

TOOLS FOR TOPICS

PRESENTATIONS: Most often a WHY issue, significant, unresolved and emotionally complex.

TOPICS: Often HOW, What or When. Shorter, more tactical, I would love more ideas, perspectives or experiences.



TOPICAL DISCUSSION (or Round Table)

TIME: 20 – 30 minutes

Can be scheduled or Impromptu. When scheduled, it may be helpful that members do some research or bring information with them.

Topic is in the 'middle of the table', we openly discuss and generate ideas towards the TOPIC not an individual member.

MODERATOR INSTRUCTIONS:

1. Assign someone to introduces topic and set the boundaries of the discussion.
2. Ask timekeeper to set timer for 20 min
3. Watch that everyone has a chance to speak
4. Keep the conversation on topic
5. Don't let two people 'debate' -generate ideas don't try to agree on best one.

LIGHTNING ROUND

TIME: 5 minutes

A simple question or 'poll' where a member wants to hear what everyone in the forum thinks or does about something specific. It can add speed and energy to have members stand as they speak.

LIGHTNING ROUND con't

MODERATOR INSTRUCTIONS:

1. The member asks their specific question ie. *Do you lease or buy your personal vehicles? What's a favorite vacation spot? How much 'emergency' cash do you have on hand?*
2. Go around the table, give each member up to 30 seconds to answer the question.

EXTERNAL EXPERT

TIME: ~30 minutes, 15 min. present, 15 min. Q&A

Questions arise where experience from an expert is very valuable. Identify and invite a credible expert to the meeting. A single point of contact is best, with clear expectations provided to expert.

MODERATOR INSTRUCTIONS:

1. When a topic is identified that many members are interested and a known expert is available IE: financial planning, tax planning, executive comp, child psychologist, employment law, ESOP plans, etc.
2. Contact the expert and give them specific request and timing.
3. Introduce the speaker and set a timer for 15 minutes
4. When they are finished speaking, set for another 15 minutes for Q&A
5. Moderate the Q&A if necessary, ensuring detailed or specific questions are taken offline and that the conversation keeps everyone engaged and is lively
6. Debrief, with experience share, if useful

INTERNAL EXPERT

TIME: ~30 minutes, 15 min. present, 15 min. Q&A

A member of your forum or chapter may have relevant and deep expertise to share on a specific topic. Or they may have recently learned something where sharing the knowledge with the forum is valuable many members.

MODERATOR INSTRUCTIONS:

1. Invite the member to present when prepared, either now or a future meeting (planned or impromptu)
2. When Planned, sometimes it is useful to meet at their office or site
3. Set timer for agreed to length (10-15 min)
4. Set timer again for Q&A 10 – 20 min
5. Moderate the Q&A as necessary
6. Debrief, with experience share, if useful

WRITTEN EXPERT – Book, Article, Blog

TIME: 5 - 10 minutes

When a topic is raised or a member finds a resource many in the forum would learn from.

MODERATOR INSTRUCTIONS:

1. Agree on format – one person to summarize and report or everyone to read/view and bring their thoughts
2. If a presentation by one member – max 5 minutes and then Q&A.
3. If everyone reviews, then ask each member for their big take away or questions.
4. Short video –watch together and discuss (Some materials may be online reference)

I WONDER?- BLIND WINDOW

TIME: 15 minutes

A forum member requests this when they are concerned that they may be missing something important about a decision, situation or challenge. They may request specific or general feedback.

MODERATOR INSTRUCTIONS

1. Set a timer for 5 minutes.
2. Member presents summary or key points of the situation.
3. Set timer for further 7 to 10 minutes
4. The Member turns away, with their back to the group, to listen and take notes as group 'wonders' what the member might be blind to or has not yet considered.
5. Ensure that everyone has a turn to speak (if they want to)

6. **IMPORTANT:** no judgment. Group stays in a curious and non- judgmental mindset
7. Invite the member back to the circle and thank the group for their thoughts.

HIDDEN WINDOW – I WANT TO SHARE

TIME: 10 - 15 minutes

A forum member just wants to get something off their chest. Talk it out. Tell the group without feedback, just to inform the group or to provide information that their Update isn't enough time or the appropriate place for.

MODERATOR INSTRUCTIONS

1. Set timer for what member requests or estimates they need - up to 15 minutes
2. Member speaks, uninterrupted.
3. Thank them for their story, and confirm they don't want experience sharing.
4. Check if this information is 'super confidential' or "Attila the Hun" where no one will ever raise the topic again with the member. It is 'in the vault'. If requested, the group confirms that understanding.

GOAL | ACCOUNTABILITY UPDATE

TIME: 8-10 minutes

When goal setting is part of forum, each member may report in a written format (online?) with time for challenges or celebration. Off line reporting or buddies is a best practice.

MODERATOR INSTRUCTIONS

1. Forum agrees on timing, method and accountabilities for goal reporting
2. If meeting time used, give each member equal time to report or update
3. If a member is struggling, ask if there is a presentation or other way to gain support
4. Celebrate the wins – get clear on underlying struggles

BRAINSTORMING – full page description: Brainstorming REFERENCE.