

# PASSPORT



# FOR SUCCESS

# STRATEGIC PLANNING PROCESS THAT ALIGNS YOUR TEAM AND DEFINES SUCCESS



Insure that  
your team buys into  
the organization's  
Vision, Mission  
and Core Values

Develop and prioritize  
the organization's goals  
and develop strategies  
to reach those goals



Assign a champion  
for each initiative,  
allocate resources,  
and determine  
timelines

Trust is the glue of life. It's the most effective ingredient  
in effective communication. It's the foundation principle  
that holds all relationships.

*Stephen Covey*



**Our Core Values**  
Integrity-Courage- Respect-Trust

**Our Mission**  
Help organizations reach their goals by embracing  
true leadership principles. Our teaching and processes  
are designed to break down barriers and transition  
cross-functional groups into TEAMS.

**Our Vision**  
Watching our clients bust through the plateaus  
that have stalled their growth while at the same time  
improving the relationships they have at work  
as well as at home.



**Scott De Long**  
**Facilitator**

**Career**

President, Simpluris, Inc.  
CEO, Wavetech Industries  
CEO, Public Access Communications

**Education**

Doctoral Candidate, Chapman University  
Masters in Leadership Development, Chapman  
Certificate, Executive Leadership, UC Berkeley  
BA, History, Brigham Young University

**Teaching**

Small Group Communications, Chapman  
Business and Professional Communications, Chapman  
Intro to Entrepreneurship, Chapman

**Board Involvement**

Chairman, American Public Communications Council  
Founding Member, APCC Services, Inc.  
Chairman, California Payphone Association  
Board Member, Telecom Recovery

# LEAD GOALS

## *We Believe*

*We believe that who you are  
is more important than what you do,  
and that people are more important  
than things.*

SIGNATURE OF BEARER / SIGNATURE DU TITULAIRE / FIRMA DEL TITULAR

# LEAD 2 GOALS

## WHY AN OFF-SITE RETREAT?

### **Can't we just block out a day and get the work we need to do done here in our conference room?**

The ability to get away from the office, the phones, the interruptions and the commotion of the office allows for a deeper connection among the group and enhances their ability to form the bonds that become a team. We have facilitated meetings both in our clients offices and off site, and the results and outcomes always are better in the offsite retreat. There is a feeling of being able to immerse deeper in the discussion when the team is outside the constraints of the office.

### **Is the retreat customizable: what material is covered? Length of time on team building as well as workshop?**

Absolutely, while there is a format we start with, each group goes through a pre-retreat process in order to customize the sessions to obtain the desired outcomes. No two groups/teams are alike and we build the content based on your stated deliverables, as well as our analysis of the pre-retreat surveys and interviews.

### **Do you guarantee the outcomes? To take this time and expense, we need it to be productive, what is your guarantee?**

We guarantee the experience, what this means is that we will work towards the goal of the stated outcomes, and it is not always possible to deliver those, but what will be delivered by the end of the sessions is a process in order to get to where you need to be. Your team will have the tools, and we believe the mindset to get where you need to go. This process does not end when the retreat ends, the exercises we work through will get your group to become a team, which is a group with a shared vision and tools to obtain that vision.

## TESTIMONIALS

"Keeping nine people, who are used to being in charge, focused, productive and on point is no easy task but Scott has been able to do it and do it well. He has come to our sessions fully prepared in order that we get to work right away and get the most value out of the time spent together. Scott was especially masterful in making sure we had a good mix of activities and exercises so that participants did not burn out... mentally or emotionally."

*- Mike Dieveney, Manufacturing Solutions*

"The approach [Scott] took with us was exactly what we needed to dive deep into the issues we were facing. Our group bonded more in those three days than we had in the previous two years. It was a great experience, so great that in fact we have asked Scott back for 4 years in a row now, and each year he finds a way to get just a bit more out of us."

*- Chad Webster, Renhill Staffing*

"Being how open we are during these events, it can be challenging to immediately speak up freely about your personal and business life. Scott has the natural ability to make someone feel comfortable to do so without forming judgment or being critical, and instead giving one the tools to improve on many issues one has or even to find opportunities to better oneself in ones personal life or career. He speaks from experience in his professional and personal life."

