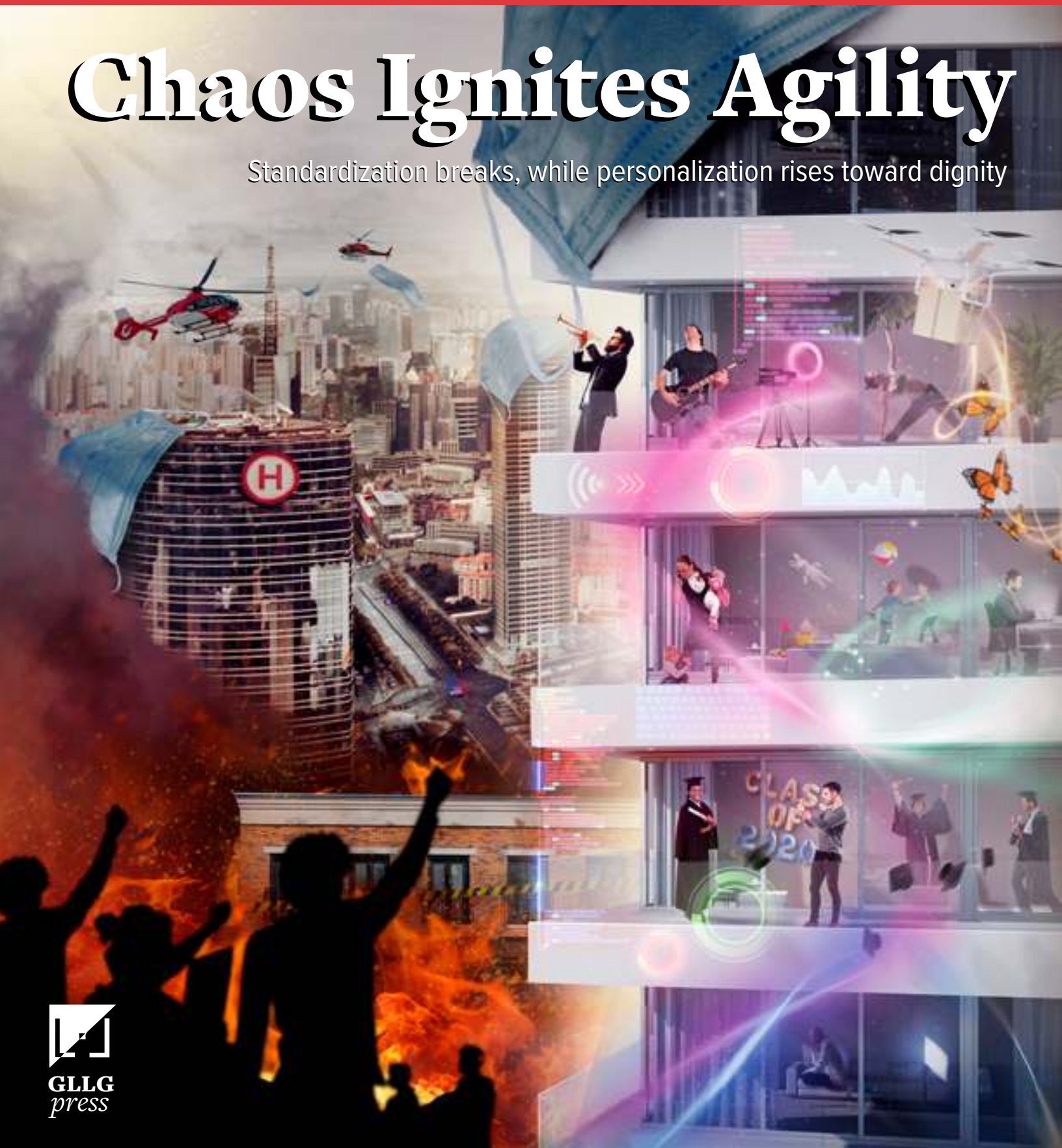
LEADERSHIP IN THE AGE OF PERSONALIZATION®

In a year unlike any other, leaders across business, healthcare and education came together to share how they're working to restore individual dignity in the ways they serve patients, customers, employees and students. Society needs us, and we need each other. This is Leadership in the Age of Personalization.

Chaos Ignites Agility

Standardization breaks, while personalization rises toward dignity



GLLG press

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CONTENTS

1 / INTRO

6 / Convergence - Up, Down, Across And Around
7 / We All Share The Same Major Obstacle
8 / We're All Solving For The Same Things
9 / Start With Relevance
11 / The Way To Individual Relevance
12 / Opportunities are Everywhere

13 / PART 1
How To Put Patients, Employees And Students At The Center – To Activate Individual Capacity

14 / Pay Attention to Our Massive Identity Crisis
15 / Build Systems for Understanding Multiple Dimensions of Individuals
18 / Learn From Each Other
20 / Bring People In

23 / PART 2
How To Lead Through Industry Transformation When There's So Much Uncertainty

25 / Recognize that Transformation is Happening: Ready or Not
27 / Find the Balance Between Legacy and Startup Mentality
29 / Make the Effort: Develop Your Leaders

31 / PART 3
How To Pursue And Employ Inclusion As A Growth Strategy Going Forward

33 / Inclusion Requires Designing for Others
35 / Put Technology to Use – AND Respect Its Limitations
37 / Inclusion Starts and Ends With the Culture You Create

40 / CONCLUSION

42 / Acknowledgments

INTRO

“Most companies are not prepared for what is about to hit them.”

– Nik Modi, Managing Director, RBC Capital Markets

Wall Street Alert
Watch full series at **ageofpersonalization.com**

That was a prediction from RBC Capital Markets Managing Director Nik Modi – a prediction he made back in 2019 at our Leadership in the Age of Personalization Executive Summit - in Huntington Beach - CA.

Before Covid.

There was no way for Modi to know the extent to which his prediction would be true. None of us were ready for what 2020 threw at us. How could we be?

Many people have suffered truly heartbreaking losses throughout the events of 2020, on levels both personal and professional. And all of us have had to adapt and change something about our lives and about the way we work and lead.

When Modi made that statement, he was calling attention to society's shift from an age of standardization to an age of personalization – and calling out our public and private institutions for their lack of readiness for that shift. The big challenge in that pre-pandemic moment was to awaken leaders who were ignoring the momentum behind this movement toward leading with personalization:

- momentum from technologies that enable transformative levels of personalization in every area of our lives,
- momentum from the increasingly diverse younger generations who are not inclined to assimilate to standards that are no longer relevant, and
- momentum from the increasing speed of change and transformation.

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Today, in early 2021, no one can deny the shifts we're undergoing.

We've all seen first-hand: the old ways don't work anymore.

Over the past year, we've watched our old ways disappear as we've adapted the ways we work, serve and learn. And what happened? We became more interconnected and interdependent. We had to. It wasn't perfect. There were and are hiccups and struggles and frustrations. But we've now seen and experienced how much we need each other – and how much we can accomplish when we change our ways together.

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Photo by Dean Drobot at Shutterstock.com

After his participation in the 2019 summit, Fairfield University, Professor of Anthropology Scott Lacy, Ph.D., was inspired by the enthusiasm of leaders across industries to collaboratively explore leadership in the age of personalization. In 2020, GLLG and Fairfield were in the process of expanding the summit into a three-day event on the Fairfield campus when the pandemic shut everything down. With all the restrictions, it seemed the summit might have to be postponed. But we started seeing how society was adapting with online events and flexible attitudes.

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2020 Summit Production - Westport Library

Amidst the chaos we tapped into our own agility: we partnered with Connecticut's Westport Library as a well-equipped location for the main hosts, and with Lightspeed VT for the online logistics of registration and streaming. Speakers participated from their own homes and offices, while participants watched live and on demand. The summit itself is a microcosm for how all of us have had to be agile enough to adapt during a time of daily uncertainty.

