



Onboarding: Birdhouse

What to know during your first months.

When people join your team, there is much for them to learn. Your long-standing employees speak a language spoken only at your company: descriptions of processes, shortcuts, expectations, and more.

Here is an onboarding primer, including a glossary. What do you think? What's missing? What could be better explained?

Preparing for Your First Group Meeting (And Beyond)

Here are recommended steps before your first group meeting:

- *Talk A Person*, a self-introduction guide for your first group meeting. The form is attached; make some notes on it, if that helps you. (Neither submit nor distribute.) This is an informal presentation. If any members are absent, please meet to share your *Talk A Person*. See *Talk A Person* on page 5.
- Meet the other members. Reach out to the other members of the group. See *Birdhouse* on page 2 for a list of online rosters. Visit as many as you can during your first 90 days.
- Our Aim. Make sure you understand the contents of the red box. Ask Artie any questions.
- Scheduling. Write Monica.Leck.Vistage@gmail.com. Monica will get the schedule of group meetings automatically on your calendar. (Monica is your cheerful expert for almost everything.) See *Scheduling* on page 4.

Some Overall Advice

- Everyone is trying to learn how you make decisions, so they can help you advance your decision making (and also so they can try your process for their own decisions).
- Think about these observations from members:
 - "Your story sounds great. But, if you don't show me your numbers and describe your existential fears, I can't help you."
 - "The more you are yourself, the more the group can help you."
- The newest member, arriving for the first meeting, reminds all that we play deep. New members actively question what they hear. "Really?" they ask. And: "Says who?"
- Don't challenge others for sport or because it's part of the process. Challenge them for Good. Be genuine.

Intentions and Assessment

Aim: strengthen our ability to make decisions and solve problems

Method: peer-to-peer influence

Norms:

1. Confidentiality. Know what stories are not yours to tell.
2. Be for each other.
3. Speak genuinely and listen deeply.
4. Receive and offer support and challenge.
5. Generously express appreciation.

Assessment:

Choose the most accurate answer:

I bring top 5 / bottom 5 issues...

- Almost never
- Sometimes
- Every month

In group meetings...

- I deflect to protect.
- I pick my moments to be.
- I am open: mind, heart, and soul.

Each month, beyond the group meeting, I spend time with members...

- 0 hours
- 1 - 2 hours
- > 2 hours

My contribution to lifting Member ROI is...

- I stay out of the way.
- I participate.
- I drive ROI for all.

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- "Vistage is a laboratory for leadership," says Ken Ackerman, central Ohio Vistage chair. What do you want to cook up in this laboratory?
- Conrad Prusak, a Chair in Scottsdale, Ariz., calls Vistage "a test kitchen for the half-baked." It's a safe place to try new ideas. Think your way down the road but not all the way down the road. Bring us your unfinished thinking. Recognize that, like your ideas, all of us are only half-baked.
- Members First. When you think of your presence in the group, act in the best interest of the members.
- You are the new member. For how long? When will you become a trusted member of the team?

