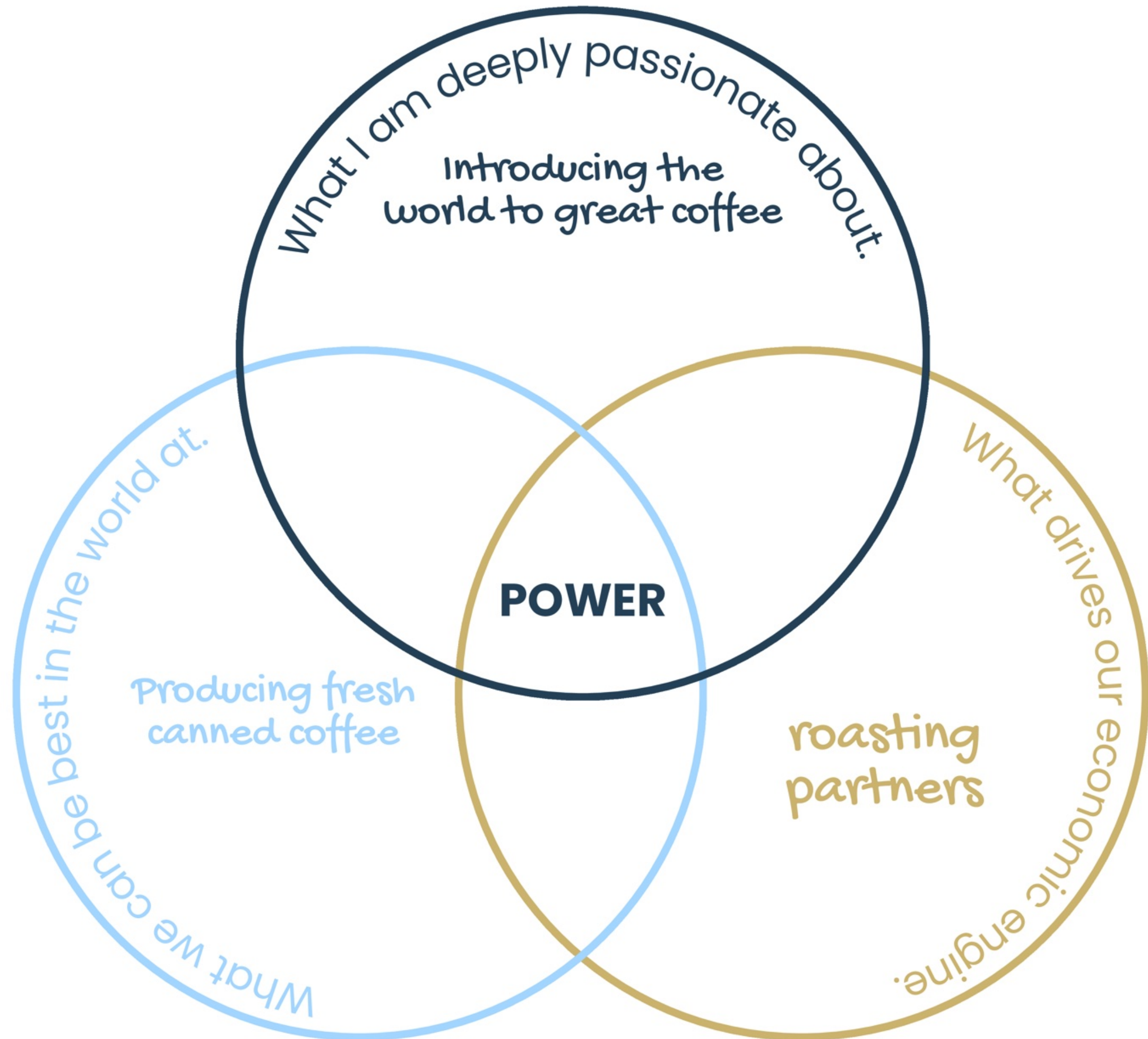
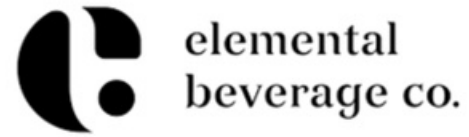
- What can we be the best in the world at?
- What are we deeply passionate about?
- What drives our economic engine?



HEDGEHOG FOR BREAKFAST SHOP



HEDGEHOG FOR



HEDGEHOG HUDDLE



10m

Brainstorm some ideas for your hedgehog

10m

Large group sharing

HEDGEHOG STATEMENT

Passion: What gets you up in the morning?

What can you do better than anyone else

Where do you invest to drive the greatest growth?



