Planning

STEP 1: GUIDE

THE FORUM JOURNEY

In this step, you will learn about Forum specifics, the different types of Forums, as well as the Forum Journey--the "map" of the curriculum path for which Forum products to experience when and why--to make the most positive impact on your members and chapter.

As Forum chair, it is important that you understand and can explain the Forum types and the Forum Journey to members. A key responsibility during this year will be holding member success conversations and helping members find value in their membership through the various products and offerings. This includes sharing your own EO story, helping members know which benefits they can take advantage of immediately, as well as products and opportunities that will bring them value in the future. You will likely receive questions about Forum options beyond the chapter Forum experience or you may get requests to provide Forum to the member's Spouse/Life Partner (SLP) or Key Executive in their business.

Chapter Forum

- For local members (new members are placed by chapter Forum chair)
- Consists of monthly meetings + retreat; 8-10 members
- Managed by chapter Forum chair

Bridge Chapter Forum

- For Bridge Chapter members
- Consists of monthly virtual meetings and quarterly in-person meetings of 8 -12 members
- Managed by Bridge Forum chair

Experience Forum

- For local or regional members with Forum experience
- Meetings and members: custom (based on specific experiences, interests, life phase, industry type, time in EO or passion)
- Local experience Forums: managed by chapter Forum chair
- Regional experience Forums: created and supported by the experience Forum champion

Spouse/Life Partner Forum

- For spouses or life partners of EO members
- An SLP Forum is structured just like an EO member Forum
- Follow the same protocols as EO member Forums, including Forum Mindset (gestalt) language and confidentiality
- SLP Forum members have access to Forum training and Forum resources

Key Executive Forum

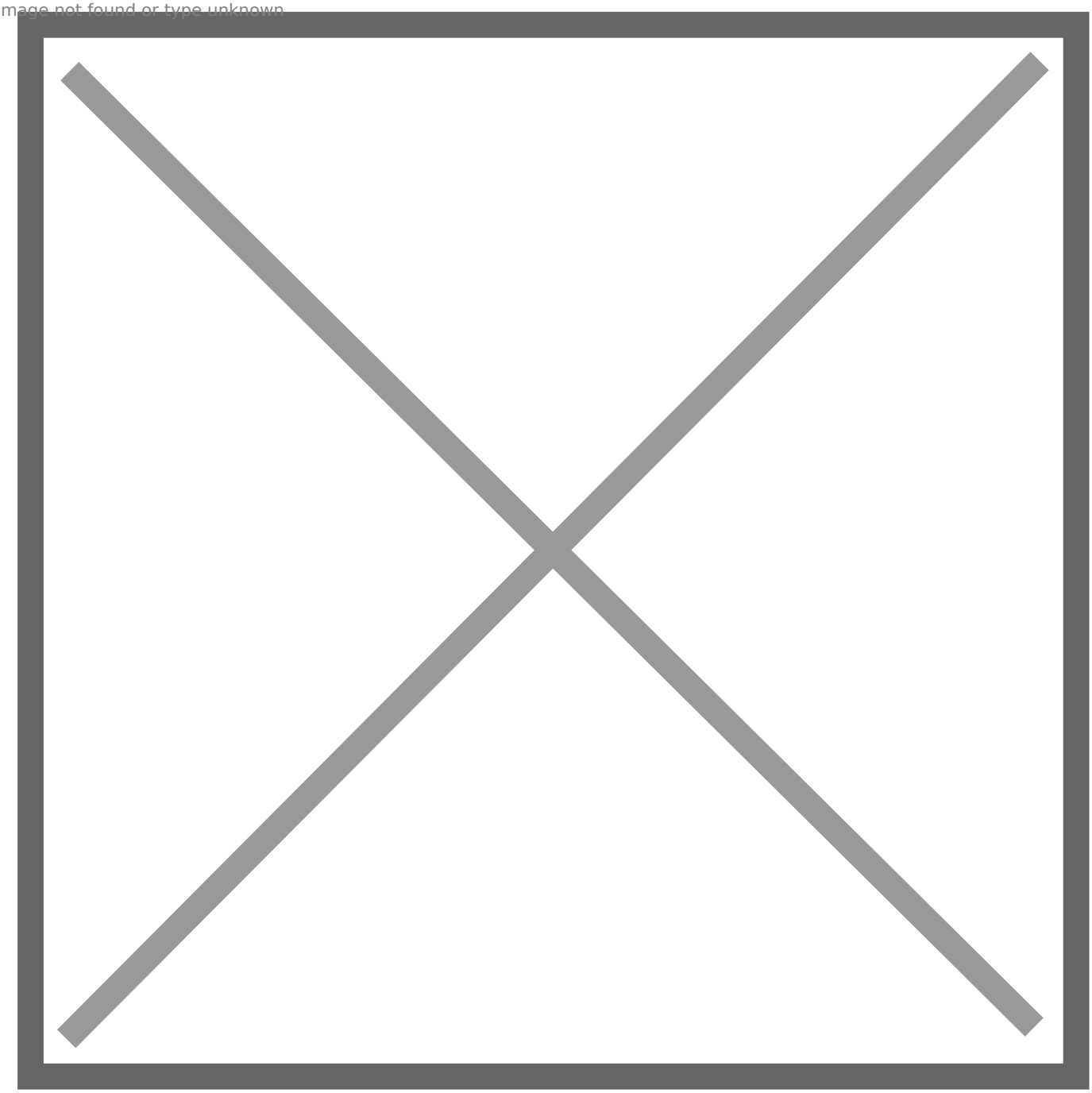
- For an EO member’s senior executive(s).
- Key Executive Forum members have access to Forum training
- Consists of monthly meetings + retreat
- 8-10 members
- Managed by the chapter Forum chair