Speaking Vistage: A Glossary of Terms

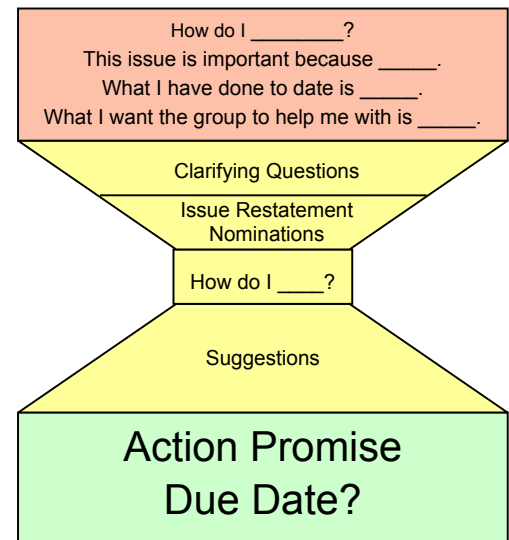
- *Abilene Paradox* — a 40-minute interactive workshop. Psychologist Jerry Harvey describes tension despite agreement, negative fantasies, and the risk and reward of speaking up. *If you haven't seen it, please ask. (It's a good lunchtime meeting for your team.)*
- *Aims* — Aims are different than goals. Aims are intentional directions. (According to W. Edwards Deming, goals are the management of failure, unintentionally producing counter-productive consequences.) **For our aim, read the red box on page 1.**
- *Badinage* — Jocularly, often used to diffuse the tension of the moment. It might be well intended (to rescue the other person, to lighten the mood), but it can have several ill effects: it punctures a moment of depth, and moves the group into Non-Work Mode (see *BAMS* below; *Work Mode* on page 6). When badinage is used to rescue other people, it interrupts others, and we might never hear what they would have said next. And others aren't allowed to completely work through their tension. And they trusts us less, because we halted their contact with their work. And, let's be honest: badinage isn't a tool to rescue the *other* person; we use it to rescue *ourselves*. We rescue ourselves, because we are afraid of the tension of Work Mode.
- *BAMS* — Basic Assumption Mental State. The father of group dynamics, Wilfred Bion defines Non-Work Mode as a basic assumption mental state. BAMS is an unconscious assumption about reality shared by everybody in the group.
- *Birdfeeder* — An event held for members of the Birdhouse, fostering communication and relationship across group boundaries. For information about upcoming programs (and recordings of some previous programs), visit <https://Birdfeeders.info>. Birdfeeders are whenever a speaker presents:
 - to a specific group, and that session is open to other groups and guests
 - on a random day (not any group's monthly meeting) and, like above, it is open to others
- *Birdhouse* — "Birdhouse" is the collected membership of groups chaired by Artie. Here is each group with a link to the current roster:
 - *YES AND* — for CEOs and owners, on the SB platform. <https://artieisaac.com/Y>
 - *Better* — for CEOs and owners of larger companies. <https://artieisaac.com/B>
 - *Key Executives 1* — for key executives. <https://artieisaac.com/K1>
 - *New Key 2* — for key executives. <https://artieisaac.com/NK>
 - *Working Surface* — for solo practitioners. <https://artieisaac.com/WS>
 - *Super Group* — for not-for-profit CEOs. <https://artieisaac.com/S>
 - *Bi-Con Inside* — a Vistage Inside group for the leadership team of [Bi-Con Services](#)
 - *The Garden Round* — for post-exit life
- *Box Process ("The Box")* — An issue processing experience where everyone presents in small groups with interruptive time constraints. See *Issue Processing* on page 3.

