

THE ASCENT FELLOWSHIP FOR FAMILY-RUN AND FOUNDER-LED BUSINESSES

NOVEMBER 2018 – MAY 2019



WE BELIEVE IN THE POWER OF THE NETWORKS AND COMMUNITY TO DRIVE INDIVIDUAL AND ORGANIZATIONAL SUCCESS.

ABOUT ASCENT

Ascent creates best-in-class peer and expert networks to deliver transformative, immersive, and tailored experiences, giving leaders unique access to the people and ideas shaping the future.

As a result, senior executive leaders in our programs learn how to think differently and adapt to changing contexts.

We carefully curate each experience, offering top executives the opportunity to engage in programs truly customized to their needs.

Ascent's tailored offerings combine world-class faculty, peers, mentors, and venues to provide hands-on learning and exposure to the ideas revolutionizing industry and society.

"I INVESTED IN ASCENT BECAUSE THEY DELIVER THE KIND OF BESPOKE PROGRAM I WISH I HAD ACCESS TO WHEN I WAS CEO."

– Jim McCann, Founder of 1-800-Flowers.com, Chairman of Willis Towers Watson

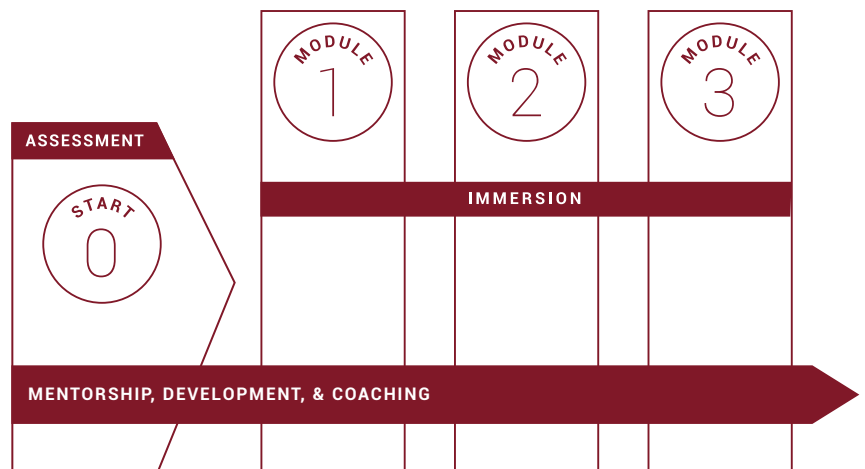
Our meaningful programs and interactions that take already-successful leaders even higher.

ASCENT FELLOWSHIPS: AN OVERVIEW

Ascent Fellowships are cohort-based programs tailor-made to fit the needs of each carefully selected group of executive peers. Fellowships comprise three residential modules across nine months, delivering a unique combination of in-depth assessment, immersive experiences, and ongoing mentorship from best-in-class practitioners.

Each Fellowship program focuses on the most vital topics for the participants in that group, always delivering

- A network of trusted peers and mentors
- Investment in personal and organizational legacy planning
- Increased relevancy as a leader in today's context



Mentors provide guidance to Felows every step of the way. They are a dedicated resource for any questions and open dialogue during and between each module.



