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Executive marketing Blueprint- BOARD rOLES

A Marketing Map for Executives and Board Members

An effective marketing plan that helps you define your goals and align your accomplishments to them

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Executive Blueprint Contents

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**This blueprint is the most important part of our service to you**. It is constructed in a marketing format that leads you through the process of contextualizing your goals, your branding, and your accomplishments. The end product of the effort is a set of BOARD DOCUMENTS strategically built to help you secure board interviews. Essentially, your blueprint is a marketing plan—built for you. It is the secret behind our ability to support your overall success.

If you have any questions as you are completing your Executive Marketing Blueprint, we are here to help. Please refer to the contact information in the welcome introduction that was sent to you via email. You are welcome to communicate with us via email or phone.

*\*\*\* We may not use all the information you give us. We will select those points that are the most important for your goals.*

BLUEPRINT COMPLETION DATE:

# CONTACT INFORMATION

* Name as you want it to appear on your documents:
* City/State/Zip:
* Phone:
* Email:
* LinkedIn URL:

\*Note from Mary Elizabeth: *Would you prefer we completely create your LI profile for Board Roles, or would you prefer enhancements which will detail your board competencies to add to your existing profile?*

# executive BACKGROUND

* What is the most P&L (profit and loss) you have ever managed?
* What is the largest number of employees you have managed?
* What is the greatest geographic oversight you have had, such as regional, national, or global?
* Are you currently employed? If not, what was the last M/Y of your employment and what was the reason for your exit?

# FUTURE GOALS

* What are your driving motivators?

**Note from Mary Elizabeth:** A driving motivator is a fixed “I have to have this no matter what” type of need. A driving motivator is NOT “working for a company where I can make a difference.” Example of driving motivators (most of my clients have 2–4 driving motivators):

*I’d like to shift from CEO to Advisor plus a few paid board roles*

*I want to establish myself as a thought leader in digital transformation.*

*…to name a few*

* What is your preferred industry? *\*Note that with board seats, most boards seek diversity of thought, culture, and experience to orchestrate a balanced board comprised of complementary skill sets and enough diversity to allow for an exchange of ideas that lead to sound decisions vs. an echo chamber. Thus, matching industries isn’t entirely necessary. What is of paramount value is that the boards you consider align with your values.*
* What is your preferred board role/committee?

• Audit Committee

• Board Development Committee

• Compensation Committee

• Cybersecurity/Data Security Committee

• Ethics Committee

• Evaluation Committee

• Events Committee

• Executive Committee

• Finance Committee

• Fundraising Committee

• Governance Committee

• Human Capital/HR Committee

• Leadership Development Committee

• Marketing Committee

• Nominating Committee

• Personnel Committee

• Product Development Committee

• Program Development Committee

• Promotion & Sales Committee

• Public Relations Committee

• Research Committee

• Risk Committee

• Steering Committee

• Strategic Planning Committee

• Technology Committee

Non-profit:

• Campaign Committee (fundraising)

• Development Committee

• Event Committee

• Outreach/Membership Committee

• Program Committee

* What is your preference for company and style (traditional/modern/virtual/trendy/flexible)?
* What size company appeals to you?

Public | Private | Non-Profit

* **In addition to Board Directorship, what other board-related actions are viable for you (consulting, advising, speaking, educating, etc.)?**

# Board-level experieince

* What boards have you sat on? Please include dates, if the board was public, private, or non-profit, title, primary focus (goals), and the committees you chaired or participated on.