Next-Gen Forum

- For an EO member's adult children 18-24 years of age
- Consists of the same training and Forum concepts as a member Forum
- Consists of monthly meetings (virtual or in-person)
- 8-10 members

The **Forum Framework** has evolved so every member can access an ideal Forum experience that provides unique value tailored to address their specific needs. You can learn more about how these different types of Forum offerings fit into a member's Forum journey in the photo below.

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Forum products

Different Forum products are appropriate for different points in a member's Forum Journey, as shown in the interaction above. As **Forum chair**, it is your responsibility to **communicate** these options to your members and **guide them** on their journey, so you must have a complete understanding of what is available.

Forum Training Pogram (FTP)

- The foundational product for every new member

- Full-day training provided virtually or in-person that covers Forum protocols and processes
- New members should attend training before joining a Forum
- Available for SLPs and KEP

Forum Next Level

- A one-day, advanced education workshop that builds upon the Forum Training Program foundation. The first part of the day focuses on Forum core concepts, while the afternoon puts these concepts into practice during an actual Forum meeting.
- This training will be provided once per year with updated content at no cost to the local chapter when scheduled virtually. Chapters are encouraged to schedule this training annually in alignment with one of their July-October-January-April (JOJA) intakes.
- This training can be provided in person or virtually at the chapter level or virtually across multiple chapters (regionally).

Moderator Training Program (MTP)

- A full-day training in person or virtual
- Specialized training to provide member leaders the skills necessary to be a successful moderator
- All moderators should be MTP trained before the start of their moderator role
- Offered as a full-day course or in conjunction with a Moderator Summit

Forum Health Workshops

- A half-day training with your Forum to upscale on a variety of topics and get more value in your Forum experience
  Topics include:
  Forum Essentials: increasing meeting effectiveness
  Deeper Connections: building deeper levels of trust and sharing
  Goalsetting and Accountability: defining and achieving your goals
  Forum Tools: reaching new levels of presentation and coaching
  Mastering Coaching: maximizing the impact of Forum
- Recommended yearly or bi-yearly for new or tenured Forums to gain value

Moderator Summits

- Annual event per region
- Two-day event with content and learning, socials, and Moderator Training
- Walk away with valuable tools applicable for strengthening Forum, business and family experiences
- High-value experience shown to improve chapter retention

Moderator Workshop Series

EO moderators and moderator-elects can now enjoy year-long support with continuous learning, coaching and tools. Two dedicated Forum trainers will guide the series, anchored by interactive sessions featuring theory, practical applications, breakout groups, and Q&As.