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- *Buddy Lunch* — Each month, every member invites another member to lunch. Or coffee. Or a conversation. For one-to-one issue processing, relationship development, familiarity. (Member-member relationships are more important than member-chair relationships.) Wondering whom to invite to a Buddy Lunch? How about the person you know (or like) the least?
- *Chairs* — 700+ leaders of Vistage peer groups around the world, serving — in the United States — as 1099 subcontractors. There are other talented Vistage chairs in central Ohio: [Ken Ackerman](#), [Perry Maughmer](#), [John McNeal](#), [Darci Williams](#), [Sue Reninger](#), [Ian Kalinosky](#), and [Shannon Lee](#). There are many talented Vistage Chairs in Cincinnati. *When you are ready to meet — or be — a chair, tell Artie.*
- **Confidentiality** — All your Member ROI is based on this. See *Norms* on page 1. There is no spousal exemption. You can say, "I think I'm going to try this..." But you must not say, "Because of what I heard, I am going to try this..." Use the learning without even the vaguest attribution. Some limits:
 - Our conversations are not protected by client-attorney privilege. Members and the Chair can be subpoenaed.
 - If you are deemed a danger to yourself or others, Artie reserves the right to inform others.
 - If you break a big law (much bigger than jaywalking), Artie reserves the right to inform others.
 - If you are a Key Executive member and you have taken another job, Artie reserves the right to inform your sponsoring CEO. In this case, you will be given a 24-hour headstart.
 - Please know that group members have administrative colleagues who read their email. There are also Vistage administrators who have access to all areas on *MyVistage*.
- *Emotional Intelligence* — We care about more than your thoughts. We want to know your emotions. We will ask you, "What are you feeling?" because we want to join you in the emotion. This helps everyone offer more than their considerable brains: their considerable hearts. If you want to delve deeper into your emotional intelligence, ask Artie to take the EQi 2.0 assessment.
- *Goals* — Set goals if you must, but do not be obsessed by them. Professor Rao teaches, "Goals are useful only inasmuch as they set direction." That's why, like Dr. Deming, we establish "aims" rather than "goals." Here are these six aims to have ready for your first (or second) meeting:
 - Relationship: Your pursuit of this aim helps someone else pursue their aims.
 - Wealth: Beyond financial ambitions, this embraces the broader riches of life.
 - Intellectual: How can you strengthen — and tickle — your brain?
 - Physical: How can you strengthen your body, lengthen your longevity, enjoy better health?
 - Spiritual: How you develop greater inner peace, and greater peace on Earth?
 - Community: How you increase your Member ROI and the ROI for your peers?
- *HDI* — What are you wondering? What is your obstacle? Please put that in the form of question. We ask for these questions start: "How do I...?" We call these questions HDIs, and we prefer them to questions that start "Why is the world..." and "Who the heck...?" HDIs are practical questions about what to do next.
- *Homework Policy* — Everything is optional, except *get to the meeting*. As Chair Bill Houston says "**Our peer group is an event, not an assignment. Our peer group appears on your calendar, not on your To Do List.**"
- *Huddles* — Some groups like to have a standing Zoom meeting, chaired by a member.
- *I Am From* — an activity that produces an autobiographical reflection in open verse.
- *Issue Processing* — At right is our fundamental process for addressing challenges and opportunities. We separate questions from advice. See *Questions, three levels of* on page 5.

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- *Issue Processing Advance Worksheet* — Please submit (to the group) an Issue Processing Worksheet a week in advance, so it can be digested before the meeting. The idea: You have an obligation to bring your greatest issue. (See page 9-10.)
- *Meditation, The Pause*. Sometimes we start a session with The Pause, a few slow breaths.
- *Message in a Bottle, Birdhouse Monthly Summary* — on the first of each month, Artie sends a few question. *Please Reply All*.
- *Monica Leck* — *Monica.Leck.Vistage@gmail.com* (614-537-2342) handles all scheduling. Monica also reads all Artie's email and responds when she has the answer. (If you want to reach Artie same day, text him at 614-395-3965.)
- *MyVistage.com* — Vistage members can reach 45,000+ members around the world. If you are having any difficulty with *MyVistage.com*, ask Monica for a lesson in navigation.
- *Neurosis of the Moment*. Every group experiences moments of neurosis. The leader in any moment is the person who can accurately identify the neurosis of the group, aloud, in the moment. Examples: *BAMS* and *Abilene Paradox* on page 2.
- *No soliciting*. Please preserve the Birdhouse (and the larger Vistage membership) as a non-solicitation community. You can ask others for their professional help. You can buy products and services from others. But, please, don't offer your services, lest you become known as a Seller At The Table (rather than as a vendor or consultant). If a member-to-member business relationship becomes too significant, we might all decide it best to move one of the members to another group. (That's not a bad thing. It's just a thing.)
- *One-word Barometer* — After breaks and sometimes unexpectedly, we will share one-word descriptions of our mood. It's a way to take a quick pulse on the mood in the room and to know our own mood, especially if someone saw an email during the break that rattled equanimity. Knowing your own mood is a core leadership competency, because — frankly — everyone else can tell your mood. You might as well know what it is!
- **Promises** — See our norms in the red box on page 1. Here are our previous norms (until 2023). They still work as our promises to one another, aspirations we confirm by taking our seats:
 - **I attend**. My presence is critical. If I am frequently absent, I'll be an agenda item.
 - **I deserve trust**. In our test kitchen for the half-baked, I don't breach confidentiality. Your story isn't mine to tell, unless allowed.
 - **I turn on**. I pay attention. I will focus on the people in this room.
 - **I speak up**. My voice is my contribution. *SILENCE = 100% AGREEMENT*
 - **I offer deep issues**. I am always ready with my top 5% and bottom 5%. (See *Top 5 / Bottom 5* on page 6.) I am open and transparent. I welcome vulnerability.
 - **I rally**. I respond to you. I work to join your Tiger Team. I won't silently watch you fail.
 - **I act**. I do not unnecessarily hesitate with the input from the group. No whining.
 - **I see you as a peer**. I value you as an equal. I respect your choices. I question your answers with agenda-free advice.



