

DRIVING IMPACT: AN EXECUTIVE ROUNDTABLE



SALAMANDER

MIDDLEBURG



AO PEOPLE
PARTNERS

OCTOBER 27 - 29, 2025

Salamander Resort & Spa
Middleburg, VA

REAL LEADERS. REAL CONVERSATIONS. REAL TRANSFORMATION.

DRIVING IMPACT: AN AO EXECUTIVE ROUNDTABLE



REAL LEADERS. REAL CONVERSATIONS. REAL TRANSFORMATION.

Let's face it, in today's fast changing business landscape, **truly capable leaders are key** to effective strategy execution and enabling the changes needed to transform the performance, culture, and long-term value that companies seek. As AI reshapes how organizations operate and compete, executive leaders must guide their workforce through this transformation while maintaining human connection and purpose. Yet, the biggest challenge many executive leaders face is hiring and developing capable leaders who can scale not only revenue, but also culture, capability, and connection in an AI-driven world. The good news is that executive leaders can develop this ability with commitment and practical strategies.

Join AO People Partners for an exclusive 2-day executive retreat designed to inspire you and help you lead with greater clarity and impact. Alongside other accomplished leaders, you'll hear their stories about navigating transformation—including AI integration and workforce evolution—as well as the mindsets and tools that supported them. You'll also explore what it takes to build organizations where people thrive, performance scales, and purpose drives results.

WHO SHOULD ATTEND?

This roundtable is designed for **visionary leaders who are shaping the future of their organizations.** It's for those who understand that business growth and people growth must go hand in hand.

- **Founders** committed to building enduring, values-driven companies
- **CEOs** leading through complexity, scale, and transformation
- **Managing Partners** guiding firm-wide strategy and culture
- **Executive Leaders** responsible for people, performance, and purpose

If you're leading at the highest level and believe your greatest lever for impact is how you develop yourself and your people—this roundtable is for you.

This is a by-invitation-only event.
Limited seats available.

WHY THIS ROUNDTABLE?

Because effective leadership in this era requires more than decisiveness—it demands self-awareness, adaptability, and the courage to **OWN + MODEL + DRIVE** the growth you want to see in your people and your business. This retreat will give you the space to:

- ✓ Reconnect with the purpose behind your leadership.
- ✓ Learn from peers navigating the complexities of personal and business growth.
- ✓ Gain practical tools to integrate development into your business.
- ✓ Step outside your daily routine to gain a new perspective.

This isn't about abstract theory. It's about what works—in real organizations, with real results.

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October 27 – 29, 2025 | Middleburg, VA

AT-A-GLANCE

ARRIVAL (October 27)

7:00 PM - 9:00 PM: Welcome Reception

DAY 1 (October 28)

8:00 AM - 9:00 AM: Breakfast

9:00 AM - 10:30 AM: The Inner Game of Leadership: What Got You Here Won't Get You There—Mastering This Will

11:00 AM - 12:30 PM: How Executive Leaders Can Use Polarity Thinking to Lead Effectively With Both Love and Logic

12:30 PM - 1:30 PM: Lunch

1:30 PM - 3:00 PM: Why CEO Self-Development is the Secret to Unlocking Organizational Transformation

3:00 PM - 5:00 PM: Open

5:00 PM - 6:00 PM: Happy Hour

6:00 PM - 8:00 PM: Dinner + Speaker
What's Possible when CEO's Drive Human Well Being and Growth in their Company

DAY 2 (October 29)

8:00 AM - 9:00 AM: Breakfast

9:00 AM - 11:30 AM: How Executives Drive Impact Through Leadership Development

11:30 AM - 12:00 PM: Lunch To-Go

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ARRIVAL (October 27)

7:00 PM - 9:00 PM: Welcome Reception

Location: Delaplane Terrace

The roundtable begins by connecting with fellow CEOs, Founders, and Executive Leaders who share your commitment to conscious leadership and scaling impact. Enjoy drinks, heavy hors d'oeuvres, and meaningful conversations that set the tone for the days ahead.