All members, SLP, key executive moderators, and moderator elects are welcome.

Resources and links:

- Bridge Forum Information Link
- SLP Forum Information Link
- Experience Forum Information Link
- *Forum Next Level 2020 - A Program Designed To Lift Your Forum Value - New & Existing Members*
- Forum Workshops
- Key Executive Forum Flyer

STEP 2: BUILD

Build Forum health

As the most highly rated EO member benefit, Forums are a source of support, camaraderie and inspiration, if they are healthy and functioning as intended. If they are not, your Forums could be in danger.

Forum Health Survey

Entrepreneurs don't always agree, but a staggering 90 percent of Forums reported a better experience after taking a Forum Health Survey.

The online tool offers several advantages over older paper surveys, including easier data gathering, assured confidentiality, the ability to compare results against external metrics and resources built into the results page that can suggest ways to increase the Forum's value.

Online Forum Health Survey: https://hub.eonetwork.org/Web/Forum/Forum-Health-Survey-.aspx

- Forum Health Survey - What To Do With The Results
  https://www.youtube.com/watch?v=r5By6OtKuc8
- Forum Health Case Study

Encourage Forum engagement

One of the ways to help improve Forum health and engagement is through an incentivizing competition such as the pursuit of a Forum Cup. By assigning "points" for participation in different Forum activities which are scored, members are incentivized, and Forum health is strengthened by this increased involvement.

Example:
For the FY2021-2022 year, EO Toronto chapter established their own Forum Olympics competition, establishing prizes for the top three Forums in each house, (1st, 2nd, and 3rd prizes,) for a total of 12 prizes given:

- 1st Place: US$5,000
- 2nd Place: US$3,500
- 3rd Place: US$1,500

Sample points-scoring opportunities include a member's spouse/life partner joining a Forum (20 points per member,) 20 points per member for attendance at chapter events, and 20 points per breakfast/lunch/dinner when their moderator attends the quarterly moderator breakfast/lunch/dinner. The Forum Olympics coach is responsible for tracking attendance and reporting it in the chapter's engage site.

What recognition or rewards will motivate Forums within your chapter?

EO Toronto Forum Olympics Flyer can be downloaded here.

STEP 3: LEAD

Quarterly moderator meetings

As Forum chair, you own the full planning and execution of moderator meetings. These meetings not only provide value to the moderators but are your chance to look for red flags and intervene with additional resources before Forum health is in jeopardy.

- Provide A LOT of VALUE
- Peer-to-peer experience sharing (make it feel like Forum)
- Should include quarterly themes around Forum health issues, best practices and Forum tools
- A place to interact and learn from other member leaders
- Discuss time-relevant chapter matters of importance
- Build confidence and skill level for moderators

As Forum chair you will attend monthly calls with your region's Forum Expert and other Forum chairs from your region. Each month will have a different Forum topic for discussion, which can be used in your moderator meetings.

Best practices:

Before the meeting

- Schedule and message all meeting dates and times at the start of the year.
- Send calendar invites so moderators have the meetings on their schedule.
- Prepare a theme for each meeting. *Examples*: planning great retreats, going deep during meetings, managing conflict, Forum logistics.

Sample three-hour meeting agenda:

30 min Meet and greet/cocktails

05 min Welcome from the Forum chairs

10 min Welcome – introductions

30 min Chapter news and updates

45 min Theme #1 for experience share

45 min Theme #2 for experience share

10 min Forum Cup updates and standings

05 min Wrap-up and One Word Close

- EO Uttar Pradesh Moderator Meeting Sample Agenda can be downloaded here
- Moderator role and responsibilities can be downloaded here

In-between meetings

- Reach out to moderators who did not attend the session
- Consider one-on-one Forum chair-moderator calls
- “What I heard (or didn’t hear) you say in our meeting…” follow-up
- Check-in as needed
- Build the relationship

Show moderators that you care and are interested in their success and that they can leverage your support.