2020 Summit Production - Westport Library

Agility, adaptation, uncertainty, leadership...

that's what the 2020 Leadership in the Age of Personalization Virtual Summit was all about.

2020 Summit Production - Westport Library

CONVERGENCE – UP, DOWN, ACROSS AND AROUND

What has become clear throughout this past year:

- No matter your sector – healthcare, corporate, higher education – we are all solving for the same things.
- No matter your title, every one of us must contribute at our fullest capacities.

For that reason, 46 leaders across all three realms and representing a range of roles gathered virtually over three full days in October for the 2020 Leadership in the Age of Personalization Virtual Summit, hosted by Fairfield University, to engage in lively conversations about how we can help each other shift from ruling by standardization to leading with personalization.

Doctors, professors, executives, deans, presidents and more shared their thoughts and expertise on:

- How to put patients, employees and students at the center – to activate individual capacity.
- How to lead through industry transformation when there's so much uncertainty.
- How to pursue and employ inclusion as a growth strategy going forward.

Whatever you're trying to accomplish, you need people at their fullest capacities connecting with and elevating each other as they contribute to a shared mission – individually and collectively.

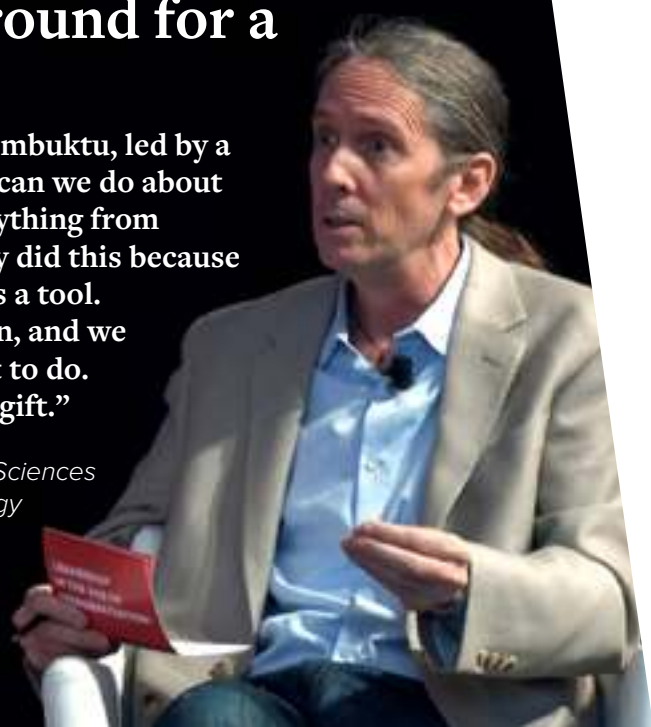
Humans Already Know How to Do This

Let's put convergence into practice by consulting the wisdom of someone with expertise beyond your typical management consultant: an anthropologist.

"If we zoom out on the human experience, we find solutions that have been around for a long time.

There was a small university system in the Middle Ages in Timbuktu, led by a woman. They didn't have majors, they had questions: 'What can we do about hunger?' They spent their time reading and talking about anything from philosophy to science, whatever discipline they needed. They did this because the discipline itself wasn't their trajectory or life path. It was a tool. Their life path was the question. This is our human condition, and we all receive the gift. It doesn't mean we tell other people what to do. We see what they're going to do with their one and precious gift."

– Scott Lacy, Associate Dean of the College of Arts and Sciences and Professor of Anthropology



WE ALL SHARE THE SAME MAJOR OBSTACLE: SUPPRESSED INDIVIDUALITY

Many of the challenges we're dealing with today are rooted in this unfortunate truth - we've ignored and suppressed people's individuality at every turn:

1. In the way our healthcare system forces people to adapt to the system rather than the system adapting to individuals.

2. In the way our corporations demand loyalty to brand at the expense of our humanity.

3. In the way higher education rewards only those who accomplish narrowly defined versions of success rather than those who create their own paths to distinction.

The way of dignity elevates and activates our humanity so we can realize and exceed our individual capacity.

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WE'RE ALL SOLVING FOR THE SAME THINGS

1. UNPREDICTABLE TRANSFORMATION

"Never allow your current situation to determine your destination."
Tyjaun Lee, Campus President, Penn Valley at Metropolitan Community College

"Digital health has become the fastest evolving segment of patient care by a significant distance."
Daniel Perez, CEO/Co-Founder, Hinge Health

"Consumer changes are not slowing down, they're accelerating."
Stephanie Lloyd, Head of New Ventures and President of Toggle and Farmers Insurance

2. PUTTING PEOPLE AT THE CENTER

"Strategy without empathy is a wasted idea."
Brian Garish, President Banfield Pet Hospital

"We have a completely different demographic of what a typical higher education student looks like. Half are over 25, part-time, 50% work full time, 25% have families of their own."
Nancy Hubbard, DPhil, Dean and Professor at the University of Lynchburg College of Business

"There's a mindset shift required."
Bob Monteverdi, Executive Healthcare Leader, Product Management, Physician & General Manager, Lenovo Health

3. PURSUIT OF TRUE INCLUSION

"It's absolutely about a cultural shift and opening up the definition of multidisciplinary."
Shaden Marzouk, President, CareMore and Aspire at Anthem

"As a business necessity, we want people to show up and be their full, authentic selves."
Dalana Brand, VP People Experience and Head of Diversity & Inclusion, Twitter

"Not everybody teaches the same way. Not everybody learns the same way."
Tomas Gomez-Arias, Dean of the College of Business Administration, California State University, Stanislaus

START WITH RELEVANCE

What matters to you right now?

What matters to your patient right now? What matters to your employees right now? What matters to your customers right now? What matters to your students right now?

Dr. Jack Cox kicked off Day 1 by introducing this idea and this question, which set the tone for the entire summit.

"One of the biggest challenges that we have in healthcare is the way that we're reimbursed for sick care and procedures rather than health and wellness, which is what most individuals want. Organizations get paid to replace your hip rather than to help you lose weight. We don't have good systems for asking individuals, 'What matters to you?' So we end up delivering a lot of care based on OUR models of quality and value, instead of focusing on what's important to patients."

– Jack Cox, MD, MMM

Healthcare in the Age of Personalization
Watch full series at **ageofpersonalization.com**

We can't determine value if we're not considering what is relevant to the individual.

The old way:

$$\text{Value} = \frac{\text{Quality}}{\text{Cost}}$$

The way of dignity:

$$\text{Value} = \frac{\text{Quality}}{\text{Cost}} * \text{Relevance}$$

There's a similar dynamic in higher education, where many traditions have been entrenched for centuries.

"We've done a great job of telling our students what success is, and that just doesn't work. I want to really make sure that the personalization comes in terms of making sure that our students understand how to define success for themselves. What is it that they want to do? Not what is it that we want them to do."

– Adlai Wertman, David C. Bohnett Professor of Social Entrepreneurship and Founding Director of Brittingham Social Enterprise Lab at the USC Marshall School of Business

Higher Education in the Age of Personalization
Watch full series at **ageofpersonalization.com**

Corporate is dealing with the importance of relevance in concrete ways. Leaders are trying to determine what skills and expertise are relevant to their business, while people are trying to rescue the identities they've lost throughout lives of standardization – to discover what they are uniquely suited to solve for.

"In order for you to understand relevance to anyone, you have to engage with them, you have to talk with them and it has to be done in a meaningful and two-way conversation. If that becomes who you are at your core – the ability to truly listen at scale, connect with people, see people for who they are, understand them for what what's important to them – then you'll always have at least an idea of what's relevant because now it's a conversation."

– Brian Garish, President, Banfield Pet Hospital

Success and survival is becoming less about the organization defining the individual, and more about the individual defining the organization.