DAY 1 (October 28)

8:00 AM – 9:00 AM: Breakfast

Location: Hamilton Parlor

9:00 AM – 12:30 PM: [OWN](#) Your Leadership Development

Location: Hamilton Boardroom

1 The Inner Game of Leadership: What Got You Here Won't Get You There—Mastering This Will

Speaker: Alex Wray and a Guest C-Suite Executive

Explore the most overlooked dimension of leadership—the inner game that shapes how we think, react, and perform under pressure. You'll hear a real-world example of how shifting mindset can unlock measurable impact at the highest levels.

2 How Executive Leaders Can Use Polarity Thinking to Lead Effectively With Both Love and Logic

Speaker: Cathy Carroll

How can leaders navigate competing tensions—not by choosing sides, but by applying a “both-and” mindset to unlock deeper clarity and reduce conflict. You'll gain practical tools to manage complexity with emotional intelligence and strategic range.

DAY 1 (continued)

12:30 - 1:30 PM: Lunch

Location: Delaplane Terrace

1:30 - 3:00 PM: **MODEL Leadership Development**

Location: Hamilton Boardroom

3

Why CEO Self-development is the secret to unlocking organizational transformation

Speaker: Mike Corkery, Ed Offterdinger + Catherine Allen

A former CEO shares how his personal leadership development journey became the catalyst for transforming his executive team and entire business. In this candid conversation, he reveals why transformation must start in the C-Suite, with senior leaders owning and modeling development to create company-wide change. You'll discover how CEO-driven leadership development becomes the foundation for scaling collaborative culture and achieving transformational business results.

3:00 - 5:00 PM: Open

Location: Salamander Resort

Enjoy the Salamander's world-class spa, trails, and surroundings—or continue meaningful conversations in smaller groups.

5:00 - 6:00 PM: Happy Hour at Red Fox Inn & Tavern

6:00 - 8:00 PM: Private Dinner + Speaker at Red Fox Inn & Tavern

Location: 2 East Washington Street, Middleburg, VA 20117
(transportation provided)

4

What's Possible when CEO's Drive Human Well Being and Growth in their Company

Speaker: Dan Simons

This candid dinner conversation explores why prioritizing mental health and human-centered leadership isn't just compassionate—it's a competitive advantage. We'll consider what becomes possible when CEOs elevate well-being and growth as core business drivers.

DAY 2 (October 29)

8:00 - 9:00 AM: Breakfast

Location: Plaines Suite Terrace

9:00 - 11:30 AM: **DRIVE Leadership Development**

Location: Plaines Suite

5

HOW EXECUTIVES DRIVE IMPACT THROUGH LEADERSHIP DEVELOPMENT

Speaker: AO People Partners

This closing session challenges executives to move beyond merely “supporting” development—to truly driving impact by embedding leadership development into the operating systems of the business. You’ll hear firsthand how senior leaders are owning and modeling development in practice, then engage in a dynamic conversation on what it takes to drive it—strategically, systemically, and at scale.

11:30 - 12:00 PM: Boxed Lunch

Location: Plaines Suite

DRIVING IMPACT: AN AO EXECUTIVE ROUNDTABLE



MONDAY, OCTOBER 27 - WEDNESDAY, OCTOBER 29, 2025

WHAT TO EXPECT

- ✓ Candid conversations with top leaders on what's working now
- ✓ Proven frameworks to scale leadership and development
- ✓ Space for reflection, connection, and real conversation
- ✓ An unforgettable setting that inspires both insight and rest

Leadership that scales starts here.

Join AO People Partners and an exclusive group of senior executives for a powerful 2-day experience designed to ignite transformation, deepen connection, and explore what it truly takes to lead with purpose and drive business results and impact.

