

2025 Leadership Insights from Better Experiences by Design

EPISODE 25 (*December 2025*)

Narrator: Why do some companies stand out while others seem to merely show up? That's what we'll explore with leaders across multiple industries to hear how they're creating better experiences by design. And now your host, Susan Quinn.

Susan Quinn

This year. We talked a lot about disruption, AI, shifting expectations, and certainly the rapidly changing markets. But as I've reflected on the conversations we've had, one thing has become very clear. The most important elements of leadership are timeless. They don't get outdated. They don't disappear when a new technology arrives. They're evergreen things like curiosity, relevance, readiness, human connection.

So in this episode, I'm sharing the moments that capture those enduring traits. We begin with a conversation about generational relevance, about understanding how people think, how they connect, and what truly shapes their experience.

And we begin with relevance, specifically generational relevance we will explore how Gen Z and the rising Alpha generation are reshaping what leadership looks like and why the stories we create inside our organizations matter more than ever.

Here's Steve Robertson.

Susan Quinn

Let me ask you, as we get into what's after Gen Z. So you have Gen Alpha. We've gone through the alphabet, what are the things that as leaders, we need to do better to connect and make sure we don't feel like they're a bunch of aliens amongst us?

Steve Robertson

2028 is when alpha generation comes of age, gets the driver's license and starts working at Domino's Pizza. So that's a big deal. And I can tell you that the overarching shift leadership shift is a shift towards upskill, which creates a narrative. Now, upskill is where that young lady comes into your place of work and the experience that you go through, not only what she learns, but how she's deliberately laid, leads to a story of, oh, one day I walked into the founder CEO's office. We had this conversation and this and this is what happened because of it.

Those narratives change the world, and those narratives ultimately determine your culture, whether it's transformational or aspirational. We alluded to that earlier. And so when it comes to alpha generation, here's what we have to understand. Everything is about narrative. And so what we are about whether it's for Gen Z or Alpha generation, is creating narratives that change the perspective of what people have around working around coming to visit grandma, mom, granddad we changed the narrative. It can't just be a story of I'm going to visit my grandmother. There's got to be a story when I visit my grandmother, this and this and this is my experience. And experience is the narrative that then creates the culture that is now associated with you. So what I'm saying to you in a long way is this alpha generation is going to be exactly the same as Gen Z. What they will do is they will amplify the the cause driven focus more. And what we also going to see is they are going to become more siloed and more independent and more customized than we've ever experienced, because technology's amplifying so quickly. So if we can't create a culture or a narrative that they want to belong to, we won't be able to keep their attention as parents, as grandparents, as leaders, even as a business, we're moving more and more and more to the siloed On-Demand, customized world, which is going to make it harder to catch and keep people's attention.

Which means you have to understand that there is a narrative about you as a family, about you as a parent, about you as a grandparent, about you as a business. That people are going to pay attention to. And the way to create those narratives is really, honestly, through really deliberate leadership. Because when you deliberately lead people, hold them accountable, you automatically get these little narratives that form, which aren't the negative things that are the positive things, because stories coming out either way, and that's what keeps us not any future proofing in business, but it keeps us relevant to our grandchildren and to our children.

Susan Quinn

Steve reminds us that relevance isn't accidental. It's created through intention. The stories people tell about us come from how we lead, how we communicate, and how we meet them in their world. And when we think about navigating change, especially generational change, we can't only look outward. We have to be willing to look inward, to question our assumptions, to evolve our thinking, and to understand how people experience us. That deep layer of leadership is exactly where my conversation with Bill Copell begins.

Susan Quinn

You were seeing this disruption and the change of how financial advisors were serving their clients. So as you think about how you have embraced change and the transformative things that have happened, how have you been guiding advisors well, actually, any business leaders to embrace the change that needs to take place today?

Bill Copell

Nothing is forever. And we need to begin to change our focus from the now to what's coming. And so you've got to have an eye on what you're doing today, but you also have to have an eye on what's ahead. And that's probably the single hardest thing to do for businesses. So again, just to kind of put a fine point on the answer, I'm in the minority because I love change. And change to me is exciting.

And I think the challenge with human beings, generally speaking, is we don't like change. We like to live with certainty, and we don't particularly like surprises.

We are usually caught on our back foot. The way I have approached it with advisors, firm leaders, my own companies in the past has been you've got to stop and you've got to continue to reflect on who is your client, what are their needs? How are they changing, and what do we have to do to get in front of that change?