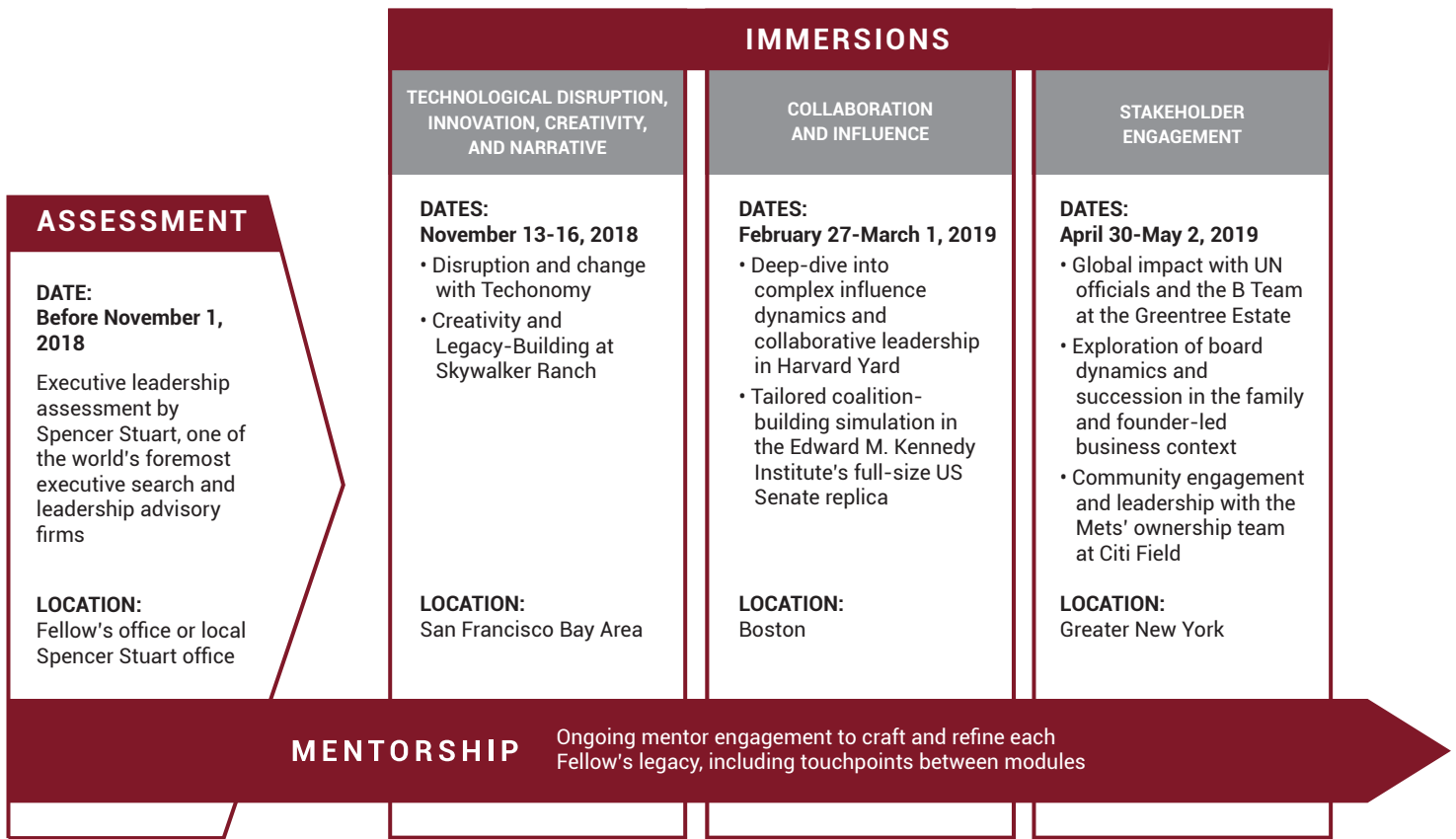
FAMILY-RUN AND FOUNDER-LED FELLOWSHIP PROGRAM DETAILS

Our research shows that there are particular needs that arise for leaders of family-run and founder-led businesses:

- More awareness of the surrounding context, such as new trends and external factors driving transformation
- Increased familiarity and comfort with collaborating and influencing
- Help addressing unique challenges around board dynamics and executive succession
- Deep desire to leave a lasting and impactful legacy

We have crafted our program to specifically address these potential blind spots and opportunities.

PROGRAM AT A GLANCE



Through the program, Fellows receive

- A robust network of trusted peers, mentors and confidants
- An in-depth personal assessment and development plan for the legacy they want to leave behind
- Deeper exposure to and understanding of the technology trends and forces likely to disrupt their industries and businesses
- New skills for communicating and implementing their vision and legacy
- Insight into how to collaborate across complex stakeholder groups and develop coalitions for impact



ASSESSMENT

1/2 DAY

FELLOW'S OFFICE OR LOCAL SPENCER STUART OFFICE



The Fellowship begins with building self-awareness. Each Fellow spends a half day with an expert assessor from Spencer Stuart on a set of comprehensive assessments and discussions to create a nuanced understanding of the Fellow's history as a leader, interpersonal style, current and potential capacity, as well as their leadership context. Fellows then meet with their assessor to discuss the results of this deep analysis and to craft a personal development plan.