Moderator recognition

It's important to recognize and reward moderators for the work they're doing. In addition to the suggestions given in the case study example attached, there are other ways to reward and incentivize moderators.

EO Philadelphia's current incentive program, for example, offers a $200/quarter perk for moderator attendance on 2x monthly Forum moderator video Zoom calls and 1x moderator meetings.

Seed moderator goals

When starting a new Forum, it's imperative to have the guidance and assistance of an experienced EO member with moderator training to serve as seed moderator, helping that new Forum follow best practices and thrive. In this role, they should:

- Lead by example
- Help establish Forum constitution
- Organize Forum
- Identify moderator and elect
- Start the conversation and process of planning the yearly retreat
- 5 percent vulnerability
- The Seed Moderator Playbook (available from the useful resources section below,) is a valuable tool for getting started with a new Forum. Trust the process.

Where can members apply to become a Seed Moderator?

https://bit.ly/2ZJyrUd

STEP 4: PLAN

Your chapter must have a portion of its budget allocated to Forum programs. Nearly all chapters will dedicate funds toward Forum programs, such as moderator training, quarterly moderator meetings/luncheons and Forum-placement events, Forum workshops or to subsidize Forum retreat costs. For maximum success, a chapter should invest in each Forum individually. For some chapters, this means paying for a Forum workshop for each Forum (virtual US$750). For others, it means a retreat subsidy for every Forum (US$1,000 to US$1,500). Other chapters elect to let the Forums choose how they will redeem their chapter's contribution.

Remember: Your chapter does not incur costs for new members' Forum training. Each new member pre-pays for their Forum training when they join EO!

The budget will vary based on the size of your chapter. Suggested budgets are in the chart below.

Suggested budget based on chapter size:

Many chapters budget for their Forums to participate in one of EO's Forum workshops each year. Please speak to your chapter president about an additional budget to support Forum health through these great programs!

	Small chapters (25-49 members)	Medium chapters (50-84 members)	Large chapters (85-119 members)	Mega chapters (120+ members)
Forum moderator training	US$0	US$0	US$0	US$0
Moderator Summit travel subsidies	US$3,000	US$6,000	US$6,000	US$9,000
Forum health subsidy (one subsidy per Forum for retreat facilitator or Forum workshop) (Approx. US$500 per Forum)	US$3,500	US$5,000	US$7,000	US$9,000

Other: Quarterly moderator meetings, placement events, etc.	US$2,000	US$3,000	US$4,000	US$5,000
TOTALS	US$8,500	US$14,000	US$17,000	US$23,000

Other ways for your chapter to support Forums are:

- Cover travel and accommodation costs for three to five of your moderators to attend your region's Moderator Summit.
- Host a Forum competition or Forum Cup with prize money or financial incentives awarded to the top Forum(s).

How to use the Budget Calculator Video by Laird Daubenspeck, EO Cleveland

Forum Budget Calculator can be downloaded here

The placement process

Placing a member in Forum begins with your understanding of the different variables that must be considered. This means understanding your chapter Forums: what they *want* vs what they *need*; their make-up and their health (based on Forum Health Survey) as well as understanding the new member you are placing: their business, their personality, and their expectations for what they will get out of Forum.

Post video: Forum placement - The thing we have to do first...

Step 1: Forum chair talks to the Forum moderators

- Are the Forums accepting new members, if any? How many?
- What industries are already existing in the Forums to ensure there are no conflicts? (To avoid a direct competitor coming into a Forum.)
- How are the Forum health and state of Forum to establish it as a prospective Forum? (If a Forum is not doing well, adding new members to it will add to the problems.)