THE WAY TO INDIVIDUAL RELEVANCE:

Shift from Ruling by Standardization to Leading with Personalization

Standardization

The organization defines the individual.

- We feel boxed in, afraid or unable to contribute at full capacity.
- Progress toward the stated mission is what matters and is measured.
- We protect our functions and work within our silos.

The result:
a model that holds people to conformity and limits creativity.

Personalization

The individual defines the process toward the mission.

- Our individual capacities are elevated and activated; we have influence.
- Progress toward individual impact and legacy is what matters and is measured.
- We value and seek interdependence across the enterprise.

The result:
a model that benefits from individual and unique contributions.

OPPORTUNITIES ARE EVERYWHERE: DO YOU HAVE EYES TO SEE THEM?

"When there's trust and transparency and you actually open the game of work to let individuals play, they can help you solve your problems. And your business outcomes are positive."

– Kristin Gwinner, Executive Vice President and Chief Human Resources Officer at Chico's FAS, Inc.

"This is probably the biggest single opportunity we've had to re-examine how we deliver higher education since the 15th century."

– Wendy York, Dean of Wilbur O. and Ann Powers College of Business at Clemson University

"Last year we were the first state to have a subscription model for access to these medications, and that happened because we created a sense of urgency, a sense of discomfort with where we were."

– Dr. Rebekah Gee, CEO of Health Care Services for LSU Health

PART 1

HOW TO PUT PATIENTS, EMPLOYEES AND STUDENTS AT THE CENTER – TO ACTIVATE INDIVIDUAL CAPACITY.

The Way of Dignity

When we shift our focus from brand identity to individual identities, we invigorate our shared missions by elevating individual contribution.

There's nothing less dignified than putting the interests of a brand or an institution over the interests of the individuals whose blood, sweat and tears make that institution great. What is most meaningful to people is to know they have a chance to contribute their unique skills and strengths – no matter the mission.

Glenn Llopis at our Leadership in the Age of Personalization 2020 Virtual Summit

How We Get There

People want to get in the game – whether we're talking about employees contributing to your organization's mission, students having a say in how they develop their knowledge and skills, or patients having a voice in their own path to health and wellness.

But they don't always know how to get in the game, and they don't always trust it once they are – because in the age of standardization they weren't given permission or opportunities to play.

Organizations have been saying for years that they are patient-, consumer-, employee- and student-centered. This is only partially true. Standardization in its current form has placed limitations to what centricity really means and the tension this artificial reality has created.

To be customer-centric means placing the whole person (patient, employee, student) at the center of transformation, to guide how the institution should work, lead and conduct business.

Pay Attention to Our Massive Identity Crisis

Historically our organizations have defined the individual, which means we've been conditioned to work or learn inside the box we're given. Now that we're in an age of personalization, where the individual defines the organization – we have to get to know ourselves all over again.

The identity crisis is a condition brought on by years of standardization:

- Employees have lost their identity,
- They don't know what their full individual capacity is,
- They haven't been given the freedom or room to contribute in their own way, and
- It's hard for people to discover what makes one distinct, unique and special.

We learned at the summit that this identity crisis actually begins in school and continues throughout our careers. By the time we enter the workforce, we've already lost ourselves to the standardization related to taking the right courses in high school, parroting the right answers on all standardized tests, meeting the rigid entrance qualifications for college, following the predetermined path toward an acceptable degree that the most desirable employers will deem appropriate. Then those employers dictate our career paths and the metrics by which our progress and promotions are measured.

Talk about limiting an individual!

"The only way we're going to spark a meaningful debate is to be really contentious. So I am all in.

I think that the issue with higher ed at this point is the entire system is set up for standardization. You are told what you can major in. You are told how many credits you need to take each semester. Even when you go for advising you're not asked, what do you want to learn about? Or what do you want to do? You're asked, what do you want to major in? The whole system is really set up for almost a factory line of standardized learning outcomes. And when you come out, even your employers have been trained to ask for people who have certain majors."

– Nancy Hubbard, DPhil, Dean and Professor at the University of Lynchburg College of Business

Higher Ed's Reinvention
Watch full series at **ageofpersonalization.com**

Build Systems for Understanding Multiple Dimensions of Individuals

We need to move away from job titles and job descriptions as an identifier of how an individual can contribute. Wouldn't it better if we could know things like: what do you consistently think about in a big way? What problems are you drawn to? What kinds of solutions do you favor and are especially suited to offer?

When you know what you solve for, that's when you make your most meaningful contribution to any mission. Knowing what you solve for is a continuous journey of personal exploration and reinvention, as you evolve through school and career.

"If you think about the admissions process for any university, we ask them a set of very generic questions.

But instead, we could use focused technology-led assessment tools, where we are understanding what the student already knows, what the student does not know, and what is the future potential of each student. And once we have this information, we can create a guidance system where the student is being directed to learn in a way that is helping them achieve what they want. We want to create a rich transcript that is truly indicative of what this person has learned and what this person can do."

– Sandeep Krishnamurthy, Dean of the AACSB-accredited School of Business, University of Washington, Bothell

Enriching the Student Experience
Watch full series at **ageofpersonalization.com**

"As we talk about the student experience, I think it's important to reinforce that there are people having experiences, not objects to be packaged and promoted and distributed. Education isn't just about cognitive development and the acquisition of skills and knowledge. It's also about physical development, emotional development, moral development, social development.

Education should serve the development of the whole person."

– Bill Hulseman, Independent Consultant, Academia

How do we build the right systems that will help us know people well enough so we can interrupt our own assumptions about who belongs where, doing what?

"The way that you can truly disrupt organizations and teams is by pooling people with [varied] life experiences and professional experiences to help teams think differently. [To do that] we need to better understand the skills, capabilities and experiences of our people. We've got great talent, but the only view we have of them is life after they came to Microsoft. [We want to] understand the whole person."

– Monica Pool-Knox, Microsoft Global Head of Human Resources (for AI Platform, Mixed Reality & Cloud Security, Identity)

Reinventing Talent Management
Watch full series at **ageofpersonalization.com**

How do you serve the whole student or patient or customer? You first have to get to know the whole person by being deliberate about it. Given all the external forces that people are dealing with as individuals, how do you make it safe and possible for them to tell you what they're really grappling with?

"Our academic advisors give a survey before [students are] even enrolled so that we can understand what their out-of-school obligations are. From there, the advisors will work with the students to provide them with a schedule that will meet their external lives. 'Guided Pathways' [a program funded by the Bill and Melinda Gates Foundation] creates focus meta-majors. Instead of the traditional campus cafeteria-style model, students are able to pick the program that they want to go in under this meta-major. It allows students to try a program without being fully committed to the program.

We looked at our business processes that create unintentional barriers so that we can remove those barriers from the student experience."

– Tyjaun Lee, Campus President, Penn Valley at Metropolitan Community College

"We're focused on chronic conditions and where the patient has to be an active participant. If you imagine prescribing somebody physical therapy for multiple months: they've got to find a babysitter, sit in traffic, take time off work. They probably have to pay a copay. It can be remarkably onerous. But digital health companies could use technology to better deliver that evidence-based care, and rapidly iterate on how the care is delivered to improve adherence.

We can adjust the intensity of an exercise regime in real time."

– Daniel Perez, CEO/Co-Founder, Hinge Health

"I once heard someone say that in 10 minutes, a great nurse knows more about you than your family does. And I think about it and that's personalization, right?"

– Dana Woods, Chief Executive Officer, American Association of Critical-Care Nurses (AACN)

Learn From Each Other

We purposely designed this year's summit to bring together leaders across three seemingly separate sectors – healthcare, corporate and higher education – because it's never been more obvious how much we all need each other.

