

Agenda - Saratoga, California

September 29 - October 1, 2021



Wed, Sept 29, 2021

5:30 – 8:00 PM Opening Reception & Dinner

Basin Restaurant in Saratoga Village

(14471 Big Basin Way)

CMO BOOTCAMP – DAY ONE – Thursday, Sept 30, 2021

Day sessions will be held at Saratoga Country Club, Saratoga, CA

(located at 21990 Prospect Road, Saratoga, CA)

8:00 – 8:30 AM Breakfast

Presentation (8:30 -9:00 AM): Kickoff Session

Led by Kip Knight - Length: 30 min

Key Messages:

- Why we are here and what we want to share with you
- What participants should be able to get out of CMO Bootcamp
- Introductions (faculty and clients)

Presentation (9:00 – 9:30 AM): Changing Role of the CMO

Length: 30 min - Presented by Kip Knight

Key Messages:

- How the CMO role is evolving (and why)
- Root causes on why CMO's fail (and what you can do about it to be successful)

Presentation (9:30 – 10:15 AM): Neuroscience for Marketers

Length: 45 min - Presented by Nancy Zwiers

Key Messages:

- Recent learnings on how consumers process information (and what's compelling)
- How to apply these learnings for better marketing outcomes

Mid-morning Break: 10:15 – 10:45 AM

Presentation (10:45 AM – 12:00 PM): Creating the Right Team, Talent and Focus

Length: 75 min – conversation led by Mike Linton and Carilu Dietrich

- An open discussion between two seasoned CMOs on what it takes to create a winning marketing team and have them grow along with the business



Thursday, Sept 30, 2021 (continued)

Working Lunch (12:00 PM – 1:00 PM): The Power of Personal Failure

- A candid discussion with our CMO Coaches on some of their biggest career setbacks, how they survived (and in some cases thrived), and what they learned from the experience

Presentation (1:00 – 2:00 PM): How to Be A Smarter CMO and More Effective Influencer

Length: 60 min – co-led by Gary Briggs and Alan Gellman

Key Messages:

- Characteristics of successful CMO's in today's rapidly changing marketplace
- Prioritizing the Future While Executing Today: the balancing act that is every CMO's role.
- Leveraging new tools and old tools
- Balancing short term and long-term priorities
- Key steps to building your personal brand within your organization
- How all of this is going to impact how you are judged as a leader (especially when you are new to the role)

Presentation (2:00 – 3:00 PM): How to Create and Foster a Performance-Based Culture

Length: 60 min – moderated by Jennifer Leuer

- Panel discussion on creating a positive culture (and what to do to fix broken ones)

Mid-Afternoon Break: 3:00 – 3:30 PM

Presentation (3:30 – 4:30 PM): How Successful CMO's Create Allies to Get Results

Length: 60 min – Two short talks on the following critical topics:

• How to Partner with your CFO – Mike Linton

- Why the CMO and CFO relationship is the most critical one in the company
- How to “speak marketing” to your CFO
- Common mistakes to avoid in working with your CFO

• Motivating and Working with your Agency – Gary Briggs

- Getting to know the creatives (and vice versa)
- Push them to get to know the product deeply
- Understanding the value of great creative
- Continually challenging the agency (internal ad agency)
- Understanding how agency model is changing (and what to do about it)



Thursday, Sept 30, 2021 (continued)

Presentation (4:30-5:30 PM): Navigating and Leveraging Corporate Politics

Length: 60 min – co-led by Gary Briggs, Alan Gellman and Mike Linton

Key Messages:

- What is corporate politics and why should you care?
- Role of senior management and corporate politics (radical candor)
- How to pick your battles
- How to give and receive tough feedback

Day 1 Wrap-Up Session (5:30 – 5:45 PM) – led by Kip Knight – Summary of Day 1

Bus to take everyone back to Juniper Hotel (5:45PM) ; leaves for dinner at 6:45pm

**Team Dinner (7:00 PM drinks, 7:30 PM dinner) – At Le Papillon in San Jose, CA
(410 Saratoga Ave, San Jose, CA)**

Bus leaves Le Papillon for Juniper Hotel (8:45pm)

CMO BOOTCAMP – DAY TWO – Friday, Oct 1, 2021

8:00 – 8:30 AM Breakfast

Presentation (8:30 – 8:45 AM): Kickoff Session led by Kip Knight

Length: 15 min

Presentation (8:45 – 9:30 AM): So You Want To Join A Board?

Length: 45 min – co-led by Mike Linton and Gary Briggs

Key Messages:

- Types of Boards and role of CEO in managing the Board
- The pros and cons of joining a Board
- Joining Boards:
 - How it works
 - What it takes
 - What to avoid (or at least be wary of)
 - How to go about getting on a Board

Presentation (9:30 – 10:15 AM): How to Effectively Present to the C-Suite and Boards

Length: 45 min – presented by Carilu Dietrich

Key Messages:

- What's personally at stake (and common mistakes) in presenting to the C-Suite, Boards
- Best practices in crafting C-Suite and Board presentations (with examples)
- How to effectively interact with Board members (both in and outside of meetings)



Friday, Oct 1, 2021 (continued)

Mid-Morning Break: 10:15 – 10:45 AM

Presentation (10:45 – 11:30 AM): The Power of AND: Brand AND Performance, Analytics AND Creativity, Internal AND External focus, Strategic AND Tactical, etc.

Length: 45 min – led by Alan Gellman

Key Messages:

- How to find the right balance between strategy and execution
- How to manage your time as CMO

Final Discussion (11:30 – 12:30 PM): The Long Game: Where Your Career Goes from Here

Length: 60 min – led by Jennifer Leuer and Nancy Zwiers

Format: Break into smaller groups moderated by faculty coaches

Key Messages:

- How to manage your future
- How to leverage your networks and relationships
- How to promote your professional “brand”
- What does each person need to do for an “action plan”

Working Lunch (12:30 – 1:30 PM): “Hot Topics” Faculty Panel (including author Rob Chesnut)

Keynote Presentation (1:30-2:30 PM)

Intentional Integrity: How Smart Companies can Lead an Ethical Revolution

Length: 60 min - by Rob Chestnut (author of Intentional Integrity - one of the top 10 business book of 2020)

Key Messages:

- Why integrity matters and why it’s growing in importance
- Six-step process for leaders to foster and manage a culture of integrity at work
- Real world examples and watchouts

Day 2 Wrap-Up Session (2:30 – 2:45 PM)

Call to action, why you need coaching, here’s what you need to do now

Led by Kip Knight

Open Time (2:45-4:30 PM)

Attendees are invited to stay to meet 1:1 with a potential CMO Coach you’d like to work with. All are free to enjoy the rest of the afternoon at Saratoga Country Club or head home/to the airport.