*- Carlos Longoria, Gonzalez Longoria*



## SAMPLE 5-DAY EXOTIC STRATEGIC PLANNING RETREAT

### DAY 1

Arrival; settle into rooms  
Opening Session - establish purpose, process  
Sunset Happy Hour  
Dinner on the beach

### DAY 2

Breakfast; SWOT analysis  
Vision - Mission - Values  
Lunch  
Strategic Planning/Establishing Goals  
Zip-lining  
Relax, shower, dinner

### DAY 3

Breakfast; Review Goals  
Form groups to work on strategy  
Lunch; large group discussion on strategies  
Into groups for action plans  
Sunset catamaran cruise

### DAY 4

White water rafting (all day activity)

### DAY 5

Working breakfast  
Review plans & communication process  
Departure to airport



Leadership is a way of thinking, a way of acting and, most importantly, a way of communicating.

*Simon Sinek*

*Visas*

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*Visas*



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Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work.  
And the only way to do great work is to love what you do. If you haven't found it yet, keep looking.  
Don't settle. As with all matters of the heart, you'll know when you find it.

*Steve Jobs*

*Visas*





Leadership is a potent combination of strategy and character. But if you must be without one, be without the strategy.

*Norman Schwarzkopf*

*Visas*



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*Visas*

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Vulnerability is about showing up and being seen. It's tough to do that when we're terrified about what people might see or think.

*Brene Brown*

*Visas*

*Visas*

LOS ANGELES INTERNATIONAL AIRPORT  
★ ARRIVED ★  
20 JULY 2019  
LAGUNA BEACH  
★ USA ★

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The supreme quality for leadership is unquestionably integrity. Without it, no real success is possible, no matter whether it is on a section gang, a football field, in an army, or in an office.

*Dwight D. Eisenhower*

*Visas*

*Visas*



What we need to do is always lean into the future; when the world changes around you and when it changes against you - what used to be a tail wind is now a head wind - you have to lean into that and figure out what to do because complaining isn't a strategy.

*Jeff Bezos*

*Visas*





Mastery is great, but even that is not enough. You have to be able to change course without a bead of sweat, or remorse.

*Tom Peters*

*Visas*



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*Visas*

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Leadership contains certain elements of good management, but it requires that you inspire, that you build durable trust. For an organization to be not just good but to win, leadership means evoking participation larger than the job description, commitment deeper than any job contract's wording.

*Visas*

*Stanley A. McChrystal*



I think that's the single best piece of advice: constantly think about how you could be doing things better and questioning yourself.

*Elon Musk*

*Visas*

*Visas*





## SAMPLE AGENDA: LOCAL FORUM RETREAT

### DAY 1

Arrival night before; settle into rooms  
Opening session; establish purpose, process  
BBQ at the house

Breakfast  
Ice Breaker  
Forum health exercise  
Coaching exercise  
Lunch  
Zip lining  
Happy Hour/dinner

### DAY 2

Breakfast  
Ice Breaker  
Communications exercise  
Leadership exercise  
Lunch  
Skiing  
Happy Hour on mountain/dinner

### DAY 3

Breakfast  
Depart for homes  
Optional full day skiing



# LEAD GOALS

Our workshops and retreats create an environment that fosters deeper relationships through the understanding of others within the organization.

Whether it is Strategic Planning, Team Building or Leadership Training, our retreat workshops are customized based on the needs of your organization.

**BOOK YOUR RETREAT TODAY!**

**949.202.5763**

**WWW.LEAD2GOALS.COM**

## IMPROVE TEAMWORK THROUGH A TEAM-BUILDING RETREAT



Complete retreat experiences perfect for team building, strategic planning, leadership growth and more.

Improve team synergy and communication with intelligently planned exercises and activities designed with your business in mind



Build trust and respect within your organization

- Team Building
- Trust Development
- Conflict Management
- Corporate Culture

LEAD (2) GOALS