And if a company, in this case a financial advisor or financial advisory firm, is achieving some level of success about halfway up that success curve, they have to disrupt themselves. They have to start to think about what's coming next. What's on the horizon? And the way to do that is by continuously talking to your customers and understanding what it is they need and what they're facing in the challenges that they see.

We don't do that enough, and that's really the biggest reason why you see organizations grow to enormous sizes and then effectively disintegrate. Now they either got bored or they are very happy just doing okay. Okay. Could be, you know, tens of billions of dollars in revenue. So that's a hard one to argue with. But the idea of innovation, the idea of being outstanding is based, in my opinion, on your ability to continuously understand your market, understand your customer, and continuously look for ways to identify their needs, needs that they probably don't even realize.

And so the real question I've got for the financial services industry is what is your focus and who is your client? And I think that they struggle with that. I think we struggle with that in the business. We are in the relationship business and every client's interpretation of value. I suggest based on my experience is different. So a one size fits all approach is never going to be effective today. Right. And so for advisors to really begin to define their value starts with getting to know their clients at a very intimate level. Because the client's information, their story will help define the value that you can provide them. And the way you remove uncertainty from their life or minimize uncertainty. Give them a sense of direction and make them feel confident that they'll achieve what matters most starts with understanding who they are and what's important to them. And I can't emphasize that enough.

Susan Quinn

I love Bill's reminder that success can actually become its own trap, because when things are working, we may stop questioning. We may stop imagining. We may stop preparing. And in a world where clients and markets evolve quickly. Preparation is everything.

That's where my conversation with Steve Boehler comes in. Steve teaches us that opportunity doesn't go to the loudest firm. It goes to the one that's ready. Intentional and unforgettable.

Susan Quinn

It is a tough, competitive environment, and we have so many different ways to learn about different clients, different vendors. You hopefully want to be shortlisted. And then you have the pitch. You get an invitation to participate. If you are unaware that the RFP is going out, are you too late to the game, or are there many companies that really are quiet about what they need,

and then they are looking for the best people to invite to the table? What's your experience in that regard?

Steve Boehler

I think in a practical sense it's too late, and the reason I would say that is that

Bain and Company has this fascinating research about B2B purchases and big B2B business decisions and, and their research. They found that in major B2B purchases, 90% of the firms that were selected were on some kind of initial list. That makes sense. Right. And the thing that we've seen is, regardless of the industry you're in, the folks that are making a B2B purchase decision almost always have a very limited, unaided awareness of companies that could help them. They may know a couple, they may know the firm they're working with or the firm they worked with last time. And by the way, they may not have a strong point of view about those firms. And so they have a limited list. And some of the experiences they've had have probably not been great. And so there's some magic in how do you get on one of those lists? Because if you're not on the list, you're probably not in the in the game. Think of it as I've got to be ready, I've got to be memorable and I have to be findable. And if you have a plan as a firm to do those three things, you can succeed. The readiness step to us is two main pieces. It's the firm, the product, the business line. Whatever you're trying to build needs to be positioned in a compelling way. By positioned, I mean you have an idea of what your point of view is and how you're going to then express it in a number of different situations. This is more strategic than it is tactical. Yeah, the rest of the positioning is the part that makes you special and says, hey, yes, you found the right bunch to look at, but hire us because we really got the goods. We stand out for whatever reasons. We've determined that we stand out. That readiness step to us is about those two key aspects being positioned in a way that's compelling for your audience, and having the prospect friendly website that helps them advance your case without you knowing that they're ad that they're there. If your website is not just magically wonderful and expressing who you are, what you're good at, and why you are a compelling partner for them, they're going to walk away.

Susan Quinn

What I love about Steve's perspective is that he reminds us. Opportunity doesn't begin at the proposal stage. It begins long before that. In the clarity, discipline, and intentionality we bring to our positioning. And that sense of clarity is inseparable from how we think, how we explore ideas, how we question assumptions, how we spark innovation. Which brings us to someone who has spent her entire career helping leaders think differently. Here's Carla Johnson.

Susan Quinn

As I have learned throughout the decades of work that I've done, you know, you can do anything. But if there isn't a strategic component that you've asked the right questions, you're busy doing a lot of busy work. But is it actually growing your company? How do you get people to change that mindset?