Your Hedgehog



S2 ROAD MAP

ONLINESS
STATEMENT

We are the only _____
that _____

DESTINATION

We are going _____
by _____
because _____

CULTURAL
ENGINEERING

VALUES



ORG HABITS



CULTURE

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

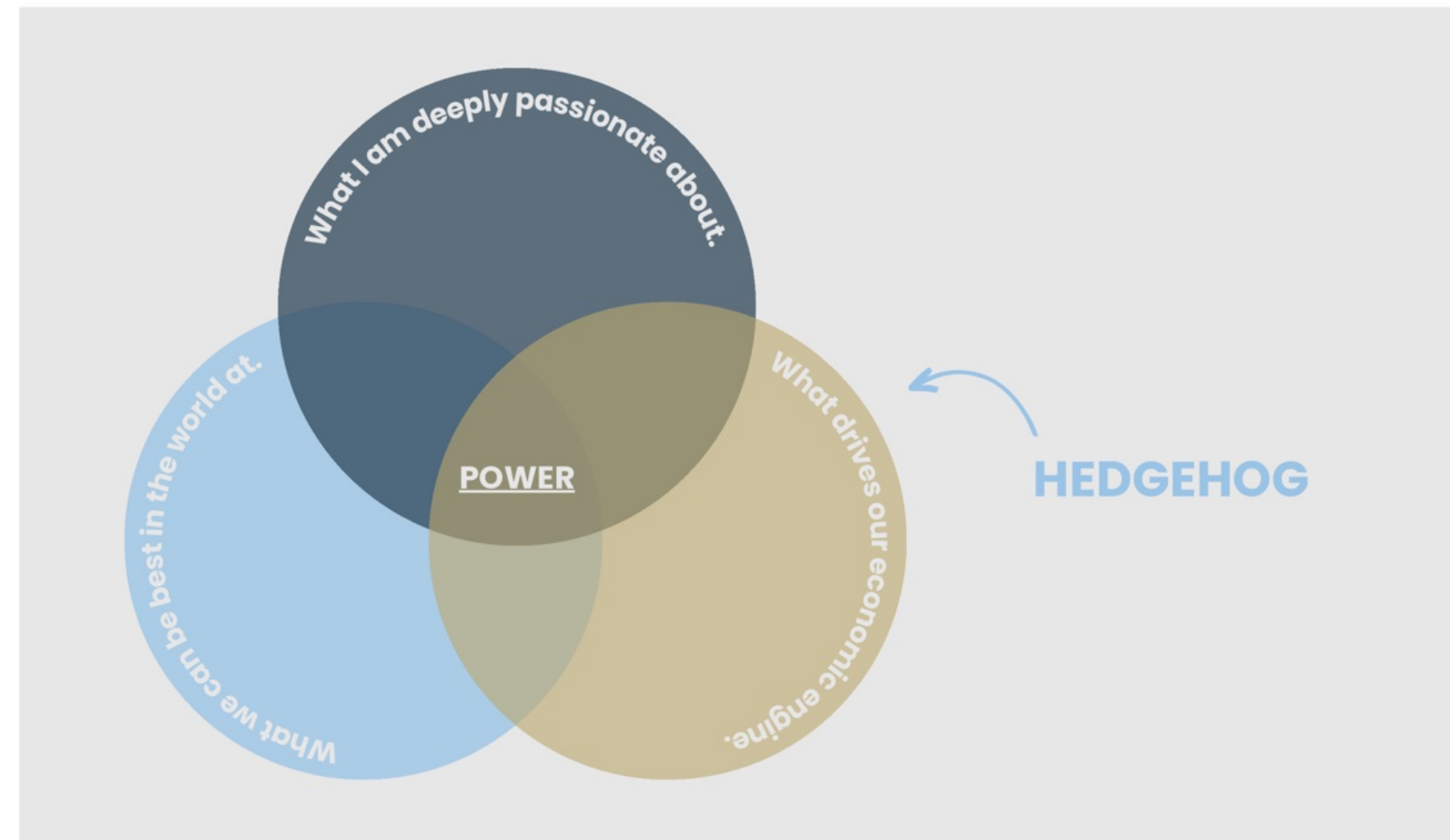
BETS

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EE: _____

QUARTERLY
OBJECTIVES





LOVE



**THE ONLY WAY TO DO
GREAT WORK IS TO LOVE
WHAT YOU DO**

-STEVE JOBS



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

THREE EASY WAYS TO MAKE EMPLOYEES FEEL LOVED

15 MINUTES A WEEK – 3 QUESTIONS

- **HOW ARE YOU GOING?**
- **WHAT ARE YOU WORKING ON?**
- **HOW CAN I HELP**

20% OF THEIR TIME ON WHAT THEY LOVE

QUARTERLY PERSONAL ROADMAP

Name

's Personal Road Map



Mission

I bring
in order to

Hedgehog

My Craft

My Passion

My Unique Genius

Growth

Personal

Professional

Current Focus

My Contribution

VALUES

	1	2	3	4
	1	2	3	4
	1	2	3	4
	1	2	3	4

F.I.T.