We need to be less siloed, more interconnected and interdependent – across industries and also within our own organizations. We need to understand what everybody's role is in the organization and own a little part of it. If we wait until a particular need is obvious, we might be too late – the marketplace may have just passed us by.

This begins with building partnerships beyond the functions that standardization called for – rather than waiting for someone to tell me that there's an opportunity gap that I could have solved for, we each have a responsibility to look for those opportunities, anticipate the unexpected and find ways to connect the disconnected parts.

Shaden Marzouk, President of CareMore and Aspire at Anthem, one of biggest problems in healthcare is accessibility – making it more accessible and affordable to more people. Other industries have cracked this. So, when recruiting and hiring, stop relying on your traditional requirements for all of the expected experience and credentials for any particular role – those same experience and credentials that haven't been able to solve this problem yet in healthcare. Expand your idea of who could solve this problem for you and of what kinds of skills you need on your team.

"Healthcare needs people with skills in consumerism, engagement, technology that's nimble and mobile, and also people who understand socioeconomic impact, understand communities."

– Shaden Marzouk, President of CareMore and Aspire at Anthem

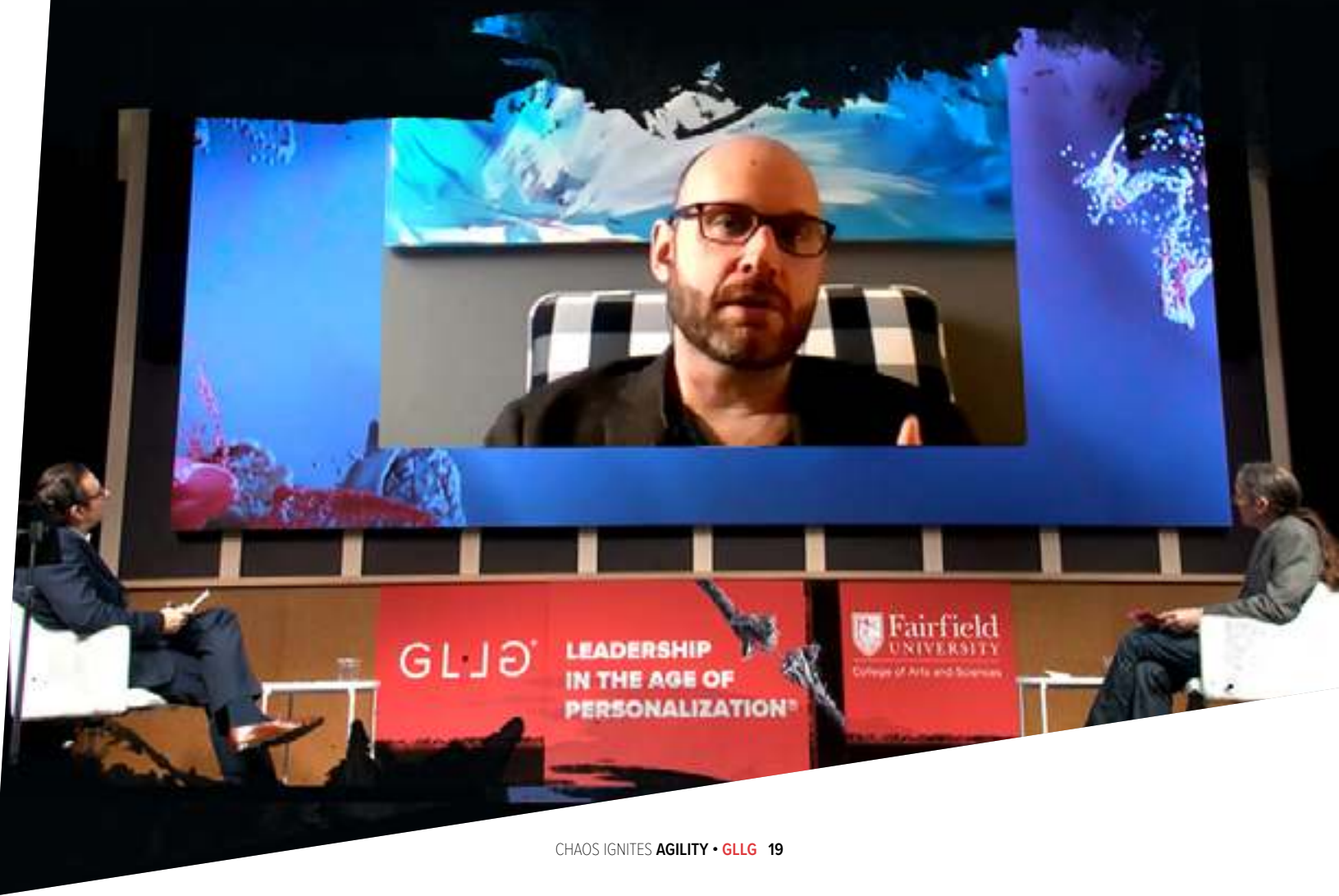
No matter our industry or sector, we all need people with skills that are perhaps not traditional to our fields. Because when we do, we begin to see beyond the obvious. We see the need to examine our metrics and methods for how we work, lead and conduct business.

One area: the performance goals we set for ourselves and for those we lead. Is it still about the goals we're responsible for within our own role or function, or more about the goals that allow individuals as we've discussed to contribute beyond their predefined silos and metrics?

"Goals have to go outside the department now.

There's a wealth of untapped knowledge that we're just not going after, because we're always prescribed to say: 'I have to build X widget, and as long as I build X widget, I'm good.' Those days are gone. If you want to accelerate your own career and really start to put your own fingerprint on it, you have to be vocal … so you can start having your goals outstretched into other areas within the company."

– Eric Miller, Vice President, Global Talent Acquisition & Operations, ViacomCBS



Bring People In

Once we've brought in those people with perspectives and experiences that differ from our own, the next challenge is making sure we give them room to actually put those unique perspectives and experiences to use.

"People can lead from any seat and we as leaders have the opportunity to cultivate that. If we allow the opportunity for our associates to be able to express themselves, it actually gives them permission to be what they want to be."

– Kristin Gwinner, Executive Vice President and Chief Human Resources Officer at Chico's FAS, Inc.

Almost everyone is holding something back:

- A good idea
- A new method
- An informed opinion
- The full extent of their abilities

Our reasons for holding back might be sound. Most often it's because we've been stifled by the status quo. But in a world where new technologies and business models can make our own products and services obsolete before we see what's coming, we can't afford to have organizations filled with people whose individual capacities are stifled in any way.

Momentum ignites when people recognize their own capacity and realize they can influence the success of the mission through their own individuality.

"The people who can put your organization on the path to sustainable growth and value creation are actually not the people who are making the decisions. People who know how the business operates and what it takes to win in the future are the entry-level folks who are so close to the business and the discipline that they are the lateral thinkers within your organization.

So if you're a C-suite executive: bring your people in."

– Nik Modi, Managing Director, RBC Capital Markets

"Transformation takes time.

It takes thought leaders. It takes inside champions. It takes people who are willing to stand up against this whole standardized approach of how we've always done things and personalize the mission and prove that it's for the betterment of the organization and for healthcare itself."

– Bob Monteverdi, Executive Healthcare Leader, Product Management, Physician & General Manager, Lenovo Health

Most leaders say they want to empower people to contribute at their fullest capacity, but they don't know how.

Standardization can't evolve without the individual stepping up. We are each responsible to recognize how standardization is limiting us, and then we are called to take action to do something about it – for ourselves and for others.

Ask Yourself

- How did your employee/customer interactions change in 2020? Should those changes be permanent?
- Now that you've got momentum in making changes: what else should you be considering?
- What stands in the way of those changes? How can leaders in other industries help you? How can you help them?

