

Re-imagining a CEO Leadership Summit

For more than five years, a multinational software corporation has partnered with BTS to deliver high impact experiences at scale. These engagements have ranged from coaching to leadership development, strategy alignment, and go-to-market change and transformation initiatives. Last year, the organization's leadership team asked BTS to co-create and deliver their bi-annual CEO leadership summit, which included the top 120 leaders in the company across all business units. In the past, the summit had relied heavily on PowerPoint but needed to be reimagined for today's environment, leveraging digital technology to provide an interactive learning experience.

Design of the summit

The three phases of the digitally-enabled leadership summit were designed to drive:

- **Alignment:** A unified and thorough understanding of the organization's three-year business strategy, including its financial plan, product strategy, and go-to-market strategy
- **Development:** Utilization of resources and mindset required for scale
- **Community:** Networking and teaming to solve challenges

Pulse, BTS' proprietary digital platform, was leveraged throughout the summit to provide an opportunity for the organization's leaders to collect meaningful data and crowdsource responses from the audience during presentations. Following the presentations, BTS analyzed the data and presented key insights and analytics to the CEO and executive leadership team.

The three-part summit journey

The summit was broken into three main learning phases—each phase contained its own interactive experience and respective takeaway in order to drive alignment, development, and community among the leadership team. BTS and the company's HR leadership team designed the summit experience around small team breakouts, BTS' signature learning methodology, which would immediately follow an interactive presentation from a senior leader. This structure allowed participants to internalize, debate, and align key strategic content first-hand.





Strategy made personal

The summit kicked-off with a speech from the company's Chief Financial Officer, who emphasized that becoming a cloud-first business would drive durable growth, allowing the organization to scale successfully. Following these remarks, the participants broke out into smaller groups in order to assess a variety of cloud companies and their financial performance. In doing so, these leaders pulled out meaningful conclusions about how successful businesses made the transition to cloud, as well as what metrics investors and analysts would care most about during the company's transition. The group then moved into the three-phase journey — exploring what cloud-first meant for the organization's product vision and go-to-market strategy, including its global approach.

The first phase of the event centered around aligning the organization's leaders on their new product roadmap and strategy. To begin, the Chief Product Officer presented the Roadmap and Strategy discussion exploring the capabilities and investments required for cloud and product roadmap success. Focused on an up-front prioritization of a cloud-first approach to the product roadmap, participants sought to uncover which capabilities would be required to operate as a cloud-first organization, and what might be standing in the way. To explore these questions, BTS helped co-create workshop activities which allowed participants to identify challenges and past priorities to eliminate in order to embrace the cloud.

The summit's second phase focused on driving the adoption of the organization's new strategy. The goal emphasized that everyone owns adoption, as adoption is mission-critical to deliver durable, scalable growth. During the interactive session, EVPs of Sales and Customer Success discussed the critical factors for achieving this mindset

and participated in activities focused on what each role could do to support cloud adoption. The activities included multiple brainstorming sessions as well as a visual demonstration of the "leaky bucket" analogy to explain customer acquisition and churn, and the important role it plays in successful cloud adoption.

Lastly, the third and final phase enabled the leadership team to understand the global action and investments that are required to scale and achieve 40% revenue from international markets within the next few years. During the session, HR, APAC, and EMEA leaders discussed strategy and challenges in going global as a business. Participants engaged in leader role-plays to explore "root cause" stories to demonstrate pain points from not operating globally, and then matched pain scenarios, such as customer and employee onboarding, with root causes, such as local currency, culture, and language. To drive commitment, participants then brainstormed actions and investments they can take to solve such global pain points. These actionable commitments were then tracked on BTS' Pulse platform to measure completion rates and drive long-term learning.





Conclusion

The one-day summit was an overall success. By leveraging digital capabilities, BTS equipped the organization's CEO and executive leadership team with strategic data, supplemented by observational insights, necessary for successful follow-through post-summit. Every participant left the summit committed to specific actions to drive successful cloud adoption as well as the global growth of the company's new strategy.

CEO Doug Merritt commented after the experience:

"The impact would not have been possible without the strong facilitation, flexibility, and capability of our partner BTS. You were fantastic! Your ideas and passion speak for themselves – and the stories you shared brought all to life and made it so consumable and actionable for our senior leaders."