



The
Experience
Bank™

The TEB Trusted Advisor Peer Group

A Peer Group for Aspiring Non-Executive Directors, Trustees and Board Advisors. Creating a trusted network for greater client value and best practice.



Become a member

This invitation only Peer Group provides you with the business tools and resources to improve your decisions and get better results.

Connect with up to 12 like-minded leaders from a diverse range of businesses and backgrounds in your group for challenging discussions, finding broader perspectives and strategies to help drive results for clients, increase your own value and visibility, whilst enhancing your own Non-Executive skills and those around you.



Andrew Marsh

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Why join?

The Department for Business Energy & Innovation Strategy (BEIS) Productivity Review found that those businesses that adopt formal management practices are more likely to achieve higher turnover, employment and productivity growth.

Businesses that seek external advice or undertake formal training are more likely to improve their performance.

A significant part of a business's leadership and management practice comes via its board and the appointed Non-Executive Directors. However, very few businesses pro-actively invest in the development of their boards.

Evidence indicates that Peer Networks can result in **2.5% higher productivity**. Furthermore, a study performed across over 2000 businesses identified a correlation between High Performance Leadership Effectiveness and Business Performance resulting in a **2x impact on profits**. This work is documented in the book *Mastering Leadership* by Robert J. Anderson & William A. Adams (page 14).

In 2019 Vistage, the world's largest peer to peer organisation, undertook a survey on why people joined a peer group. Here are the results:

- Overwhelmed/stuck in the weeds (34%) - want to work on the business not in it.
- Isolated at the top (26%) - want to work with peers in similar positions as no real access to explore things without vested opinions.
- Energised and driven (19%) - on the right track but want to learn more and give back to others.
- Imposter syndrome/fear of failure (18%) - first NED role; first business venture; not sure what to do; relationships not on an even keel.

Your peer group offers a comprehensive method for maintaining your own skills and learning to drive business results.



Programme benefits:

- Valuable perspectives from a trusted group of peers.
- Professional guidance from an accomplished business leader and chair, Andrew Marsh.
- Deep insights from subject matter experts.
- Keep abreast of the changing role and obligations of being a Non-Executive Director.
- Have a safe place to explore issues facing you so you can identify more options, make better decisions, get better results and become a better leader.
- You will be part of The Experience Bank Peer community and will be invited to various social events and open sessions throughout the year.

By joining the group you will gain first-hand knowledge from peers who hail from a broad range of industries and disciplines. You will widen your perspective on your own organisations. The group will serve as way of developing a trusted network of business relationships and give you access to over 50 years of practical, focused knowledge that can prepare you to better anticipate the needs of your clients and be ready with proven solutions.

Our objective is to assist people who are seeking to become better advisors and leaders, make better decisions, and achieve significantly better results.

How it works

- In person 3.5 hour meeting every month, chaired by Andrew Marsh.
- Agenda set to focus on the issues facing the group.
- Each member can and should bring topics, issues, opportunities, or questions to process with the group each month.
- Speaker/SME invited along every 4 months (3 per year) to speak on topics chosen by the group.
- All members will always commit to full confidentiality.
- You will review your progress and membership on a quarterly basis with Andrew Marsh.

Is there a contract?

Simply, NO. You stay a member for as long as you are getting value, are contributing to the group and continue to pay your fees! Presented at the end of this document is a group charter that sets out the group values and behaviours to which all members must sign up.

What makes a good member?

We are seeking members that show evidence of many of these characteristics:

- Interested in growing personally and professionally.
- Interested in growing their business's top and bottom lines.
- Be life-long learners.
- Always seeking to improve their consulting and advisory skills and talents.
- Have a strong professional network and seek to tap into that more effectively.
- See a "gap" between current business situation and desired future.
- See a "gap" between current lifestyle and desired future.
- Have significant opportunities, but not sure how best to proceed.
- Experience isolation and/or not have a strong board of advisors.
- Demonstrate integrity.
- Financially sound.
- Well known & respected in their field.

Fees

The fees will be £150 per month plus VAT. Payment is quarterly in advance via BACS only and invoices will be provided. To protect the dynamic of cohorts, three months notice is required to end membership.

Programme Kick-Off

The programme kick-off session will include introductions, objectives, expectations, benefits, member charter and dates for meetings. Members will be sent Zoom calendar invites.

The Experience Bank Trusted Advisor Peer Group Charter

- A diverse, challenging, interactive group which delivers significant business growth, personal value, enjoyment and continuous personal learning and development.
- Achievement of individual business goals by contributing ideas and sharing best practice.
- Help each other achieve a healthy, fulfilling and balanced personal life.



Our 10 Promises as Members

I attend

My presence is critical, I aim for 100% attendance; to be on time and not leave early; it is my obligation to let the group know in advance of my inability to attend, not just tell Andrew.

I engage

I pay attention and ignore interruptions; I listen in order to learn; I speak in order to add value; I participate fully.

I speak up

My voice is my contribution; silence = 100% agreement; I am ready to challenge my fellow members, but in a caring, supportive way.

I share

I bring my biggest challenges, biggest opportunities and real issues to every meeting; I am open and honest.

I protect

I am committed to ensuring my group is a safe place for unbiased advice and feedback; I maintain the highest degree of confidentiality.

I am myself

I am authentic and honest; I offer real life experiences and advice from my unique vantage point.

I support

I rally to my fellow members; I care about my fellow group members; I will always ask "How have I helped the group, or someone in the group, this month?".

I act

I do not unnecessarily hesitate with the input from the group; I hold group members to account to do the things we say we want to do.

I respect

I am respectful of my fellow members and guests; I let go of judgement and am open to other points of view; I am here to help; I offer advice and experience not instruction.

I enjoy

My group is a sociable environment; I come to have fun; I take pride in my achievements of business and personal goals.

By signing below I hereby commit to the promises above, agree to pay the monthly membership fee, and to provide three months notice should I decide to leave the programme.

Name

Signed Date