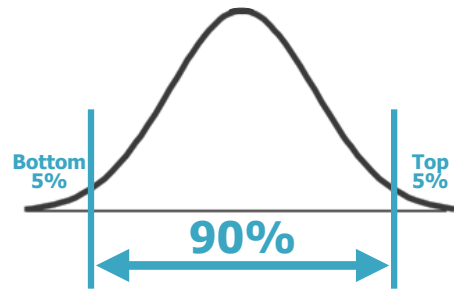
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- **I enjoy life.** Business and life are serious, and must be fun and rewarding. Help me be humble, laugh at myself, and enjoy the ride. (But, please, know badinage.)
- *Questions, three levels of* — What motivates your asking each type of question:
 1. Fact-finding: these are technical questions. *Who? What? Where? When? How?*
 2. Proscriptive: these are questions that suggest a solution. *Have you considered keeping a journal?*
 3. Wonderment: these questions are truly open-ended, based on curiosity, sparked by the most recent words heard, without judgement. The question cannot be prepared in advance; it arises in the moment. *Why?* It is preceded by an unspoken, humble, *"I'm confused, so let me ask..."* A favorite series of Third Level Questions: *What? ... So what? ... What now?*
- *Referrals.* The more insights around the table, the better for all. Please send membership candidates to Artie, Monica, or <https://artieisaac.com>. Who do you know nearby or across the country who might benefit from membership?
- *Retreat* — Yearly, each group retreats overnight in Yellow Springs, Ohio, a small, peaceful village. Please respect the local culture of privacy and dignity. *The world is not your oyster.*
- *San Diego.* There is a team of Vistage employees in San Diego, where the main Vistage corporation is. (Vistage members are customers of the Vistage corporation. Artie is a 1099 sub-contractor.) Alexandria Fagen (alexandria.fagen@vistage.com) can answer any question about Vistage, especially when Artie and Monica are stumped.
- *Scheduling with Artie.* Monica is ready to schedule Artie and you to meet by phone or on Zoom. If you need to schedule or change an appointment, contact Monica at Monica.Leck.Vistage@gmail.com. **If you need to cancel on the day of the appointment**, please text Artie at 614-395-3965.
- *Surveys* — On days when we have a speaker in our group, you can visit the Vistage app to rate the speaker. Please rate all our speakers a "5." While a 1-5 scale might seem to invite 4s, here is the practical effect: 5 means *adequate or better*; 4, *miserable*; 3, *scurrilous*; 2, *damnable*; and 1, *scurrilously damnable*. That's how the date is used by chairs when they are considering bringing in a speaker.
- **TAKE ACTION** — A method for closing a group meeting. A key takeaway, a conversation you want, a next action, and a quotable phrase.
- *Telephone* — Artie won't talk to you while you are driving a car, because he encourages your contact with the subject, drawing your focus away from your safety. Artie does not want to attract your attention, and then listen to the potentially fatal results. *Now here's a contradiction, which some people protest as "hypocritical" and "absurd."* Artie will talk to you while he is operating a car on the Interstate, claiming that Tesla Autopilot keeps him safe. *Protest is futile. This is an opportunity to help you develop your skill with inconsistency.*
- *Talk A Person* — A self-introduction guide for a member at the first group meeting. See page 8; make some notes on it, if that helps you. (It is not submitted or distributed.) This is a 10-minute, informal presentation. If any members are absent, please meet to share your *Talk A Person*.
- *Terminating your membership.* Wait, what? You just onboarding now! Oh, well. If you want to quit Vistage, tell your group why. (Artie won't speak for you.) And let Vistage know; that starts the three-month termination period. For the regrettable details, please visit <https://ArtieIsaac.com/quit>.
- *Tiger Team* — When a member has an issue that cannot wait for the next monthly group meeting, a Tiger Team is called. Anyone can call a Tiger Team: for one's own self, or for another member. The Calling Member first schedules with the one other member whose presence the Calling Member deems most essential. Then the Calling Member sends an email to everyone, naming the time and place. Ideally, the Calling Member would also provide a complete *Issue Processing Advance Worksheet* (see

