



# Forum Retreat

Exercise guide



# Table of Contents

## Core Values

**TRUST AND RESPECT**

**THIRST FOR LEARNING**

**THINK BIG, BE BOLD**

**GROW TOGETHER**

<b>Creating powerful retreats</b>	<b>3</b>
<b>Conflict conversation guide</b>	<b>5</b>
<b>Moderator tips</b>	<b>6</b>
<b>Exercises</b>	
Icebreakers	7
Deeper connections	27
Self-reflection	41
Forum meeting tools	55
Business tools and understanding	109

## Acknowledgments

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Over the years, many people have contributed to the ideas and concepts contained in this workbook and the training program in general. These people have given of their time freely in order that we might all enjoy a better Forum experience. Your Forum experience is richer for the knowledge they have shared.

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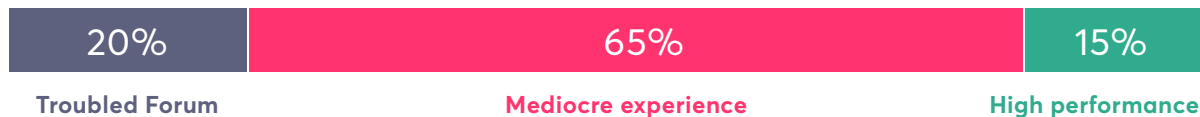
# Creating powerful retreats

## THE WHY

### Why are you going on retreat?

#### 1. Assess your Forum. Where are we right now as a Forum?

a. Assess Forum health: get quantitative (survey) and qualitative (members' candid thoughts) data.



#### 2. Why are we going on this retreat? What do we want or need to accomplish?

3. **Develop a retreat theme/goal.** This positions you to make decisions to help the group move out of their comfort zone. A few examples of themes you might consider include: Rejuvenation, forging deeper relationships, personal growth, transitions, envisioning our future and more.

### The physical environment

- Work to create the "summer camp" feeling. Think of communal living, a beach home or cottage vs an all-inclusive resort atmosphere.
- Be close to nature or —if in the city— find and embrace urban beauty.
- Do your group work in a good "living room space," with lots of natural light and windows vs a hotel meeting room.

### Shift from left brain to right brain

- Create a non-meeting room setting or environment.
- Awaken the creative emotional brain with a meditation, fun or artistic exercise.
- Movement, music, art, poetry.

### Balance: 1/3, 1/3, 1/3

- One-third group development work (prepared exercises/activities).
- One-third group activity (hiking, zip-lining, boating).
- One-third unstructured social time (preparing meals together, sitting around a fire).

### The retreat as a fully integrated experience

#### You need a beginning, middle and end.

- Beginning: The opening session is for shifting gears, each member sharing their intention for the retreat, a warm-up (1-2 hours)
- Middle: Group development work should move toward a peak of emotional intensity in the middle of the retreat (4-8 hours over 1-2 days)
- End: The closing session is a time for appreciations, making commitments to doing things differently and to savour what you just experienced together.

# Creating powerful retreats

## Retreat pitfalls

These things will diminish your retreat experience:

- 1. Loss of balance:**
  - a. All play – the group will feel the lack of substance.
  - b. All work – the group will leave feeling exhausted and cheated out of the location.
  - c. Over-structured down time – creativity and spontaneity will be stifled.
- 2. Allowing too many individual entry and exit points for individual members.**
- 3. Fragmentation—unregulated electronics access, breaks where members do different things.**
- 4. Poor location and space choice:**
  - a. Little to no connection with nature.
  - b. Hotel meeting room (too much like monthly meetings).
  - c. Separate hotel sleeping rooms where members disappear into their own worlds, via electronics, after hours.
- 5. One member facilitates the retreat. This member either loses their opportunity to participate as a member or manages to do both, but ends up exhausted.**

## Qualities of a powerful retreat

1. The group has a powerful, emotional and moving experience.
2. An individual member has a life-changing “a-ha” new insight.
3. The group challenges itself to participate in an activity together that takes them out of their comfort zone, then talks about what they experienced.
4. Every member moves from a protective-ego stance to an unguarded, open, vulnerable stance.
5. Group members leave having learned something about each other, their Forum, themselves and their theme topic.

## Choosing to engage a professional facilitator

You will maximize your retreat experience by engaging a professional facilitator. Forum best practice is to work with a professional facilitator at least every second year.

### What skills does a professional facilitator bring?

- Expertise, creativity and customization in designing your retreat activities.
- A professional facilitator frees all members to fully participate in the group development work as members.
- A neutral, external, trained “set of eyes” to watch you work as a group. A facilitator is able to recognize group and individual dynamics and how these are affecting the group. They are capable of raising the group's awareness and changing patterns that are negatively impacting the Forum.
- A facilitator has the skills to help members open up and share more deeply than ever before.
- Facilitators are experienced in handling moments of intense emotion within a group (whether this is occurring due to disclosure or addressing a conflict). Facilitators can be a stable presence helping the group engage fully in these important moments, to resolve them and to learn from them.

## Conclusion

Your annual retreat will be one of the most significant events of the year for the Forum. As Moderator, you should not take on the role of planning the retreat. But rather provide oversight and support to the retreat planners. Invest adequate time to prepare for the retreat or to engage a professional facilitator.