Board:

Date:

Committees:

Functions:

Accomplishments:

**Board:**

**Date:**

**Committees:**

**Functions:**

**Accomplishments:**

**Board:**

**Date:**

**Committees:**

**Functions:**

**Accomplishments:**

**Board:**

**Date:**

**Committees:**

**Functions:**

**Accomplishments:**

Examples of successes/leadership triumphs and governance-type achievements:

*\*TIP: remember to keep your statements focused on a high level of strategy and governance expertise.*

* What core area of expertise do you offer the board?
* What 3 main knowledge areas do you offer a board that directly correspond to board committees?
* Do you lead or participate in any other task forces, committees, or leadership forums? If so, list them here:

[*Click here*](https://ceoresumewriter.com/2022/09/28/top-skills-boards-are-looking-for-in-2022/) *for some useful information regarding sought-after board skills in today’s market.*

# Board relations experience

*It is good to demonstrate your experience interacting with boards outside of appointments, as it evidences that you have experience working with boards on both sides of the table, which can strengthen your ability to be a good director. If you have not sat on a board yet, showing you have expertise in interacting with boards strengthens your candidacy.*

* Outside of board appointments, what board-level experience do you have? Include presenting to boards, participating on ad hoc committees, or participating in committee exercises, contributions to the overall company strategy, working with board members, creating reports, etc.:

# publications & teaching

* **Where have you been published (digital, books, white papers):**
* **What events have you spoken at? Please include keynote, topic, year, and name of association or organization you were asked to present at.**
* **Adjunct Teaching?**
* **Other?**

# awards & recognition

* **Please include the award, related company or association, and year.**

# certifications

* **Subject matter certifications (related to your industry or specialty of expertise):**
* **Leadership certifications:**

# academic

* **Please list your academic credentials:**

# other

* **Do you have any additional likes, skills, or preferences that would add to your candidacy? Ex: avid traveler, excellent with major media, and so on?**
* Do you speak any foreign languages that you would feel comfortable using for basic business conversations?

# CORE LEADERSHIP TRAITS

*90% of board issues stem from how the board is constructed or architected. Strong leadership amongst board members and the ability to have opposing views and respectful disagreement, build trust, and demonstrate a high-level ability to communicate effectively strengthen boards and reduce their overall risk. By defining your core leadership traits, you can effectively show how you can benefit the board.*

* **What core leadership traits do you offer a board? Think of the core areas that make you a great leader. These keywords can include:**

**Communication**

**Character**

**Strategic**

**Analytical**

**Diplomatic**

**Charismatic**

* **Tell us about your experience with thought leadership, innovation, and collaboration?**
* **Have you mentored any CEOs?**
* **Boards seek out leaders who can embrace change. How have you done this? Is this a strength of yours?**
* **Have you established yourself as an industry expert?**

# EMOTIONAL INTELLIGENCE (EQ), MINDFULNESS INTELLIGENCE (MQ), & ADVERSITY INTELLIGENCE (AQ)

***Your EQ and MQ demonstrate your ability to bring balance and maturity to the board. Your AQ is your grit—your ability to power through tough situations.***

**Emotional Intelligence:**

* **EQ is reflected in your ability to work with executive teams, overcome adversity, deal with pushback productively and positively, and deescalate tense situations. Speak to these issues, and if you cite examples, please mention your title/organization:**

**Mindfulness Intelligence:**

* **MQ includes how you determine to respond or present yourself in the present moment. Your sensitivity to present components affecting the people around you and how that changes or refines your approach. In other words, your real-time social skills. Briefly share your thoughts and/or examples:**

**Adversity Intelligence:**

* **AQ is all about your mental toughness and resilience displayed when facing challenging situations – in order to achieve long term goals. These traits include: self-control, facing fears, quick decision making (preferably measured against your values or the corporations values), cautious optimism, creativity, agility, striving for excellence vs. perfection, passion and perseverance, consistency and managing the fear of failing. Which traits do you possess in your leadership arsenal? To learn more about GRIT and take a complimentary test,** [**click here.**](https://www.idrlabs.com/grit/test.php)

[***Click here***](https://ceoresumewriter.com/2022/10/07/board-of-directors-intelligence-emotional-mindfulness-adversity/) ***to read further about how emotional intelligence and board seats.***

# DECISION-MAKING MINDSET QUESTIONS

***To ensure sound governance and risk management, board directors must guide consistency in decision-making despite compiling challenges and dynamic changes.***