Carla Johnson

I think one of the most important things that we have to bring to a strategy session that typical teams don't, is that we have to understand and agree on what is it we're trying to accomplish. And when I do strategy sessions with clients, and if that isn't agreed upon before we come into the room, unfortunately that's what most of the day is spent doing is let's agree in a line on what it is we're trying to accomplish. Now, if you go into a strategy session and you think the difference between, you know, we have a sales goal, we have a revenue goal, our strategy is how do we sell more? How do we grow the revenue of the business? That's a very, very different conversation than if you go into a strategy session and you say, how do we make our customers be better in the moments that matter? Because one is very tactical and product, and for your audience can be very service driven, like the service offerings. The other one is incredibly aspirational and inspirational.

And what the second one does by focusing on why are we here in business, is that all of a sudden, mentally and how your brain works on a creative basis, it takes away a whole lot of habitual excuses that we bring to idea sessions.

So I'm sure you've heard some things like this. Like, you know, we tried that once. It didn't work. We don't have that kind of budget. That's not how we do things around here. Like that's okay for them because they're that kind of company. But that's not the kind of company that we are. It starts to take those away. And you started to talk about a little bit about how we slide into the ideas and then automatically decide it can't be done. It shifts conversations and strategy sessions away from, no, we can't do that because to a mindset of yes, that's interesting. And another way we could think about this. And then ideas start to branch off. Because it's really easy to get into a habitual way of thinking for the sake of being productive. And I think in order to nurture our innovative thinker and our curiosity and our creativity, we have to be able to recognize and honor that. That's an inefficient process.

Susan Quinn

Carlos perspective reminds us innovation isn't a lightning bolt. It's a mindset. And it's the willingness to ask better questions, to explore the unknown, and to resist the urge to default to the same old patterns. But even when we think differently and generate better ideas, there's another piece of leadership that can hold us back. And that's confidence. Confidence in our value and our pricing and in the results we deliver.

And that's where Casey Brown comes in. Casey helps leaders break out of this fear based pricing, and to step into a value based confidence.

Susan Quinn

Well, I think we all want to be paid for what we're worth, I mean, if you are in terms of your team doing excellent work and you are investing in your team and with the hard skills and the soft skills and that your product or service is growing others or, you know, fill in the blank. But what steps can we take to begin to look at it with more confidence, to be able to be paid for what we're worth?

Casey Brown

There's so many answers to that question that I'll try to contain myself to just a couple, but I think

one pitfall I guess I see for better in class and best in class companies is that they're very focused on being best in class and better in class when it comes to their products and services.

They're vigilant and hyper focused on excellence in terms of the work they're putting out, whether it's a service or product, and they're very focused on selling and serving their customers and selling and serving and selling and serving. And you get on kind of a hamster wheel of sell and serve and the thing that gets the least focus and attention is, are we being paid well for it?

So honestly, one of the very biggest, earliest moves a company can make that suspects or knows they're not commanding the prices they really deserve is pay more attention to it.

But I would I don't want to overemphasize that, because one of the biggest misses in a lot of organizations, or our I'd say opportunities, isn't necessarily that their strategy is off track, but sometimes it's an issue of execution.

So in other words, we know what to do. We've got a good basis for our pricing strategy. We've empowered our team to go communicate and sell and defend value with customers. But there's some fear based discounting happening or some out of control under pricing that comes from a place of I don't want to lose the deal because most pricing decisions are made from fear, not confidence, and we're mostly pricing not to lose rather than pricing to win. So, while strategy is a good idea, don't forget the execution.

I think one of the cornerstones of being PayPal for your excellence is to connect what you do to something that customer deeply cares about. And I don't just mean on the logical or rational end of things, but the emotional impact of that to that person who's across the table buying from you, I would say never abdicate your opportunity to be a leader, a trusted advisor to the customer, by having a point of view about what they should do.

Susan Quinn

Casey highlights something many leaders overlook. Value isn't just financial. It's cultural. And when we lead with confidence, we reshape how our organization sees itself and how they communicate, and ultimately how they grow. That shift in mindset is the foundation for reinvention. And reinvention was the heart of my conversation with Chris Martinez. Chris took an approach to leadership that transformed not just how his firm marketed itself, but how it thought and acted and showed up in the marketplace. His story is a powerful example of what happens when creativity becomes a capability instead of a cost. Here's Chris.