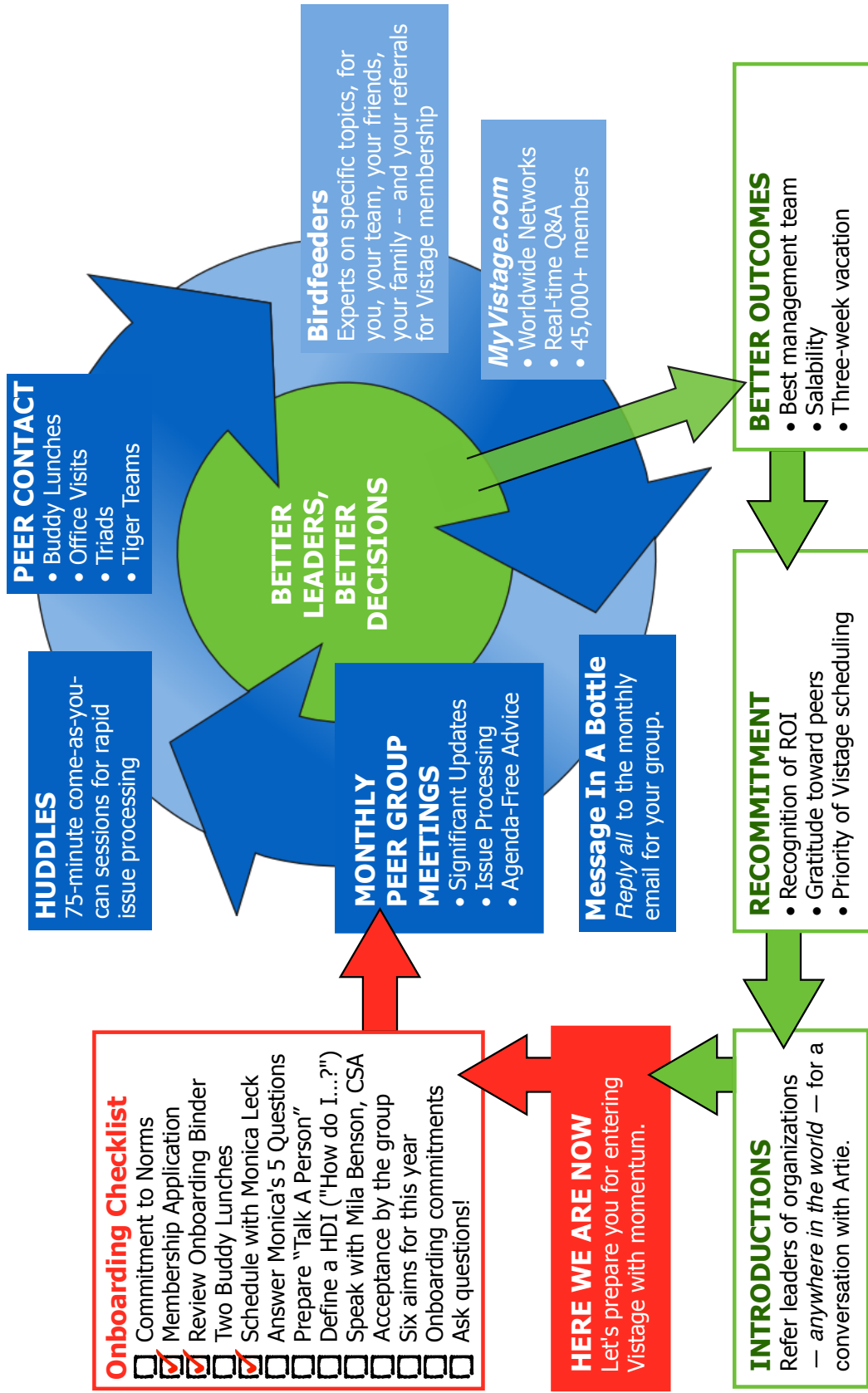
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pages 9-10). Members RSVP immediately and attend if they can. The Calling Member names a Chair for the meeting from among the attending members, so that the Calling Member can more fully participate. Sometimes, the Calling Member offers a meal.

