

## A DIFFERENT KIND OF ANNUAL REPORT: GETTING REAL IN 2022 AND 2023

### OUR CLIENTS AND COLLEAGUES ARE DOING *GREAT THINGS*

Together, we continue to kick conventional business wisdom to the curb and transform how people work together as a result



### IN 2022 AND 2023, WE WERE WOWED BY YOUR TRIUMPHS

#### HELP

You trained your sites on helping your clients in whatever way was best for them (rather than convincing them to buy from you) and—no surprise—set new sales records in the process.

#### BE YOURSELF

You opted for authenticity and honesty over equivocation. And you let yourselves be known by others in meaningful and memorable ways.

#### KEEP IT REAL

You consistently chose courage over fear by making bold moves and offering distinctive points of view. And your clients took note.

(to name a few)

### WE AIMED TO DO OUR PART WITH SIMILAR COURAGE AND PASSION



**Mastery programs.** In the past two years, our delivery team led nearly 6,000 people through 100+ programs—still mostly virtual but we're seeing a slow return to in-person gatherings. One organization alone sponsored over 700 senior leaders to participate in our [signature Mastery program](#) and they've got kick-a\*\* results to show for their investment.

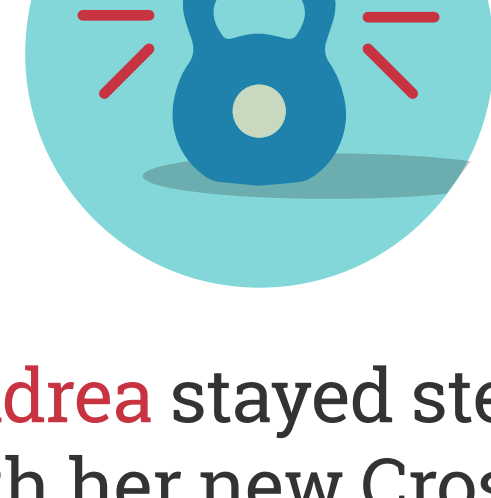


**Inclusive trusted advisorship.** We piloted a virtual program on inclusive trusted advisorship, and we'll test it out in person in early 2024.



**Thought leadership.** We rebooted our (now) Monthly-ish Tips and continue to celebrate having 300+ in our [archives](#).

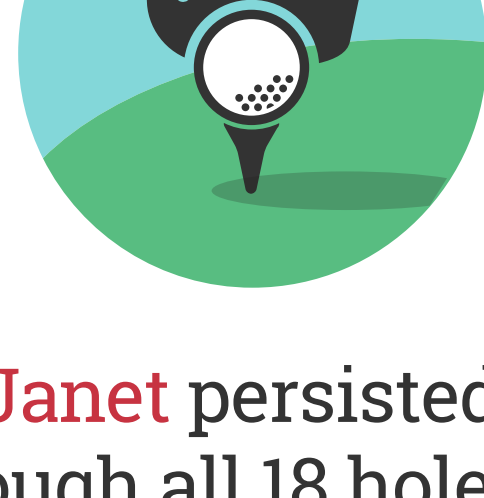
Oh—and let's not forget the **personal accomplishments** for a few of our team members



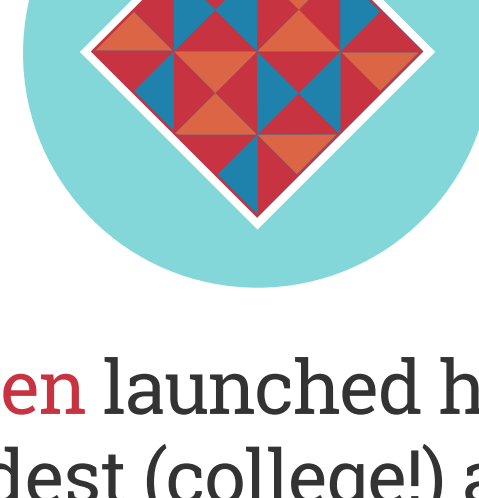
**Andrea** stayed steady with her new CrossFit routine. It's a modified, middle-aged version, but she's doing it!



**Bernie** became a dad at the ripe ol' age of 43. (Welcome to the world, Gwen. Your dad is super cool.)



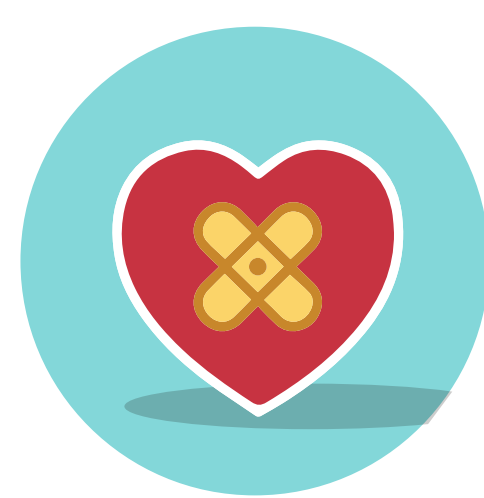
**Janet** persisted through all 18 holes at the famously tough and beautiful Torrey Pines South golf course in California. ("Fore!")



**Jen** launched her eldest (college!) and finished her first "non-improvised" quilt project as a gift for Mom. This confirmed that improv is definitely her thing.



**Heather** finally finished that basement reno and managed to become a top-5 finalist for Canada's Administrative Professional of the Year in the (dusty) process. (Well done, Heather.)



Speaking of Mom, **Matt** supported his mom through successful heart surgery. Then while on vacation in Austria, he totaled a brand new BMW X5 SUV within a quarter mile of the rental car return. (I think we may now know the source of Mom's heart issues.)



Continuing the Mom theme, **Philipia** saw the musical *Michael Jackson* with hers (in a word, "Amazing!"). She also got clear about her own six-word story: "Spark human flourishing through courageous leadership."



To give the dads of the world some love, **Stephane** spent precious one-on-one time with his, and feted the birth of his fifth grandchild.



**Stewart** cheered the arrival of a new grandchild too, and also celebrated his youngest son's wedding at a national park by hiking and rock climbing for a week—NOT your typical "reception."



**Tracey** had two hip replacement surgeries in 2022 and says her life hasn't been the same! (Look out Stewart, she's not far behind.)

### BOTTOM LINE: 2022 AND 2023 WERE EXTRAORDINARY

THANK YOU FOR YOUR EXCEPTIONAL PARTNERSHIP

### WE'RE EXCITED ABOUT 2024



### WE'VE GOT BIG PLANS

THAT WILL FOR SURE HAVE US:

- ✓ Keep designing and delivering programs with gusto on [trusted advisorship](#), [trust-based business development](#), and [trust-based selling](#).
- ✓ Continue to evolve and perfect our blended delivery methods, for the best of both worlds.
- ✓ Experiment further with the intersection of inclusion and trusted advisorship.
- ✓ Strive for greater and greater diversity in our own team.



What inspires you about the new year?

How do you want to become an even bigger champion of relationships done right?

What personal victories will you celebrate at year-end?

**WE STAND BY,**  
READY TO CONTRIBUTE.