Step 2: Trifecta meeting

- Forum chair communicates chapter needs for new members (industry, etc).
- Leveraging Trifecta collaboration and JOJA (July, October, January, April) intake schedule
- What type of prospective members need to be placed?
    - Industry, special needs, etc.

- Members who will ‘fit’ in the existing Forums
- Communication around what ‘FIT’ means
- Members who are aligned with EO core values
- Systematic training schedules
- Intake followed by Forum training and placement in quick succession
- No placement is permanent

Step 3: Test drive (best practice)

The membership chair, member engagement chair, and Forum chairs bring their prospective members to an event, a test drive:

- The test drive is organized by the membership chair often in conjunction with the Forum and member engagement chairs. This event is a mock Forum meeting where the potential new members experience Forum and the Trifecta chairs have a chance to evaluate the new members.
- Chapter members and the board may participate in the event.
- An actual Forum experience is facilitated.
- It helps ascertain if prospective members are aligned to the core values and it allows the new member to determine if EO is a good fit for them.

Step 4: Placement of new members into Forums

Once all the information has been gathered:

- Forum chair matches new members to Forum needs or launches a new Forum.
- Forum chair considers the feedback from current EO members, board and the chapter/Forum’s needs.
- The Forum chair notifies the moderator of the potential placement so that the moderator can verify there are no conflicts.
- A conflict can be either business or personal but must be openly and honestly communicated to the Forum chair by the member who feels there is a conflict.
- In the absence of conflicts, the new member is placed into that Forum.
- The Forum chair has the final say in the placement of a new member, taking into consideration all the factors. Keep in mind no placement is permanent.

- Forum chair follows up with moderator and new member after several months to verify the placement was successful.

Checklist:

Stick to your procedure, expect to be challenged:

- Investigate your chapter’s placement procedure in past years.
- Formalize your placement procedure (in writing).
- Involve your board and moderators.
- Communicate placement procedure with all members.

Beware of conflicts when placing new members

- Business
- Personal
- Stage of business

Does your chapter allow each Forum to establish its own placement practices?

This is not considered a best practice and can be cumbersome for you to manage while potentially extending the timeline for a new member's placement. This also can potentially create a negative experience if a new member is rejected from a group.

The most effective method of Forum placement is communication between the Forum chair and the Forum moderators. Thanks to your quarterly moderator meetings, you will know which groups are seeking new members.

Forums that have discussed the qualities they are looking for in a new member and empowered the moderator to act on their behalf can quickly get the members they need.

Collaborative placement process

The Forum chair is the sole decision-maker on Forum placement.
This requires the Forum chair to have a good understanding of the wants/needs of the Forums as well as a good understanding of the new member being placed.

Pros:

- Support diversity within Forums
- Typically a quick process, because only one person is involved in the decision-making process

- Is respectful to the new member

Launching a new Forum

Know when/how to launch new Forums, as necessary, to accommodate members. If no Forums are seeking members, but you are recruiting a group of new members at one time, consider building a new Forum with this group.

- Review the placement criteria as you would when placing a member in an existing Forum.
- All members of the new Forum should participate in Forum training together. Ensure that the Forum trainer is aware of this situation. Training can be altered to provide the group structure they will need to thrive (elect and train a moderator, establish a standard meeting agenda, begin to build their constitution, and determine an initial parking lot for presentation topics).
- New Forums should have an introductory meeting following training before they begin using the standard Forum meeting agenda.
- If necessary, the new Forum may need some guidance and help getting started with their first meeting. As Forum chair, be available to guide them or have a tenured chapter member or leader seed moderate their Forum for the first three to six meetings.

Resources:

- Forum Member Playbook can be found here.
- Updating your chapter's Forum Information click here

Bright idea: Contact your Forum expert or talk to the Forum team at EO if you're finding challenges. Two heads are always better than one!

Remember to work closely with your member engagement chair concerning placement. New members will be made aware of the benefits of Forum during the recruitment process, and that will only be reinforced as they engage with current members while considering joining EO. One way to align the efforts of recruitment with Forum is to ensure that your member integration chair is aware of the placement process and that it is communicated to new members.