- *Top 5 / Bottom 5* — In our lives, 90% of our experiences can be shared with others: with our workmates, our friends, our beloveds, our trusted advisors. But 5% of life is so thrilling ("Top 5") and 5% of life is so frightening ("Bottom 5") that these experiences cannot be shared with anyone. Our meetings provide the highest ROI when we focus on the Top 5% and Bottom 5% of life. *Consider this: No event is inherently good or bad. Suffering begins when we label an event as "good" or "bad."*
- *Triad* — Unless the member prefers not to participate, each member is placed in a Triad, which is a monthly meeting of the same three (or more) members. *If you want to be in a Triad, tell Monica.*
- *Work Mode* — one of two states of a group, according to father of group dynamics, Wilfred Bion. In Work Mode, the group pursues a task that it understands and agrees on in a way that is rational, scientific (empirical), cooperative, controlled, and conscious. Work often surfaces issues that produce anxiety. The issue is either worked (work mode) or the group avoids the anxiety (non-work). When a group is working, it is fully conscious and fully functional. For contrast, see *BAMS* on page 2.
- *Zoom*. Artie maintains this video-conferencing space: <https://zoom.us/j/2858888377>. If you are asked for a password, try: Ruth.



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Chair
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VISTAGE
Private advisory boards for CEOs, executives and business owners.

Send prospective members to artieisaac.com.

TALK A PERSON

New Member Introduction

Informal — 5-7 Minutes — Expect Questions

Name, company, title? How do you make money?
Number of employees? Annual revenues?
To what extent do you understand your financial statements?
What is the value of your enterprise?
What percent of the way are you to having enough to retire?
Who is your boss? Who do you love? Who is your tribe?

What do you drive and why?

How did you find your way to Vistage?

What do you do well?
On what subjects
are you an expert?

What education and
knowledge do you use
in your job?

What do you care
deeply about? What is
most important to you?