* **How would you describe your decision-making process?**
* **How do you approach decision-making when there are many “unknowns?”**
* **When and where do you search for information to inform your decision-making?**
* **Who do you talk to when you need relevant data to make a decision?**
* **What do you do to encourage open communication and idea-sharing? Whom do you involve?**
* **In what situation would you use a macro/global perspective to make a decision, and how would you do so (compared to a micro/local viewpoint)?**
* **How do you build shareholder and stakeholder confidence in your decision-making abilities?**
* **What steps do you take to build your own confidence in your decisions?**

# branding

* Professionally, I am … *\*Tip: If you had to describe your “career self” in a sentence, what would you say?*
* When I am at my best, I affect others in the following ways:
* What I stand for, no matter what:
* What is your brand identity? What do others know and admire you for? What are you doing when you are “loving” your work? What “promised experience” will a company have when they work with you?
* What do you believe people enjoy most about working with you?
* Your Values: What are your core ethics, principles, and beliefs?
* What kinds of companies appeal to you?
* Out of all your professional endeavors, what do you enjoy doing the most?
* What types of people do you like working with?
* Fill in the blanks: You are the leader everyone turns to when they have a \_\_\_ problem or need help with \_\_\_.

# endorsements

* Board appointments and their viability often depend on perceived value and reputation. So, excellent endorsements and good marketing collateral (LinkedIn/resume) are critical. It is very important we try to get at least 3 from your mentors and colleagues. [Here is a short tip sheet](https://ceoresumewriter.com/wp-content/uploads/2022/06/How-To-Easily-Get-Endorsements-2022.pdf) on how to go about approaching that conversation.

*\*TIP: encourage your endorsees to speak about strategy and governance.*

|  |
| --- |
| TESTIMONIAL #1 |
| TESTIMONIAL #2 |
| TESTIMONIAL #3 |

# Board Roles

* Identify 1–3 board positions that match and resonate with you. You may have an existing role you have been nominated for, or you may wish to explore open roles that you are drawn to. You can simply Google “board roles” (public, private, or non-profit). Alternatively, here is a link to open board positions on LinkedIn: <https://www.linkedin.com/jobs/board-of-directors-jobs?position=1&pageNum=0>
* Highlight the keywords and phrases that you are drawn to in each opportunity you cut/paste below:

# ADDENDUM: PERSONAL BIOGRAPHY QUESTIONS

* Biography: Adding personal information to your executive biography will help engage and resonate with your audience. Clients who provide a hint of their personal lives tend to get more engagement. 1. Your family? 2. Your hobbies? 3. Travel? 4. Volunteer work? 5. Why you chose your profession? Choose 1 or 2 or all to answer. If you like golf, tell us your favorite courses, maybe your handicap, etc. If you like to travel, tell us where you like to travel and your favorite places. Providing personal details is very helpful to us to get a sense of who you are, your brand voice, and your authenticity.
* Optional: How would your mentor or a person close to you (that you admire and who inspires you) define your character in 3 words?
* Optional: Do you have a favorite quote? It can be someone else’s or your own.

# BOARD RESUME / THOUGHT LEADER / OPERATING PARTNER QUESTIONS

Below you will find a list of questions meant as a creative exercise to draw out your board strengths. You do not have to answer all of them; they are intended to encourage you to focus on the competencies and leadership traits you wish to use and brand yourself with.

* Boards tend to select members based on specific skill sets. A few examples include compensation setting, mentoring, strategy/transformations, cybersecurity expertise, industry thought leadership, and specific expertise in certain areas such as M&As, tax structure, franchises, and turnarounds. Also attractive to boards are risk management, regulatory compliance expertise, financial acumen, human capital, and ESG. A board resume focuses more on these specifics vs. your specific metrics for a company. Also, if you currently hold board seats, please provide the details on what the board counts on you to do so I may use that information to strengthen your board resume.

