

Monthly Newsletter

THE MCVAY REPORT

November 2025



Here's FALLING into the community...

Greetings My Tribe,

To **Live The McVay Group** means embracing our values every single day of the year. At the heart of our work is a desire to make meaningful impact in all we do.

With that, I spend a lot of time in the community, alongside clients, colleagues, and friends, who share the same passion for contribution and positive change.

This past month has been full of rich experiences. I was honored to support the "Believe" **Chrysalis** Gala for Domestic Violence Awareness & Support. The **2024 Polo Party** was a wonderful intersection of networking and celebration, while the **Women of ALPFA** provided an incredible space for professional growth and connection among inspiring women.

I also attended An Evening of Fostering Hope, showing support for AZ 1.27 foster children program, and

participated in Women & Wine of Arizona, where conversations about entrepreneurship and professional development flowed as smoothly as the wine.

Beyond events, I cherished volunteering at **Cammack Christian Academy**, spending time in the classroom and helping create fall arrangements—a reminder of the **J-O-Y** found in simple acts of service.

In the professional arena, I continue enjoying my time at ACG Arizona programs sharing time with fellow dealmakers.

Overall, I am enjoying autumn in the valley. As we head into Thanksgiving and beyond, expect more exciting events to come!

Xoxo,
Carli A. McVay

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The Power Piece: Retreat for Success

This is the perfect time to set the stage for success in 2025 with an impactful executive or board retreat. Wedding planners have “Wedding Season”; as a business coach, I have “Retreat Season.” And yes, we are deep into it!

Suit it Up: Before the clock strikes midnight on 12/31/24, ensure your team has taken a strategic pause to align on priorities, evaluate the past year’s performance, and map out actionable plans for the year ahead.

Think of it like picking out the perfect outfit or crafting an exceptional Thanksgiving dinner—everything needs to come together seamlessly to create a meaningful experience.

Sweat it Out: Be ready for 2025 before the holiday break. Allow your team to return refreshed and ready to win in the new year.

Remember, a well-executed retreat is more than just an end-of-year formality—it’s the final touch that makes your preparation complete.



Boss Moves 101: Show the Gratitude

As we embrace the “Retreat Season”, it’s the perfect time build in *gratitude* at your annual event.

- **Host a Gathering:** Organize a cocktail hour for socializing fun.
- **Give Thanks:** Recognize achievements with shout-outs.
- **Plan an Activity:** Arrange a volunteering event to give back.
- **Provide Bonus Time:** Build restoration time into the schedule.

Small gestures can show you care!



Hustler Hacks: A Must Do Agenda

Retreat Agenda with a *hustler's vibe*:

- Open with purpose.
- Review the year with candor.
- Confirm **mission, vision, and values**.
- Define **strategic destinations**.
- Set **strategic targets**.
- Determine **quarterly SMART goals**.
- Assign **owners & team members**.
- Share personal commitments.
- Close with a recap and next steps.

2025, here we come! Mic Drop!

TMG Playbook: Retreat Lovers' Guide to Winning 365



Business Coaching

Value: Guide clients through scaling growth, succession planning, and business sales, enjoying business transitions, people and client experiences, and turnkey operations as our business coaching playground.

Goal: Maximize overall business value as marked through EBITDA, revenue trends, asset values, and financial statement metrics.



Business Journey

THINK

Annual Business Strategy
(RETREAT TIME!)

MAP

Change Readiness Strategy
(POST RETREAT PLANNING)

GROW

Transition Result Strategy
(BEFORE NEW YEAR STARTS)

and then we **EXECUTE & WIN!**



Executive Coaching

Value: Empower leaders to elevate executive presence, decision-making, and team performance through a unique blend of servant leadership, solution-focused strategies, and practical strategic application.

Goal: Foster impactful, growth-oriented leadership that drives tangible results in the board room, client meetings, and office space.



Coaching Matrix

Building Leaders with Purpose

- Servant Leadership
- Executive Strategy

Leadership Levels:

- Personal Leadership
- Team Leadership
- Organizational Leadership
- External Leadership

and then we **SERVE & LEAD!**



Business Events

Value: Custom events to deliver exceptional value and create lasting impact to client organizations by incorporating our strategic planning approach into each program with meticulous care.

Goal: Ensure participants not only are highly engaged and learn content, but also practice new skills in real time, achieving desired ROI.





Sneaker Peek: Retreat Power Ups

Keeping your team involved is essential for meaningful retreats.

Use tools like flip charts and Post-it notes for engaging, hands-on activities.

Start by having team members “grade” the current year like a report card to assess successes and areas for growth. Use flip charts to brainstorm strategies and gather feedback, encouraging everyone to contribute their thoughts directly or on Post-it notes.

Wrap up with a “lightning round” where each person shares their commitment for the future.

This approach keeps energy high, strengthens team bonds, and ensures everyone is grounded and ready to step forward into the next chapter.

Suits to Sweats: My Now List

Book Club: Buy Yourself the F&cking Lillies

Coaching Book: Trillion Dollar Coach

Podcast Time: The Naked Marriage

Stress Management: Tapping with breath work

Productivity: Microsoft Planner (the bucket view)

Health Tracking: Whoop wristband & app (love)

Hair Care: Prose (my custom formula)

Bible Study: Loving Difficult People (smiling)

Time Management: Amazon, DoorDash (all things food & home delivery)

Can't Live Without: Journal (roterunner Purpose Planner ---my life)

Can't Live With: Meat, Gluten & Ideally Dairy (but I'm still human!)

Date Night: Sharing appetizers with wine

Time with Boys: Food and Football

Fall Decor: Blue and Green with Pops of Orange (keeping the TMG vibe even at home)



Thank you for being a part of the tribe!

THE MCVAY GROUP
STRATEGIC BUSINESS COACHING

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