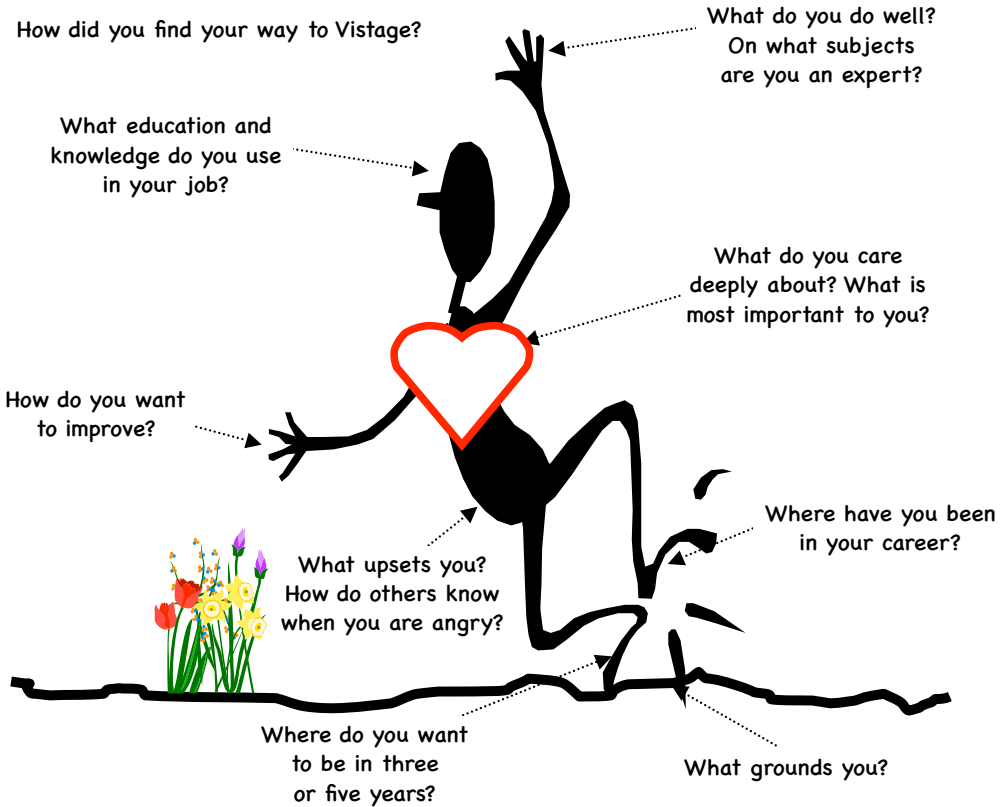
How do you want
to improve?

Where have you been
in your career?

What upsets you?
How do others know
when you are angry?

Where do you want
to be in three
or five years?

What grounds you?



Issue Processing Advance Worksheet



Name: _____ Date: _____

How I'd like to address the issue (select one):

- Experience Sharing** — Describe a similar experience, what you did, and the result.
- Brainstorm** — Give me as many ideas as you can - without filter.
- Discussion** — Let's have a conversation about this.
- Name The Issue** — Naming the problem or opportunity would help.
- Identify My Role** — Tell me what you think my role is.
- Issue Processing** — Ask clarifying questions, suggest issue restatement, give advice.

What is the issue? Just the headline, in not more than two sentences.

HDI

Why is this significant? What is the current effect on you and others, in dollars and time?

What are the future implications?

What do you want to happen? What would the ideal outcome look like?

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Issue Processing Advance Worksheet, page 2

What is the background? How/when/where/why did it start? Who are the players?
What are the internal and external forces? What is today's focus?

What are your options? (Identify the next step you currently plan to take.)

What input do you want from the group? What do you NOT want from the group?

Optional next steps:

- Add supporting documents.**
- Distribute to the group.** (Reminder: members have email monitors.)
- Call a Tiger Team:**
 1. Schedule with the member you most want there.
 2. Invite everyone.
 3. Recruit a meeting chair.