A SHARED RESPONSIBILITY

"Our Voices are our most precious tool. We must give the world a voice

That's how Harry Yeff (AKA **Reeps One**) finished his performance during the second break on Day 1. Reeps One is an award-winning artist who specializes in voice and tech-based performance. Yeff produces work spanning disciplines, contexts and media as a response to an ongoing investigation into the evolution of the human voice, art and science.

Before his vibrant vocal performance, Harry recorded a three-minute message centered on individual responsibility. He reminded us about the challenges that the pandemic has brought to all of us and how it has disrupted our notion of familiarity and elevated the importance of having a shared responsibility. He shared how his relationship with his 82-year-old father has changed during that time and how it prompted him to re-think our relationship with society: "It made me realize, if that's happening to me, the varying situations, the uniqueness of every challenge that comes with this situation, requires an equal level of unique problem solving. We all have to give ourselves the time to acknowledge that what we need is unique to each of us. And as much as we are maybe losing the ways that we would normally interact with the world, we have to gain the self-respect and the self-love that we need new solutions for care, compassion, and empathy."

sozo™ Quick Center for the Arts

Presented by @FairfieldQuick and @Sozoartists, our breaks between sessions featured artistic moments that activated and inspired. They focused on the 3Ms - music, movement and meditation - the artistic moments created bridges between the three pillars of the summit, providing purposeful bursts of energy. The curated artistic expression, led by voices from different sectors of the arts community, demonstrated how leadership, innovation and inclusivity play an inseparable role in the age of personalization.

PART 2

HOW TO LEAD THROUGH INDUSTRY TRANSFORMATION WHEN THERE'S SO MUCH UNCERTAINTY.

The Way of Dignity

When we loosen our grip on results and activate methods for leading in a way that honors our Age of Personalization, we become healthy.

When you let people break free from the standards of the past and attack challenges in their own way, you open up new possibilities. You give people their dignity back. You restore and honor their identities.

Glenn Llopis at our Leadership in the Age of Personalization 2020 Virtual Summit

How We Get There

Not ready to deliver healthcare remotely through telehealth at scale? You'll lose patients. Not ready to adapt your university's methods to be relevant for students who don't meet the traditional idea of a typical higher ed student? You'll lose students. Not ready for the evolution that digital technologies are bringing to your industry? You'll lose market share.

These are changes we've needed for a while now. The pandemic didn't create the need, but it did speed up the timeline. As we've been adapting to the challenges of 2020, our adaptations are helping us solve for challenges that existed long before Covid-19 – challenges ranging from access to medical care to access to higher education to access to transformative technologies. To confront those crises, we need to think differently as a society, but we've been slow to act.

We've learned the hard way that many leaders, organizations and industries have lost touch with the changing world around us. They spent too much time solving for the wrong opportunities, mismanaging relationships, overengineering human capital and celebrating incrementalism in the comforts of their domain.

"We teach innovation, we teach creativity, how dare we turn around and say we're not willing to do it ourselves. Shame on us."

– Nancy Hubbard, DPhil, Dean and Professor at the University of Lynchburg College of Business

But when there's urgency and when people are given the room to realize and exceed their own capacity to contribute to a shared mission – we can adapt and innovate.

To lead through industry transformation means you're exploring: What are the strategic bets we must place with urgency to remain relevant, anticipate change and lead into the future?

Recognize that Transformation is Happening: Ready or Not

Because of the restrictions of the pandemic, we've all had to adapt how we work on the fly. It's been hard, stressful and frustrating, but also a little bit freeing. Where once there were rigid protocols about how to communicate or proceed on a given project, now people are finding their own ways to make things work.

We're exercising agility by adapting to the moment. We're being experimental because we have to be. We're expanding our empathy as we learn more about the non-work lives of our colleagues and go the extra mile to help those who are feeling the health or economic impacts of Covid-19 more than others.

Throughout the summit we learned from leaders across all sectors that if you're agile, experimental and empathetic, you can adapt.

Corporate in the Age of Personalization
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"This massive disruption in process has really been a catalyst for us.

Candidly, the company was struggling. The product was a bit stale, a bit tired. We were slow to market. [During the pandemic], my job has gone from driving sales and profits, which is something I'm very comfortable doing, to ensuring that we keep everybody safe – whether it's in our offices, our distribution centers, and especially in our stores. We closed an entire retail fleet for 10 weeks and went from being an omni-channel retailer to pure ecommerce organization and learned a ton. We changed the work in our distribution centers and quickly implemented processes that made people safe, and as we reopened stores, we rebuilt the entire process around the safe customer interaction."

– Jack Schwefel, CEO, Cost Plus World Market

Some changes might have seemed counter-intuitive at first.

Telehealth and Virtual Realities
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"I always had a fascination and a cursory interest in telehealth, but I was honestly very dismissive of its application in gynecology because we are a very hands-on specialty. Of course with the pandemic we were forced to restrict in-person care. Now, when I connect with my patient virtually, I am collecting more information about her living and working conditions than I ever could in a traditional office setting. I truly believe that the realization of telehealth's utility is one of the many silver linings of this devastating pandemic. I say that because we have some significant medical crises that existed long before Covid and they're going to require a totally different way of thinking about the delivery of medical care. Personalization is definitely part of that solution."

– Dr. Terrie Thomas, Obstetrics and Gynecology Specialist with Woman's Hospital

Healthcare providers are adopting personalized care in today's digital world while large employers are adopting digital therapeutics to help their employees become more self-directed with their adherence and prevention.

It's important to create the conditions for a successful implementation of digital transformation.

"You have to plan and orchestrate your process and outline it visually and verbally to everyone around you. But the critical focus areas for success are choosing the right tools and platforms, and training, training, training. Does your staff know why they're doing what they're doing? Are they engaging the right people? That's really what my team is trying to do."

– Rich Miller-Murphy, Executive Director, Laboratory and Medical Services at New York Blood Center Enterprises

Find the Balance Between Legacy and Startup Mentality

You can work for an organization that was founded in the early 1900s, or a university based on a system that's centuries old – and find paths to reinvent yourself from both the inside out and the outside in. In an age of standardization, it was all-too-easy to rely on growth through mergers and acquisition. And that might be fine, but if that's the only model for growth, then we're neglecting to take into account the value and contribution of our own people.

"We have to solve for that immediate question of how do we offer instruction and maintain community in the midst of a pandemic, but at the same time, we can't lose sight of the fact that as a Jesuit Catholic university we are stewards of a 500-year tradition. But also we are planning for and strategizing around the next five, seven, 15, 20 years. Making sure we are addressing the moment while also not losing sight of our long-term purpose and values is absolutely essential."

– Mark Nemec, President at Fairfield University

Farmers Insurance understood that consumers don't just compare them to other insurance companies – they compare their experience with Farmers to what they experience with companies like Apple, Uber and Amazon. Farmers created its new venture, Toggle, by elevating and activating individual capacity of its own people, who found a way to let their customers define a new model for buying insurance.

"We embarked on our own transformation, but transformation for a 90-year-old company is hard and it's long. One day the CEO asked me if I wanted to take a leap of faith and create a startup within Farmers focused on building products and services for the next-generation consumer. Thus was born Toggle and a team of 13 mighty folks. We had an opportunity to do something different, but we didn't have a roadmap – and nor should we use the same playbook that got us to where we are over those 90 years. We had the freedom to carefully spend the time to innovate and think about the consumers."