So you've got a mini marketing agency internally, so not all firms do. That's right. But what you are doing, and I would say that's front and center for us. How do you tell the story, how you do it in a compelling way. What sort of things and stories are you telling? How are you creating the strategy on that? What is resonating? What is helping to grow your business?

Chris Martinez

The marketing team, had shrunken and we had an opportunity to rebuild and restructure. And I when I looked at it, I decided to take a different approach than other AEC firms. Not to say that there's a right or wrong way. I just saw an opportunity to create something very unique and dynamic, and that led us to bring in and thinking about it, almost like operating as a creative

agency that just happened to work for the landscape architecture firm. And so we started to think about the idea of storytelling and the idea of visuals that are now being seen across the board, we recruited, a friend of mine who had his own creative agency at one point, who was doing digital marketing for firms. And companies, and then we also hired, a storyteller, a writer, and so she has an ability to connect with words, which is so needed in our industry. And then we had on staff already an incredible graphic designer

who came from the magazine layout world. She's elevated, the look and feel of our brand. And so recruited around people and skill sets versus the industry standard. And that has been the most rewarding part, I think, and that's how you become better, is when somebody can show you a blind spot, when somebody can teach you a new skill, or when somebody can encourage you in something that you're great at, that's when you become to get better.

So now we have changed the conversation internally and hopefully in the industry. The marketing is not just overhead costs. It can be a profit area. It can bring in revenue. And so we have a revenue goal now for 2025 for that service.

Susan Quinn

When we elevate storytelling inside an organization, we elevate identity. And when the identity is clear, strategy becomes clear, purpose becomes clear, and leadership is crystal clear. And I think clarity is essential when we think about the future, not just the next project or the next quarter, but the future of our organization and our teams. That's where Laurie Bachman takes us. She brings a grounded, strategic lens to what it means to build a business that endures. Here's Laurie.

Susan Quinn

If you start a business from day one, you should think about the exit of that business and who will buy it. Why do some people not jump in to the planning? Is it that it's their baby and they can't imagine not being a part of it? What do you see in that regard?

Laurie Barkman

It is of utmost importance for all business owners to recognize that 100% of us are going to leave our companies one day. We all have stakeholders in our companies. We have our employees, we have our shareholders, we have our customers. And if we're not being thoughtful and having an intention for a future transition, then what's going to happen is it's going to happen to us as opposed to making it happen and making it happen on your terms. If we're not proactive about it as organizational leaders, it could have pretty big negative implications on our cultures and, and our ability to transition our processes as tools and, and get people to stay with us over a period of time longer than, you know, a year or two. But I think from a process standpoint, if you think about succession as continuity, managing risk and taking a big picture view, especially if you're a multi gen company and you want to continue in the family, it's really, really important to think about the succession of lots of things. And so I think part of recognizing the difference in those words is a mindset. And having that mindset for transition is really, really important. Like a business muscle that we should be exercising.

Susan Quinn

As I look back on these conversation and on every leader we've featured this year, a pattern emerges. Leadership evolves, but the fundamentals endure. Steve reminds us that relevance is built through narrative, through the stories people tell about their experiences with us. Bill Copell showed that adaptability requires awareness, curiosity, and the courage to actually disrupt ourselves before the world does it for us.

Steve Boehler highlighted that readiness and clarity are what put us, quote unquote, on the list. That's what makes us memorable in the moments that matter.

Carla Johnson taught us that curiosity is the engine of strategy. The better questions that you have, the better ideas you will form.

Casey Brown reframe value as a confidence practice, not a pricing exercise.

And Chris Martinez demonstrated the power of reinvention from within. Elevating storytelling, identity and purpose across an organization.

And finally, Laurie Bachman reminds us that the true measure of leadership is the future we leave behind the clarity, resilience, and continuity we build.

I will continue to accelerate. Markets will continue to shift.

But leadership, real leadership. It still comes down to how we think, how we prepare, how we connect, and how we show up.

Thank you for joining me for this best of episode of Better Experiences by Design. If any of these moments resonated with you, I hope you will revisit the full conversation and share them with someone who's committed to growing as a leader.

Until next time, here's to better experiences by design.

Narrator: Thank you for being part of our best in class community. And until next time, keep bettering your best. Narrator: Thank you for being part of our best in class community. And until next time, keep bettering your best.

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