# Additional Board Questions: answer as many as you can

|  |  |
| --- | --- |
| What experience do you have working with or for Private Equity, Venture Capital firms, or Investment Banks? |  |
| Do you have sound knowledge of governance issues facing the board? If so, can you give some context? |  |
| Is the industry you are interested in regulated? If so, who are the regulators, and do you have any experience, knowledge, or interaction with those regulators? How well do you understand the industry? |  |
| Understanding the industry doesn’t become as important as understanding governance practices, especially when the experience of directors of the board complement one another. Say, for example, one board member was an industry expert, and another understands the regulatory side from their own industry, etc. What governance practices are you an expert in? Can you give an example of a result you achieved through your expertise in corporate governance? |  |
| Financial stewardship is important to a board role as well. The board may delegate responsibilities to committees, but at the end of the day, the board is ultimately responsible for the organization’s financial health. Tell me about your expertise in financial stewardship and your best example of it in practice. |  |
| Have you managed the organization’s risks, and do you understand the auditor’s role? Please explain. |  |
| Do you have experience both in understanding and complying with by-laws? Please give detail and include an example, if possible. |  |
| If it is a for-profit board, shareholder relations will be a very important consideration. Do you have expertise in shareholder relations? Please share the details. |  |
| What are the challenges or governance topics that interest you or that you feel qualified to do? |  |
| What do you hope to get out of a board assignment, and what do you have to offer in return? |  |
| What specific experience do you have with regulatory bodies? |  |
| Have you had any experience managing crises in an organization? What were the circumstances, what role did you have, and what was the outcome? |  |
| Do you have public relations, media relations, or analyst relations experience? In what capacity? |  |
| What unique strategic triumphs, market knowledge, operating experience, and leadership competencies do you have? |  |
| What specific experience do you bring to the table that is typically lacking in other organizations in this digital age? Do you have any expertise with digital security?https://ssl.gstatic.com/ui/v1/icons/mail/images/cleardot.gif |  |
| Do you have experience addressing CEO succession? |  |
| Do you have experience setting compensation for top management? |  |
| Do you have experience with CEO performance management? |  |
| What has prepared you for these demanding roles? What qualities of temperament do you bring to them? |  |

# EXECUTIVE EXPERIENCE (SKIP IF ON CURRENT RESUME)

**This section will draw out the foundation and background for your executive leadership experience and expertise. *Focus on your strategic and governance applications in these roles.* If possible, also link your successes to the overall company strategic plan and how you ensured its alignment through proper governance. You may add some primary overall metrics, but you do not have to go into great detail, as you would with an executive resume.**

**\*Tip: Please ADD any information asked for below that has not been provided in your original resume.** Our goal is to gain important career details **in addition** to whatever is currently in your original resume. Backstory and metrics are generally the 2 biggest components.

|  |  |
| --- | --- |
| **Position 1**  Are you currently working here? |  |
| Company Name  Company Size and a sentence about what they do, their reach, and the number of employees. Note if you work for a multi-award-winning or Fortune 50 (anything notable) company. |  |
| Company HQ  Where is the company HQ located? |  |
| Starting and Ending Dates (years) |  |
| Job Title |  |
| What were the monetary measures of your success, such as P&L, OPEX, Budget, Target Revenue, or Portfolio of Assets (Direct/Indirect)? |  |
| Were you: **RECRUITED? PROMOTED? APPOINTED?**  **If you were promoted,** what would you say was the specific achievement or aspect of your leadership that contributed most to earn you that promotion? (What did your managers or colleagues say?) **If recruited,** what was it that made you attractive to your new employer? |  |
| **What was the main challenge(s) or problem(s) you were hired to fix?** |  |
| **List 2 high-level accomplishments for each position. Focus on the main metric and your overall strategy and governance as it pertains to your role.**  Metrics can be approximate. We are striving to give your readership scale and scope over time. If possible, provide the metrics year over year. |  |

# ADDENDUM: ADD YOUR ORIGINAL RESUME

|  |
| --- |
| * Cut and paste your executive resume here. |