COST + REGISTRATION

**The investment to attend the Driving Impact Executive Roundtable is
\$5,000 per participant.**

This all-inclusive fee covers:

- **Full access** to all roundtable sessions and curated experiences
- **Two nights of luxury accommodations** at the Salamander Resort & Spa
- **All meals**, a welcome reception, daily breakfast/lunch, private dinner at the Red Fox Inn
- **Access to exclusive content and tools** from AO People Partners

Step away from the day-to-day and return with renewed vision, deeper clarity, and the tools to drive impact where it matters most. **Space is limited** to ensure meaningful conversation + deep connection.

REQUEST A LINK TO REGISTER:

Camille.Chilcoat@AOPeoplePartners.com

We recommend flying into Dulles
International Airport (IAD).

[Salamander Resort & Spa](#)
[500 North Pendleton St.](#)
[Middleburg, VA 20117](#)

PROGRAM DETAILS

DAY 1

Tuesday, October 28, Morning Sessions



Alex Wray
*Master Coach +
Creator of MindShift*

THE INNER GAME OF LEADERSHIP: WHAT GOT YOU HERE WON'T GET YOU THERE - MASTERING THIS WILL

You've scaled companies, navigated crisis, built high-performing teams—and yet, the game keeps changing. Complexity is rising. Pressure is relentless. And what once worked, doesn't anymore. This session cuts through the noise and gets underneath it all. In this provocative and practical keynote, master coach and creator of MindShift, a program designed to catalyze deep transformation in how leaders think, react, and relate, Alex Wray invites executive leaders into the most overlooked dimension of leadership: the inner game. He'll be joined by a C-Suite executive who will share how his personal leadership evolution—guided by MindShift—had a transformative and measurable impact on both his presence and performance.

Why it matters: In the moments that matter most, leaders don't rise to the level of their goals—they fall to the strength of their Inner Game. That's why mindset, not models, now separates legacy-makers from the merely successful. This session reveals the invisible patterns that drive (or derail) your leadership—and how to shift them.

If you're asking, "What's next for me in my mastery path as a leader?" this is the starting line. This isn't about adding another skill. It's about rewiring the mental playbook that drives how you show up—when stakes are high and eyes are on you. Legacy is not built on what you know. It's built on who you become—when the pressure hits.

What you'll walk away with:

- A new lens for decoding your most reactive leadership habits
- Practical tools to lead with greater clarity, presence, and resilience
- A taste of the MINDSHIFT approach—field-tested, neuroscience-backed, and built for those who shoulder performance, people, and purpose

PROGRAM DETAILS (CONTINUED)



Cathy Carroll
Founder, Legacy
Onward + AO
Associate Coach

HOW EXECUTIVE LEADERS CAN USE POLARITY THINKING TO LEAD EFFECTIVELY WITH BOTH LOVE AND LOGIC

Most CEOs get trapped trying to solve false either/or dilemmas. The reality in business and in life, is that opposing realities and problems can be true. Polarity thinking reveals these aren't problems to solve but tensions to manage. Family Business Leadership Coach and author of the best-selling book: *Hug of War: How to Lead with Both Love and Logic*, Cathy Carroll specializes in helping family business leaders navigate the complexities of family business leadership. Her work centers on emotional intelligence, generational leadership, and conscious decision-making. In this interactive session, Cathy introduces the power of using polarity thinking to successfully navigate complex and competing tensions in both family and corporate business system dynamics. Using vivid real-life examples and practical tools, Cathy will demonstrate how to apply a 'both-and' perspective to illuminate opportunities not previously recognized and help decrease conflicts in family and corporate businesses.

Why it matters: The hardest problems executive leaders face often don't have clear, easy answers. Understanding the nature of polarities and how to navigate them is a critical skill for executive leaders.

What you'll walk away with: Greater awareness and practical tools to navigate and find solutions to complex business and family dynamics. You'll discover how to leverage these natural tensions as competitive advantages instead of letting them tear your organization apart.