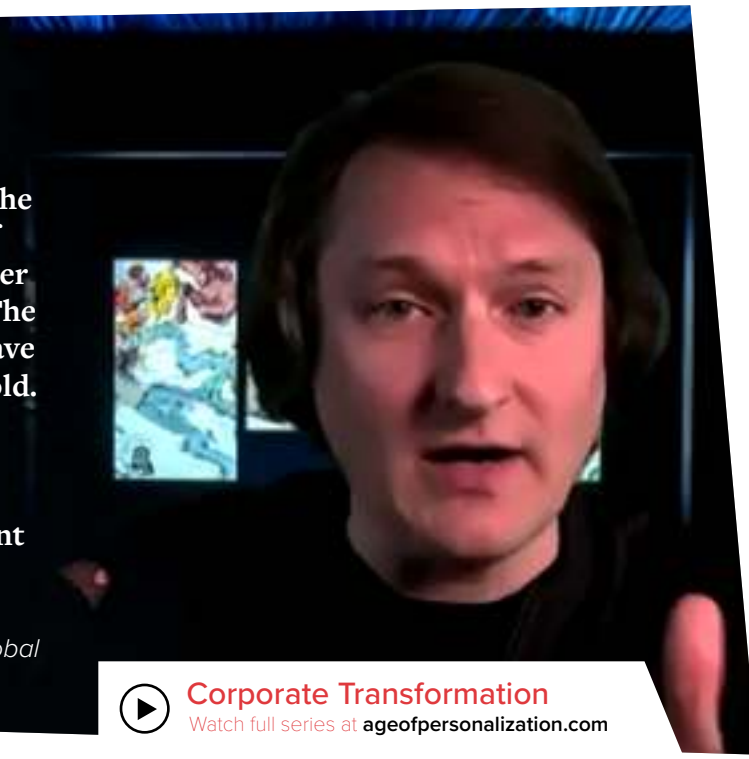
– Stephanie Lloyd, Head of New Ventures and President of Toggle and Farmers Insurance

An important element: Lloyd said she was told not to build anything on Farmers' technology systems, because as they were going through that transformation they didn't want their existing systems to be a distraction. What a feeling of freedom that must be, to be given permission to detach from a standard that might have held back progress.

Removing those obstacles can be the key to unlocking innovation.

"The ways we already do things anchor us. Every company must have a way to deal with what I call the fortress and the ship. Farmers Insurance, the 92-year-old company, that's the fortress. And, by the way, if the fortress fails, we're all in trouble. But if we only have a fortress, then eventually we're under siege and we have no supply lines and we all die. The ships – in this example that's Toggle – the ships have to be out seeking the next big thing, finding the gold. And they're not entirely sure where that is. And these are two completely different environments. They take different metrics, they take different processes and here's a key point: they take different kinds of people."

– Rob Wolcott, Co-Founder and Chairman of TWIN Global



Corporate Transformation
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It's also important to recognize that transformation disrupts people's careers. We must honor the individuals being asked to change, and give them the training and development needed to make it successful.

"The pressures within the Academy to carry on these traditions of the past are very strong and they involve people's entire lifetime of achievement and employment. We have to be mindful and respectful of that. I'm not suggesting in any way that we shouldn't make a healthy examination of what needs to change. [But] when you ask what are the leadership skills that are most needed, I would list courage, empathy, transparency, respect, resilience and innovation."

– Wendy York, Dean of Wilbur O. and Ann Powers College of Business at Clemson University

Leadership in Higher Education
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Make the Effort: Develop Your Leaders

Being able to lead amidst uncertainty is a necessary skill. Do you remember a time within your own lifetime where there was more unpredictability facing us in every aspect of our lives? As leaders of organizations large and small, we feel the weight of making decisions every day that might affect our ability to thrive in the future.

"The way we've always helped leaders change their behaviors and improve as leaders is to develop them. People have some innate talents, but somebody's got to unleash them. Somebody's got to cultivate them. Somebody's got to set the expectation. People respond to how they're rewarded."

– Annette Walker, President of City of Hope Orange County

The more we train ourselves to be agile, experimental and empathetic, the more confident we will be in our ability to make good decisions even when we don't have complete information about what the future holds.

"Nobody likes change. People are comfortable with what they know. You have people with wonderful ideas. They know change is needed, but they don't have the skills to do it themselves. So I would really urge people to do more training and development for department chairs, deans, people in senior management roles, to help them learn how to manage."

– Nancy Hubbard, DPhil, Dean and Professor at the University of Lynchburg College of Business

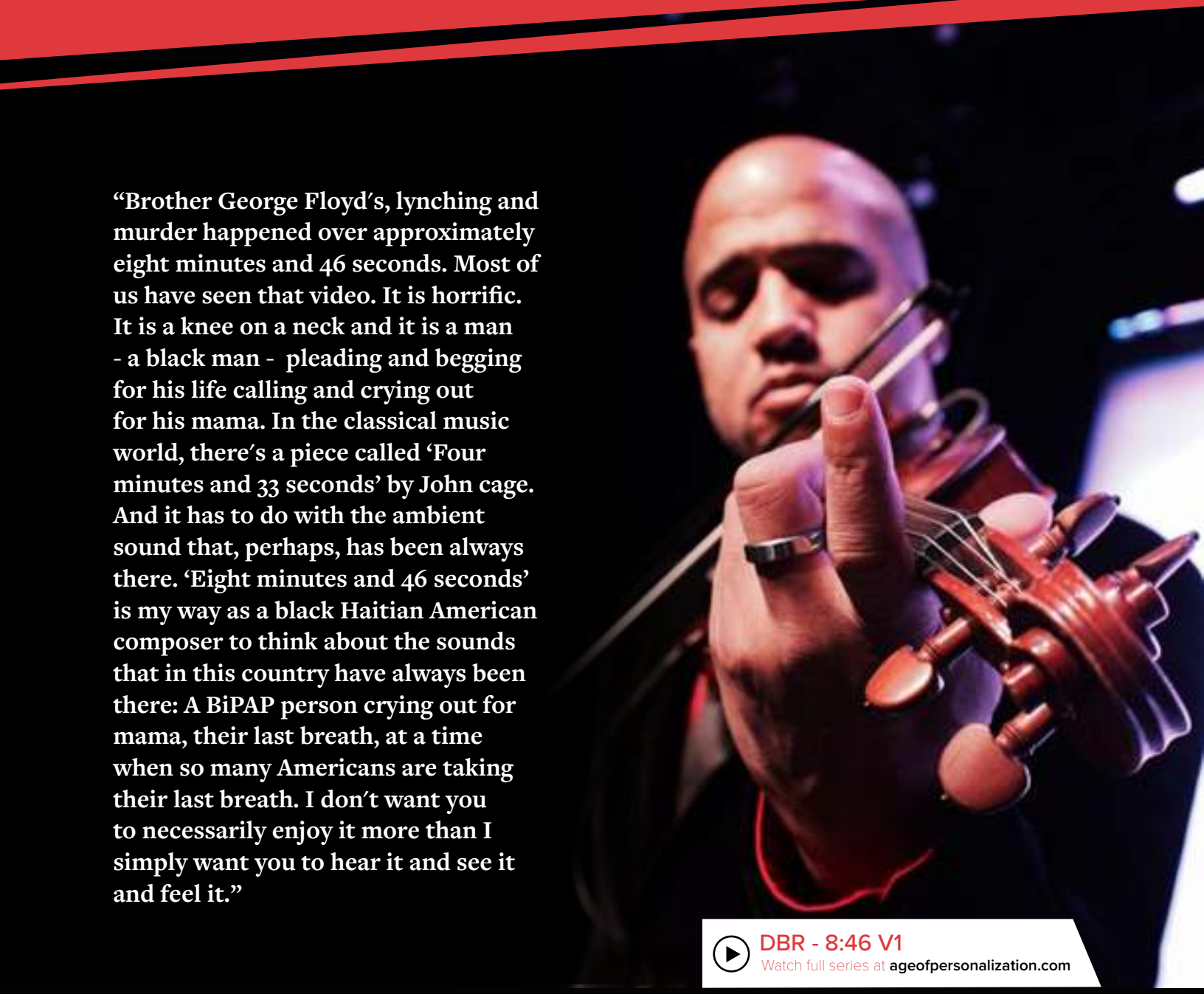
We are all in the behavior change business. We are all in the talent- and customer-retention business. We don't automatically know how to do those things. We must help each other develop as leaders.