V/N V/N V/N

KPIs

Target

Trend

ENGAGEMENT INDEX

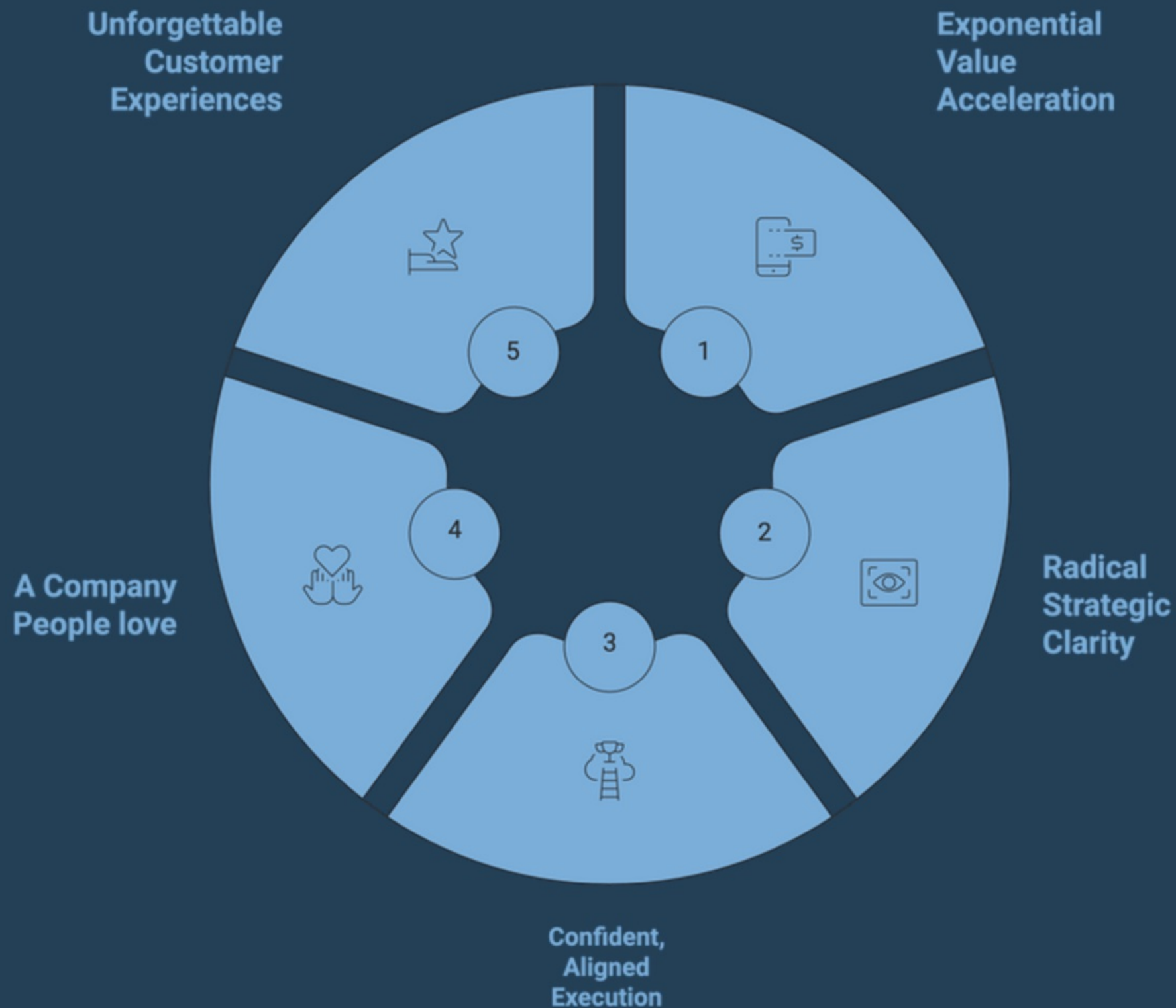
Purpose	1	2	3	4
Growth	1	2	3	4
Flexibility	1	2	3	4
Recognition	1	2	3	4
Reward	1	2	3	4
Autonomy	1	2	3	4
Relationships	1	2	3	4

Notes



What's Next?