PROGRAM DETAILS

DAY 1

Tuesday, October 28, Afternoon Session



Mike Corkery

*Former CEO, Deltek,
current Group
Executive at Roper
Technologies, Inc.*

WHY CEO SELF-DEVELOPMENT IS THE SECRET TO UNLOCKING ORGANIZATIONAL TRANSFORMATION

Personal transformation often precedes organizational transformation. As Mike Corkery, former Deltek CEO discovered, his own journey working with a coach and focusing on developing himself first became the catalyst for transforming his executive leadership team—and ultimately the entire business. This experience taught him the critical importance of personal and team accountability in leadership development and how real change begins at the top.



Ed Offterdinger

*AO People Partners
Co-Founder +
Chairman*

Why it matters: Leadership development isn't a nice-to-have—it's the foundation of business transformation. When CEOs and senior leaders prioritize their own development and model accountability for growth, they create permission for the entire organization to evolve. Mike's story demonstrates how personal leadership work becomes the cornerstone for scaling a stronger, more collaborative culture with both precision and heart.



Catherine Allen

*AO People Partners
Co-Founder +
Chief Impact Officer*

What you'll walk away with: A deeper understanding of how CEO-driven leadership development creates transformational change, the power of personal accountability in leadership growth, and what becomes possible when senior leaders own, model, and drive development as a strategic imperative throughout the organization

PROGRAM DETAILS

DAY 1

Tuesday, October 28, Evening Session



Dan Simons

*Co-Founder, Farmers
Restaurant Group*

WHAT'S POSSIBLE WHEN CEO'S DRIVE HUMAN WELL BEING AND GROWTH IN THEIR COMPANY

Dan Simons is a nationally recognized voice on human-centered leadership, psychological safety, and workplace mental health. Over dinner, Dan will lead a very candid conversation on disrupting the outdated HR playbook—and why supporting your people's well-being is not a soft skill, but a business imperative. To end the evening, AO Co-founders, Catherine Allen and Ed Offterdinger will join Dan in conversation about what's possible when business owners and CEOs elevate human-centered well-being and growth as purpose.

Why it matters: You can't drive sustainable results if your people are burning out or struggling to manage their mental health.

What you'll walk away with: A reframe on what it really means to "take care of your people"—and how leaders set the tone on mental health and wellbeing, plus bold ideas for integrating mental health and wellbeing into your company's daily operations.

PROGRAM DETAILS

DAY 2

Wednesday, October 29, Morning Session



Natasha Engan
SVP and Chief
Commercial Officer,
Deltek



Kathy Klenner
President, PNC HCM



Catherine Allen
CIO & Co-Founder,
AO People Partners



Amanda Karst
COO & Partner,
AO People Partners

HOW EXECUTIVES DRIVE IMPACT THROUGH LEADERSHIP DEVELOPMENT

Most companies say people are their greatest asset. But very few treat leadership development as a business-critical system. In this closing session, we'll explore what it really takes for executive leaders to **DRIVE** a development-centric culture—one that scales growth, performance, and human potential.

We'll start with real stories from clients who've stepped fully into owning and modeling development as a way of leading. You'll hear firsthand how their commitment at the top set in motion more clarity, alignment, and momentum across their organizations.

Then, we'll turn our attention to **DRIVE**—how executive leaders move from supporting development to scaling it with intention. Through an interactive discussion, we'll explore what's required to drive leadership development in a way that's aligned with business strategy, supported by technology, and embedded into the employee lifecycle.

Why it matters: When executives fail to drive development, it stays stuck in HR. When they commit, it becomes a multiplier.

To truly drive impact, leadership development must be treated as core to your business—not a side initiative. This session reveals what it takes to wire leadership growth into how your organization operates and performs.

What You'll Walk Away With:

- A clear roadmap for how executives can drive development across the business
- Practical strategies for integrating development with real business goals
- Firsthand client stories that bring **OWN + MODEL + DRIVE** to life
- AO's models, tools, and emerging ROI methods to help you measure what matters

OWN + MODEL + DRIVE



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