Ask Yourself

- What changes from 2020 surprised you the most (either by being more prepared or less prepared than you expected)?
- Who do you need to partner with, to be more interconnected either inside or outside your sector?
- What outside skills or expertise do you need to incorporate, to be more prepared for the future?

EIGHT MINUTES AND 46 SECONDS

"Brother George Floyd's, lynching and murder happened over approximately eight minutes and 46 seconds. Most of us have seen that video. It is horrific. It is a knee on a neck and it is a man - a black man - pleading and begging for his life calling and crying out for his mama. In the classical music world, there's a piece called 'Four minutes and 33 seconds' by John cage. And it has to do with the ambient sound that, perhaps, has been always there. 'Eight minutes and 46 seconds' is my way as a black Haitian American composer to think about the sounds that in this country have always been there: A BiPAP person crying out for mama, their last breath, at a time when so many Americans are taking their last breath. I don't want you to necessarily enjoy it more than I simply want you to hear it and see it and feel it."



DBR - 8:46 V1
Watch full series at **ageofpersonalization.com**

Those were the worlds of Daniel Bernard Roumain's (AKA DBR) before his beautiful yet profoundly sad performance in the second day of the summit. DBR is an acclaimed composer, performer, educator, and activist known for his signature violin sounds infused with myriad electronic, urban, and African-American music influences, DBR takes his genre-bending music beyond the proscenium.

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PART 3

HOW TO PURSUE AND EMPLOY INCLUSION AS A GROWTH STRATEGY GOING FORWARD.

The Way of Dignity

When we turn diversity into inclusion, we stop being tribal and start seeing each other as human.

Inclusion is not about only acknowledging and respecting differences. Inclusion happens when we stop judging people for how they look, think and act and start taking the time to see and know who people are as humans. Inclusion is a system for making sure the organization is welcoming at every level to every individual.

Glenn Llopis at our Leadership in the Age of Personalization 2020 Virtual Summit

How We Get There

Inclusion is the most essential skill today. It requires that we constructively interrupt our auto-pilot thoughts about who belongs where, doing what. It's not just about who gets hired or promoted. It's also about how people are allowed to grow, to collaborate, to experiment, and to contribute. A culture of inclusion requires a mindset to see opportunity, anticipate the unexpected, unleash passionate pursuits, live with an entrepreneurial spirit, work with a generous purpose, and lead to leave a legacy.

Inclusion starts with recognizing the humanity in each other, and the dignity that comes when we take actions that elevate that humanity.

Think about how you view innovation. Sure, you may take a functional approach – funding a state-of-the-art innovation lab and a team of experts to explore innovative ideas full-time. There are upfront costs associated with that endeavor, but you also know that enabling true innovation will pay off over time. You likely also want an innovative spirit to permeate the organization. An enterprise that truly values innovation will want people at all levels and in all departments to learn how to be innovative.

Inclusion is no different. You might have a functional area devoted to making sure the company has systems for ensuring inclusion. That department might be seen as a cost-center. But if it's successful in creating systems that infuse inclusion throughout the enterprise, and in training everyone how to think more inclusively (just like people might be trained to think innovatively) – that's when inclusion becomes a growth strategy rather than a cost.

Why? Because the broader and more interconnected our perspectives, the more we can co-design the path forward.

But to do this correctly, we must stop controlling the individual and finally allow individual employees and consumers – whose influence is growing stronger every day – to guide the organization's growth strategies.

Inclusion is all about letting the individual touch the business, influence more and help the organization mitigate risk and neutralize uncertainty. In fact, employees and consumers often know the requirements for the business better than their own leaders and the brands (they just don't have a platform to share and express their ideas and ideals). Inclusion is about creating interdependency on people and their unique experiences and capabilities. It is about fostering environments in which leaders can best see, sow, grow and share opportunities for the betterment of a healthier whole.

How do we activate individual capacity? How do we lead through transformation when the future is unpredictable? How? With inclusion.

"You have to let people be who they are. You have to know that whatever that unique thing they bring to the table is, it's going to enhance the culture. You have to have enough safety in the culture that I can probably bring who I am and feel like that matters to the company. And that makes the company better."

– Tiffany Monroe, Chief People Officer for H&R Block

"I give a lot of credit to the Gen Zs, in terms of how they view the world. They're paving the way for all of us to respect, to tolerate, to accept people as they are."

– Gisel Ruiz, Independent Director of Vital Farms

Leadership After the Pandemic and Social Unrest
Watch full series at **ageofpersonalization.com**

Inclusion Requires Designing for Others

That can only be done once we really understand what someone else experiences, wants and needs.

"I came to medicine because I lost my mother to breast cancer and watched her die at home. I then had an accident that killed my first husband and put me in a wheelchair for three months, which changed my perspective on what matters to patients. Then as health secretary for Louisiana I was responsible for the health and safety of 4.6 million people, including preparing for storms, but also struggling with vulnerable communities to figure out how to get them what they needed. And now at LSU health, really figuring out how we educate the next generation and provide services to care. But look, the whole health care system has been organized around us. Where does the doctor want to be? Where are the four walls of our clinic? What is convenient for us? What office hours do we want to have? Not asking the patients or the community what they want. We we've anticipated our own needs. And as a result, this is a sick care system, not a healthcare system."

– Dr. Rebekah Gee, CEO of Health Care Services for LSU Health

Unpacking Personalized Care
Watch full series at **ageofpersonalization.com**

Look for ways to actively send the message: it's okay to be who you are.

Twitter addressed and dispensed with the stigma associated with having kids in the background during important meetings conducted while working from home.

"We just said, you know what, let's own that. Let's de-stigmatize it. Many of our leaders started showing up to company meetings and conversations that are more formal, and they would have their kids with them sitting on their laps – to make parents feel like it was okay to do that. We introduced Camp Twitter, because kids are going to be there anyway, let's give them something to do. And so we introduced language classes, dance classes and story time – we take 20 minutes and read a story to kids while the parents are on and doing some work. So we just tried to be empathetic to what the needs were and to be creative and find a solution for those things real time."

– Dalana Brand, VP People Experience and Head of Diversity & Inclusion, Twitter

Consider how your systems might be holding people back unnecessarily.

"We might have to get rid of a four-year program. For some students [what might be better is] a two- or three-year program focused on what they want to do, starting off with self-exploration and then moving on to skill-based learning. It's a different kind of education that might be right for some people. A liberal arts education, which I'm in love with, isn't necessarily appropriate for every student – nor is the $270,000 worth of debt appropriate for every student."

– Adlai Wertman, David C. Bohnett Professor of Social Entrepreneurship and Founding Director of Brittingham Social Enterprise Lab at the USC Marshall School of Business

"I deal with the most despicable disease on the planet, and that's cancer. And we're asking the sickest of the sick to come to us, to our buildings. That's very inefficient. There's a ton of opportunity for us to change that."

– Gyasi Chisley, President, Cancer Treatment Centers of America

Healthcare Leadership of the Future
Watch full series at **ageofpersonalization.com**

Put Technology to Use – AND Respect Its Limitations

Be creative about how to put your organization's products and services to use for good. Using technology to increase access to healthcare goes beyond bringing healthcare providers into patients' homes via telehealth to also include bringing patients to their doctors' offices via creative transportation alternatives.

"Almost 6 million Americans miss a medical appointment due to lack of transportation. Lyft has been working with healthcare organizations to improve access to care since 2016. Our goal is to eliminate transportation barriers and improve access to care for Medicaid and Medicare populations. They often cannot afford any other form of transportation. These individuals are disproportionately older, they're disproportionately lower income, they're racial and ethnic minorities. They are people struggling with multiple chronic conditions and they are people living with disabilities. And this is certainly detrimental to the health of tens of millions of people as a whole."