Tools and resources:

- Forum Placement Process can be downloaded here
- Forum Placement - The thing we have to do first... https://www.youtube.com/watch?v=rAxsyMkv3fQ

- Forum Placement - The Best Process https://www.youtube.com/watch?v=Nd5ePHs7KHs
- Forum Placement - We aren't Cherry Farmers :) https://www.youtube.com/watch?v=_usWYpGrO-o
- Forum Placement - When a New Member Joins Your Forum https://www.youtube.com/watch?v=1bnwc9s1HN0

Trifecta

Trifecta is a partnership between **membership**, **Forum** and **member engagment** working together as a single unit to join efforts and goals, providing the best possible member value for chapters, while also creating and sharing best practices as the Trifecta.

- Identify synergies between membership, member engagement and Forum to ensure the smoothest onboarding for a new member, including the 90-day Forum placement policy
- Develop strategies to aid all members to feel connected and get maximum value from their membership
- Forums interview new members to determine the best fit

To establish the Trifecta in your chapter, you will need to agree on a process for everyone in the Trifecta to **understand each other´s goals and expectations** and plan accordingly to achieve them.

JOJA as a best practice

The standard best practice for member intake is the **JOJA** "class intake system," which is a way of bringing groups of new members into EO on specific months of a year (**J**uly, **O**ctober, **J**anuary, and **A**pril, hence JOJA). *(See diagram here)*

Having a group of new members coming into the organization at the same moment ensures a better experience because of peers going on a similar journey. However, there may be a different timeline that works for your respective chapter. Every chapter and region can adapt the timeline to work with what is the best course of action keeping in mind the 90-day placement policy.

We've created a helpful guide to planning your year and getting Forum placement right.

Trifecta Summit outcome and resources

The Trifecta Summit is an opportunity for members of the Trifecta –membership chair, Forum and member engagement chair – to come together to share experiences and best practices/what is

working in terms of Forum placement, planning and how to best work together.

Primary outcomes from the summit:

- Identify a Trifecta chair/ champion
- Create a written plan for the Trifecta to maximize retention
- Standardize an onboarding process for your chapter:
  - A Trifecta plan with dates of intakes/recruitment/placement
    # of members needed and in which Forums
  - Trifecta meeting agendas/frequency
  - Budget and Samepage sharing platform
- Create legacy documents for harmonizing succession planning

Tools and resources:

- Trifecta Case Study, can be downloaded here
- The Trifecta - What Is It and Why Does It Make Your Job Easier? https://www.youtube.com/watch?v=xnQzn34goq4&t=86s
- The Trifecta Summit Explanation #1 - New Initiative https://www.youtube.com/watch?v=EcSzpCxA0Fk
- Trifecta Summit - Who Goes & What Do They Get? - South AUSTRALIA Trifecta Summit https://www.youtube.com/watch?v=Q4ONm4nPGbk
- Ep1 Trifecta Series - What Is Trifecta & Why Is It Important https://www.youtube.com/watch?v=AYXkirPnzak&t=2s
- Ep 2 Trifecta Series - What Are The Expectations Of The Different Parts Of EO? https://www.youtube.com/watch?v=RwL8nCXz6rg
- Ep 3 Trifecta Series- How Can The Trifecta Meet The Expectations of The Different Groups Of EO? https://www.youtube.com/watch?v=XKYN4dEdu90
- Ep 4 Trifecta Series- What Does Each chair of The Trifecta Need From The Other Trifecta chairs? https://www.youtube.com/watch?v=AaZ3Pdz2eVg
- Ep 5 - Trifecta Series - What Does A Trifecta Meeting Look Like? https://www.youtube.com/watch?v=F-LNN_zR-jo
- Ep 6 - Trifecta Series - New Member Journey Tips For Success https://www.youtube.com/watch?v=Bha5ufYE1p4
- Ep 7 Trifecta Series - How Do You Know If A Member Is Happy With Their Membership? https://www.youtube.com/watch?v=tYypVP_WMkA

Forum Chair Action Plan

Planning is key to your success as Forum chair. Utilizing a 90-day approach, you can gather the information you need to create and share your plan, and schedule meetings and trainings.