UNLOCK THE BEST VERSION OF YOUR COMPANY



COMPLIMENTARY

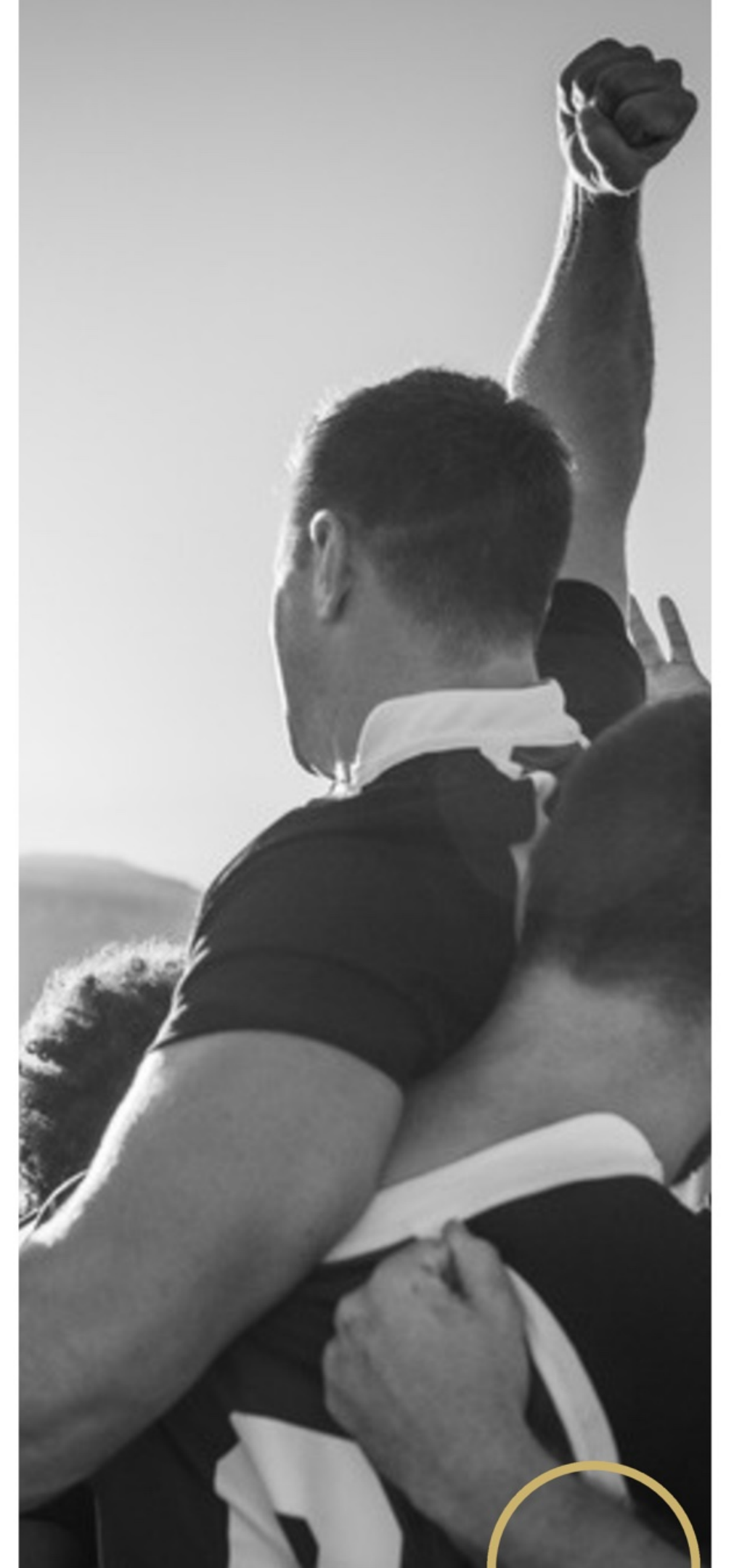
- COACHING SESSION
- STRATEGY SPRINT WORKSHOP
- WHAT'S THE VALUE OF YOUR GREATEST ASSET?
- PERSONAL ROADMAP



WHAT WAS YOUR A-HA
MOMENT TODAY?



WHAT ONE
COMMITMENT ARE
YOU GOING TO TAKE
TODAY?



LET'S CONNECT



JON CHEN

**ELIMINATE CHAOS AND UNLEASH THE BEST VERSION OF
YORU COMPANY**



SCAN

FOR TODAY'S RESOURCES AND
TO CONNECT ON LINKED IN

JON@BLUETIDECATALYSTS.COM

781-325-3152

VISTAGE SPEAKER FEEDBACK

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