– Nicole Cooper is Head of Healthcare Policy at Lyft

Inclusion can also mean bringing chronic care to patients in their homes.

"[In the case of Lenovo's long-term virtual care delivery], we're trying to go with more of the chronic care than we are quickie visits – a blood pressure cuff taking your pressure and sending it off to the doctor immediately. Then if it's too high, they act on it, whether it's an assistive AI nurse saying 'Did you take your meds this morning? Did you have breakfast? You probably should have some protein.' It brings everybody along: patient involvement in their own care, physician involvement in the care, even family support in that care."

– Bob Monteverdi, Executive Healthcare Leader, Product Management, Physician & General Manager, Lenovo Health

We also can use the best parts of technology to increase everyone's voice. There's a democratization effect that technology can have, as we hold meetings online.

Higher Ed's New Virtual Reality
Watch full series at **ageofpersonalization.com**

"We all look the same to each other on video. It's no longer the case that you've got a tall person standing on a stage with the lights on them and a glorious introduction and music to usher the person on stage. There are all kinds of trappings that come with that elevation of a speaker in the sort of traditional setting. The virtual world takes most of those trappings away. As a result, there's a democratization that I think is actually a very promising aspect of this [virtual] connection."

– Nick Morgan, CEO, Public Words

But if rely on technology to solve all of our problems, we run the risk of turning technology into our next standardization hurdle.

"Universities and colleges don't only prepare students for a job. It's more than that. It's about enlarging their mental horizons. It's about learning how to learn. That's a process that requires more interaction with other human beings. That's one of the biggest challenges we have now that learning how to learn is something that is very difficult to do virtually."

– Tomas Gomez-Arias, Dean of the College of Business Administration, California State University, Stanislaus

Inclusion Starts and Ends With the Culture You Create

It's your job as a leader to **set the tone**.

Inclusion, Equity and Diversity
Watch full series at **ageofpersonalization.com**

"Culture has always been my top priority. The strategic direction of the company has been the second priority, because strategy without empathy is a wasted idea. Inclusion is a choice, you choose to be inclusive or not. For leaders, it's about doing the work to understand who you are, be unapologetic about who you are, because if you're not your authentic self, how can you expect your organization to be authentic? And how are you modeling the behaviors that you want around equity, inclusion and diversity in your organization? And I would go so far as to say if your equity, inclusion and diversity is not transforming as fast as your digital strategy, you're to blame and what is your role to change that immediately."

– Brian Garish, President at Banfield Pet Hospital

It's your job as a leader to **identify and remove barriers**.

"We often say that students come to us unprepared from our high schools and that they're not prepared for college. But we need to think about: how do we get prepared for those students? What do we need to put in place so that when those students come to us, they are successful? A first-time, full-time, low-income, first-generation student – they don't know what they don't know. So, we tell our staff and our faculty: ask students follow-up questions."

– Tyjaun Lee, Campus President, Penn Valley at Metropolitan Community College

It's your job as a leader to **make it safe for people to experiment**.

"The fear of experimentation can't be a barrier anymore, because not experimenting means we get deeper into a state of standardization and ultimately mediocrity and ultimately obsolescence. So my one hope is that you go back to your origins, go back to the passion that started you on your current path, refocus on your consumer, the patient, the student, and get inspired by others, around you in an inclusionary way to create a new way forward."

– Nik Modi, Managing Director, RBC Capital Markets

Ask Yourself

- Who do you have the hardest time including and why? What barriers are standing in your way?
- What would have to change about your organizational culture for people to feel safe experimenting?
- How might you invite people to share their experiences, wants and needs?

UNDERSTAND WHERE WE ARE STANDING IS NEW

**"Understand where we are standing is new.
The view from this moment takes breath from here.
We can see clear where right now goes next.**

For example, this is the first speech I've written since March. And from the view right here. Oh, it's quite clear. My old way of working doesn't work after all my old process included late night talks, unmasked walks, happy hour discussions at the wine bar on the block. I mean, for the last six years, my corner office was the coffee shop that I went to almost daily when I was working on a piece. But now as I walked past the medical supply store that has taken over their lease, I realized I was struggling to find a way to care the way I used to, but I don't, I don't care the way I used to my heart and soul. They work differently now.

In the old days in the modern age, nothing has set us a blaze like the computer. In fact, the computer did is so big. It didn't just change the world. It created a new world. Now we live inside two worlds, but new worlds are, they all start to say, now make maps, build roads, chart the terrain. And that's what we are doing right now.

So now we dig deeper, think faster, do better, push harder. This is how artificial intelligence makes all of us smarter, drives our collective intelligence to drive all of us farther. And that's exactly what we need right now to think about at a time when we can't go to the grocery store without a mask at a time when we need help and don't know who to ask and stay healthy is our primary task.

**Everybody's thinking about the relevance of what they do.
Not you. Because now what you do matters more.
And because now we understand how much it mattered before, understand where we are standing is new.
We can see clear where right now goes next.
We are all trying to navigate a new frontier."**

Steve Connell - Frontiers
Watch full series at **ageofpersonalization.com**

That's just a snippet of the touching performance of Steve Connell during one of the breaks. Steve is an actor, poet, motivator, & transformative entertainer whose live performances are as dynamic as the words he delivers. With private performances for President Obama, Oprah Winfrey, Maya Angelou, & Norman Lear, amongst others, his work has been seen on ABC, HBO, MTV, and performed live at Sundance, Kennedy Center, & The White House. Corporate giants like ADP, Nike, Pioneer, & Gap Inc. are among the many companies who commissioned work by Steve for his ability to create & impact with immersive multimedia performances.

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CONCLUSION

Leading with personalization does not mean abandoning standardization. It means finding the right balance, evolving our standards to empower personalization: finding the way to dignity.

This quest requires convergence.

"The discussion today has really shown the importance of symbiosis between generations, between industries, between institutions."

– Shaden Marzouk, President of CareMore and Aspire at Anthem

"I think I heard the word for inclusion today [from Shaden Marzouk], and that was symbiosis. Symbiosis is actually inclusion, because symbiosis requires not just two people working together or two things working together. It actually requires a relationship in which one cannot survive without the other."

– Scott Lacy, Associate Dean of the College of Arts and Sciences and Professor of Anthropology

Standardization in its traditional form is a model in which the organization defines the individual. Healthcare value is measured from the perspective of the organization, not the patient. Corporate value is measured from the perspective of the organization, not the employee. Higher education value is measured from the perspective of the institution, not the student.

Leading with personalization moves us toward a model in which the individual defines the business. Flip each of those previous statements around. It's a model where our individual capacities are elevated and activated so we can influence our own health decisions, so we can contribute to the shared mission and success of our companies, and so we can influence our own educational path to distinction.

During the virtual summit, we enjoyed three full days of people being courageous, vulnerable, bold, and brave enough to let their individuality shine through and to share with us how they've been meeting the challenges of 2020 as we move forward. That's the secret to evolving and building a vibrant future. It's about finding ways to elevate and activate each other's individual capacity as patients, consumers, employees and students.

It's never been more clear that all of these sectors – higher education, healthcare and the entirety of corporate America – need each other in order to survive and thrive, to renew and reinvent.

But we also have to get real. We have to free ourselves from the standardization traps of the past. We have to free ourselves individually and we have to free our organizations. There are structures and systems in place, as we've learned, that hold us back. We have to interrupt them in our pursuit of:

1. How to put patients, employees and students at the center – to activate individual capacity.
2. How to lead through industry transformation when there's so much uncertainty.
3. How to pursue and employ inclusion as a growth strategy going forward.

The way of dignity requires a mindset that moves us from the norms of success in the age of standardization to the requirements of significance in today's age of personalization.

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