The 90-day plan to set yourself up for success as Forum chair consists of:

Preparing (May) in the first 30 days (gathering information on Forum health, meeting with outgoing chair and the Trifecta);

- Meet with outgoing Forum chair
- Meet with Trifecta (member engagement and membership chair)
- Gather Forum information: names, facts and figures
- Identify/understand red flags

Review your chapter's Forum report: By accessing the Forum report, you can review the placement and training status for every member in your chapter.

Access your chapter's Forum report here

You must then ensure new members are Forum-placed within the first 90 days and documented online.

As you review your chapter's Forum report, answer the following:

Do I have members who:

- Require placement?
- Need training? If yes, are there enough untrained members (minimum of six) to schedule a Forum Training program (FTP)?
- Are any members not participating in Forum? If members are voluntarily choosing to opt-out of Forum, please indicate that on your chapter's Forum report.
- Does the Forum report represent the current chapter Forum roster?

And how about moderators?

- Are the moderator names up to date for each Forum? (Including Spousal/Life Partner Forum?)
- Do you know when these Forums will change moderators and the names of the incoming moderators?
- How many of the moderators are trained?

Forum policies and procedures

After reviewing your chapter's current Forum policies and procedures, and meeting with the outgoing Forum chair, you should discuss the following with your chapter's board and/or president:

- Available budget to support Forum moderator training, Forum workshops, Forum health, and incentives in the chapter.
- How often new members are recruited.
- How quickly members are trained and placed in Forums.
- How members are placed within individual Forums.
- How EO manages members leaving a Forum.

Planning (June) in the next 30 days (establishing moderator and placement plans, planning a training schedule and budget).

Make your plan:

- Goals
- Moderator plan
- Placement plan
- Schedule Forum training
- Budget planning
- Forum events
- Secure budget
- Schedule moderator meetings

Organizing (July) in the subsequent 30 days (scheduling moderator meetings, scheduling training, setting up document sharing, and sharing your plans with other FCs).

(Check each item as you read them)

- Schedule FTP and MTP trainings
- Setup document sharing app
- Get in touch with moderators
- Share the plan with regional FCs

Be ready for anything. There is no way to plan for crises and they will occur. Managing a Forum crisis can be one of the most challenging and rewarding situations a Forum chair will face.

START HERE

Here’s a checklist to guide you through the different actions you need to complete your role.

Q1: July, August, September

- Prepare Forum report from the EO Hub
- Present Forum report, training dates, and action plan to board for approval
- Propose changes to chapter Forum policies as needed
- Hold Q1 moderator meeting
- Attend chapter board meetings
- Attend your Forum expert's monthly calls
- Train new members and place them into Forums within 90 days of joining
- Schedule visits with each Forum
- Introduce yourself, offer contact information
- Encourage Forum constitution
- Discuss Forum products
- Guide them to the EO site for best practices
- Find out who is the current and incoming moderator; be sure your current moderators are correctly reported on the EO Hub

Q2: October, November, December

- Attend chapter board meetings
- Attend your Forum expert's monthly calls
- Train new members and place them into Forums within 90 days of joining
- Continue visits with each Forum (if not complete)
- Hold Q2 moderator meeting

Q3: January, February, March

- Identify your successor
- Train new members and place them into Forums within 90 days of joining
- Attend chapter board meetings
- Attend your Forum expert's monthly calls
- Hold Q3 moderator meeting
- Begin working with Forums to identify moderators-elect for each Forum
- Be sure new moderators are trained before the start of their term

Q4: April, May, June

- Attend chapter board meetings
- Attend your Forum expert's monthly calls

- Train new members and place them into Forums within 90 days of joining
- Hold Q4 moderator meeting
- Meet with incoming Forum chair to help transition; be sure they are registered for GLC!

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