HIGHLIGHTS

- **A comprehensive approach**, using a range of methods from online evaluations to in-person behavioral interview and case studies, designed to create a holistic understanding of the individual. 360 interviews with colleagues fill in gaps and add nuance
- **Executive Intelligence (ExI) evaluation**, providing an in-depth interview, looking at the skills, knowledge, and expanded leadership characteristics, including: critical and conceptual thinking; interpersonal and social awareness, and self-evaluation and adjustment to circumstance
- **Culture Alignment Framework**, studying character and interpersonal style to understand values, drives, leadership style, and alignment with organizational cultures
- **Leadership Capability Assessment**, offering insights through six key capabilities critical to leadership performance, benchmarked against leaders worldwide: strategic thinking, leading change, leading people, driving results, collaborating and influencing, and building people capacity
- **One-on-one debrief**, using the assessment's results to plan the growth that matters most

KEY PARTNERS

SPENCER STUART

Spencer Stuart is a global company dedicated to providing the insight to help organizations and leaders make informed decisions about the leadership needed to build an organization that outperforms, inspires, and grows.

A leader in the field of executive assessment, Spencer Stuart's proprietary assessment tools will give Ascent Fellows the depth of knowledge that is needed to fuel their flight.

www.spencerstuart.com



IMMERSION 1

TECHNOLOGICAL DISRUPTION, INNOVATION, CREATIVITY & NARRATIVE

NOVEMBER 13-16, 2018

CALIFORNIA: HALF MOON BAY & SKYWALKER RANCH



The first immersion begins by studying the factors driving technological change so Fellows develop a deeper understanding of current and future contexts. The people at the forefront of transformation will be part of the conversations. From there, we build on the disruption theme to focus on what each Fellow wants to create: their legacy and impact.

HIGHLIGHTS

- **Disruption and change** at Techonomy at the Ritz Carlton, Half Moon Bay: enter a highly creative, energizing space and engage in in-depth thinking that will challenge Fellows to reconsider previous concepts and discover the newest disruptors and trends
- **Creativity, narrative, and legacy-building** at Skywalker Ranch: Fellows develop and map long-term goals for their personal and professional legacy, and learn narrative storytelling so they can effectively communicate their legacy.

KEY PARTNERS

TECHONOMY

Techonomy designs events that put the change-making leaders and thinkers on stage, and pushes them to go further, so business and social leaders can gain deeper understanding. It's where leaders come to explore how tech changes everything.

The Ascent program will leverage Techonomy's experts to deep-dive into current trends. Ascent Fellows can also choose to attend the full Techonomy 2018 conference from November 11-13.

www.techonomy.com

SKYWALKER RANCH

Skywalker Ranch houses some of the most innovative thinkers in the entertainment industry. Ascent's Fellows will be only the second group to ever take up residence in the Summit at Skywalker Ranch. Skywalker Ranch is located in Marin County, California.

<http://lucasfilm.com/skywalker-ranch-marin>



IMMERSION 2

COLLABORATION & INFLUENCE

FEBRUARY 27-MARCH 1, 2019

MASSACHUSETTS: HARVARD YARD & EDWARD M. KENNEDY INSTITUTE



The second immersion focuses on the tools and skills needed to persuade, collaborate, and influence. Fellows will engage in tailored simulations and exercises to bring concepts to life. We will balance the cutting edge with the living history of the Loeb House, home to Harvard's past presidents and governing boards, and the Edward M. Kennedy Institute.

HIGHLIGHTS

- **Coalition-building and negotiation at Loeb House in Harvard Yard:** explore various methods of negotiation and influence with experts from Harvard and business leaders
- **Collaboration and coalitions at the Edward M. Kennedy Institute:** explore what collaborative leadership really looks like via simulations in the Institute's full-size replica of the U.S. Senate chamber
- **Legacy-building at the dinner table:** engage in a deeply thoughtful and challenging "family dinner" with unique guests, inspired by the Kennedy family's tradition of bringing the crucial questions of the day to the dining table

KEY PARTNERS

EDWARD M. KENNEDY INSTITUTE

Dedicated to educating and encouraging participatory democracy, invigorating civil discourse, and inspiring the next generation of citizens and leaders, the Institute is a tribute to the Kennedy family's storied engagement with public service.

www.emkinstitute.org



IMMERSION 3

STAKEHOLDER ENGAGEMENT

APRIL 30-MAY 2, 2019

NEW YORK: GREENTREE FOUNDATION & CITI FIELD



Building on the coalition-building and negotiation skills from module two, the focus of module three shifts to public and private stakeholder engagement and societal impact. Here, we examine boards, governments, investors, employees, and customers, putting Fellows in situations that highlight the importance of global and local engagement.