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Onboarding Worksheet

Here is what I plan to do to ensure that I am integrated into the group:

My next action:

By when:



BETTER OUTCOMES

-
-
-

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A Birdhouse Bibliography

These books are recommended:

- [*The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It*](#) by Michael E. Gerber
- [*Man's Search for Meaning*](#) by Viktor E. Frankl
- [*Getting Things Done: The Art of Stress-Free Productivity*](#) by David Allen
- [*That's What She Said: What Men and Women Need To Know About Working Together*](#) by Joanne Lipman
- [*Between the World and Me*](#) by Ta-Nehisi Coates
- [*Change Your Questions, Change Your Life: 12 Powerful Tools for Leadership, Coaching, and Life*](#) by Marilee Adams, Ph.D.
- [*Fierce Conversations: Achieving Success at Work and in Life One Conversation at a Time*](#) by Susan Scott
- [*Talking to Strangers: What We Should Know about the People We Don't Know*](#) by Malcolm Gladwell
- [*Leave It to Psmith*](#) by P. G. Wodehouse
- [*The Goal: A Process of Ongoing Improvement*](#) (or [*graphic novel version*](#)) by Eliyahu M. Goldratt
- [*The New Economics for Industry, Government, Education*](#) and [*Out of the Crisis*](#) by W. Edwards Deming
- [*Are YOU Ready to Succeed?: Unconventional Strategies for Achieving Personal Mastery in Business and Life*](#) by Dr. Srikumar S. Rao
- [*Don't Take Dieting Advice From A Skinny Person: Doctor Alok's Guide To Overcoming Food Addiction And Finally Losing Weight*](#) by Alok Kalia, M.D.
- "Management Time: Who's Got the Monkey?", *HBR*, by William Oncken, Jr. and Donald L. Wass
- "Crucibles of Leadership", *HBR*, by Warren Bennis and Robert J. Thomas
- [*The Artist's Way: 25th Anniversary Edition*](#) by Julia Cameron
- [*Finish Big: How Great Entrepreneurs Exit Their Companies on Top*](#) by Bo Burlingham
- [*Traction: Get a Grip on Your Business*](#) and [*Rocket Fuel: The One Essential Combination...*](#), Gino Wickman and others

...and watch videos by Mike Carr, Tom Foster, and Chalmers Brothers at <http://Birdfeeders.info>

What is Vistage?

Vistage International is the world's leading chief executive organization with more than 45,000 members worldwide. Through peer influence, Vistage provides new perspectives, innovative strategies and actionable ideas to people who run enterprises.



And what's The Birdhouse?

The Birdhouse is the combined membership of peer groups chaired in Ohio by Artie Isaac. Please refer candidates to artieisaac.com.

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An Afterthought

The perspective of Iain Lindsey, a former Vistage chair in the United Kingdom...

TRAITS OF PEOPLE WHO THRIVE IN THE VISTAGE ENVIRONMENT:

- *Willing Openness* - prepared to put the real stuff on the table
- *Continual Learners* - want to be the best Chief Executive, and person, that they can
- *Challenge 1* - want their plans and thinking to be challenged by the group and
- *Challenge 2* - recognize their responsibility to challenge other members, even if they are the only one with a contrary view to the rest of the group.
- *Listeners* - they listen, reflect and take considered action
- *Flexible* - are prepared to take onboard ideas, comments and inputs from fellow members, speakers, and the group chair
- *Committed to Action* - Vistage is not a talking shop; while the group can't impose solutions, members must take action after issue discussions, host presentations, speaker sessions etc.
- *Time* - happy to, and understand the need to, invest time in communication, preparation, attendance and follow-up to Group meetings and 121s
- *IT literate* - able, or willing to learn how, to communicate effectively by e-mail, WhatsApp, zoom, and respond quickly, ties in with
- *Measurement* - want to develop and monitor appropriate KPIs for their business and personal lives
- *Craic/Hwyl/Passion/Fun* - want to have fun along the way, "no miserable b*****s"
- *Have needs/issues* that membership of Vistage can address
- Have got an *interactive learning style*
- *Add value* to the existing members
- *Contribute actively* to discussions
- Meet the "gym" not "hospital ward" criteria
- *Confident yet modest* about themselves and their company
- They are a person and a company that the *group members enjoy* getting their teeth into
- Have a *glass half-full* mentality