HIGHLIGHTS

- **Stakeholder engagement and social impact** at the UN's Greentree Foundation Estate in Manhasset, Long Island. Dive into
 - Multi-sector engagement and impact with select **UN officials**
 - The relationship between organizations and social impact with the **B Team**
- A deep exploration of **board dynamics** and executive **succession** with leading experts, to address the elements uniquely challenging to family-run and founder-led businesses
- **Complex stakeholder engagements** at Citi Field: partner with the Mets ownership team to learn how family and founder-led businesses overcome enormous obstacles

KEY PARTNERS

THE B TEAM

The B Team is a not-for profit initiative comprising global business leaders working to catalyze their peers as a movement and driving force for the sustainable, inclusive wellbeing of people and the planet.

www.bteam.org

NEW YORK METS

Based in Queens, New York, the New York Mets team was founded in 1962. Still family-led, the New York Mets recently built and moved into the team's new home, Citi Field. The Mets supports the New York Mets Foundations, which funds charitable causes.

www.mlb.com/mets



MENTORSHIP FOR LEGACY-BUILDING



Mentorship underpins the entire Fellowship program, providing a red thread across all of the modules. Each Ascent Fellow is paired with a mentor who has deep experience addressing relevant organizational challenges. The mentorship focus for this Ascent Fellowship of family-run and founder-led business leaders is legacy-building, to ensure that Fellows understand and can deploy the tools required to build a lasting legacy.

In addition to mentor meetings and legacy instruction in the immersions, legacy work continues between immersions to deepen the work and give more time for reflection.

MENTORS INCLUDE

JIM MCCANN

Founder and Chairman of 1-800-FLOWERS; Chairman of Willis Towers Watson and Ascent Leadership Networks

JEAN-PIERRE ROSSO

Former CEO & Chairman, Case New Holland (CNH Global); Former Chairman, World Economic Forum USA

ROBERT SHERMAN

Former US Ambassador to Portugal; Former Co-Managing Director, Greenberg Traurig, Boston

SUSAN SOBBOTT

Former President of Global Commercial Services, American Express



TAKE FLIGHT WITH US

Ascent Fellows are top executives eager for a truly customized experience with world-class faculty, peers, mentors, and venues. Our nomination and selection process allows us to assemble a strong peer cohort of committed, thoughtful leaders, and design a program that best fits their needs.

The fee for this program is \$75,000, including assessment, lodging, meals, and materials.

THE ASCENT DIFFERENCE

We believe in the power of networks and community to drive individual and organizational success. We carefully curate each fellowship, offering top executives:

- Experiences in one-of-a-kind venues, instead of classrooms
- Immersive and engaging experiences, instead of one-way panels
- Curated cohorts and peer networks, instead of all-call, open enrollment
- Bespoke, tailored learning rooted in assessment, instead of mass produced courses
- Diverse, world-class faculty networks, instead of experts limited to one institution's faculty
- Respect for participants' time with focused, meaningful modules, instead of multiple weeks in residence

WHY ASCENT

Ascent was founded by three people with over 40 years of combined experience at the World Economic Forum and Spencer Stuart. Throughout their tenures there and elsewhere, they saw that there was no one-stop organization for in-depth leadership development and immersive event experiences. To address this need, they developed a methodology for leadership development that assembles the best of the best in order to engage learners in meaningful ways:

- Network-based learning from peers and mentors
- Immersive experiences
- Room for personal reflection and growth
- Diverse perspectives across sectors and professions

OUR LEADERSHIP TEAM



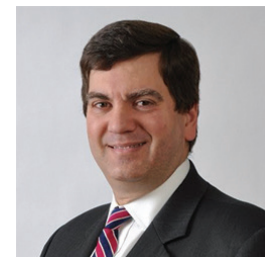
KEVIN STEINBERG
Founder & CEO



KATHERINE RANDEL
Co-Founder &
Managing Director



TIFFANY WEST
Co-Founder &
Managing Director



STEPHEN KELNER
Managing Director

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