# Conflict conversation guide

Addressing conflicts or concerns with honesty and compassion is critical to keeping the Forum safe and maintaining trust and respect. The Conflict Conversation Guide helps two individuals talk through and listen to an issue that has come between them. The Moderator facilitates the conversation, coaching both parties through as needed. See Moderator facilitation notes at the end of this guide.

## Person with the concern shares:

- "I have a concern I'd like to share. Is now a good time?" (If not now, agree on a time.)
- "The specific facts as I remember them are..." (Pure, observable and objective facts; not judgments, attacks, conclusions)
- "This leads me to think/wonder..." (This is a way to share our interpretations, theories, wondering and conclusions about this set of facts. Our thinking may be right or it may be wrong; the important thing is to own it using "I" language.)
- "I feel..." (Honestly share the emotions you feel; once again, owning them, even if they're negative feelings like being angry or disappointed. Emotions are always shared in words, not sentences. "I feel like \_\_\_\_\_" is not a feeling.)
- "The part I've played in this is..." (Try to take ownership for some part of what's gone wrong.)
- "What I specifically want or hope for is..." (Describe what you're hoping for from the person; this paves the way for resolution and closure.)

## The person/group listening to the concern responds:

- "Let me see if I understand you..." (Paraphrase what you've heard; no interpretation, reaction, rebuttal or explanation. Just "catch the message" as it was shared, be thorough and try to put in your own words everything you've heard.)  
"Is that accurate? Did I miss anything?" (Check to see that you got it right.)
- "Is there more you'd like to share?" (Ask with sincerity. It takes courage for your Forum mate to be honest with you.)
- "Have you said everything you want and need to say?" (If yes, then offer your response.)
- Person listening responds: "Thank you."
- "My reaction to hearing your concern, my feelings and my thoughts are..." (This is not an explanation, but a chance to say what it felt like to hear this; eg, "I feel surprised and embarrassed, I did realize being late a few minutes bothered you.")
- "My response to what you want is..." (Respond to what they have said they wanted; can you meet their request, or do you want to negotiate it or counter-propose?)
- "What I want or need from you is..." (There may be something you need in order to resolve the issue; share it.)

# Moderator tips

## Facilitating a conflict conversation

- Everyone participating in, or listening to, the conversation should have a copy of the Conflict Conversation Guide in front of them and be familiar with it.
- Request that all those not directly in the conversation maintain quiet, respectful listening and not jump in.
- Remind the participants that you will be helping them follow the guide as they share and listen. You may intervene to guide the process.
- Remind participants of the importance of "I" statements to take ownership of their experience, and to avoid "you" statements, which are more likely to feel attacking in nature.
- Follow the sequence of the conversation guide. If you're feeling lost at any point, stop the conversation and inform the two parties: "Let's stop for a moment to notice where we are in the process." This will help redirect them back to the sequence of steps.
- It is very important for the person with the concern to fully share their thoughts and feelings, and not hold back the negative emotions. Some people need support to be really honest in doing this.
- It is very important that the receiver paraphrases the most important, emotionally charged parts of the sender's message. They may need help to do this.
- By the end of the conversation, the individual with the concern needs to truly be able to say they can now let it go, that it has been cleared.
- The receiver also needs to feel as if they have said everything they need to say. They should also feel clear.
- Sometimes, action steps or commitments result from this process. If they do, restate these at the close of the conversation.
- Ask for any observations or feedback from the observers.
- Acknowledge and thank the two participants.



# Icebreakers & short exercises

# Icebreakers & short exercises

Exercises under 30 minutes designed to break the ice and open or close the retreat

1. Communication starters
2. One-word feedback
3. Two truths and a lie
4. I love my neighbour
5. Ungame
6. Five minute mindfulness to start meeting
7. This or that
8. The human knot
9. Better know a Forum mate: Introductions
10. Stepping in
11. Self-reflection and two levels of sharing
12. Scavenger hunt



# 1. Communication starters

EO chapter	
Shared by	
Type of exercise (icebreaker, team-building, closing, etc)	<b>Closer or icebreakers</b>
Time required for this exercise	<b>10 minutes</b>
Objective of the exercise	<b>Helps to break the ice and get to know Forum mates</b>
Outcome of the exercise	<b>Connection</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>

## Opening

This is beneficial for newer Forums or Forums that have just brought in new members. They may also be used by mature Forums to bring some levity to the meeting. The questions tend to be light-hearted, but Level 1 questions can lead to deep responses as well!

- As a child, my favourite game was \_\_\_\_\_.
- My favourite movie of all time is \_\_\_\_\_.
- Today, I have the most fun when \_\_\_\_\_.
- I would be the happiest person in the world if I had \_\_\_\_\_.
- I will eat anything put in front of me except for \_\_\_\_\_.
- I can explain my life as an animal, and that animal is a \_\_\_\_\_.
- If I had all the money in the world, I would \_\_\_\_\_.
- School for me was \_\_\_\_\_.
- If I had to give up some modern conveniences, like my TV, car, toilet, telephone or lighting, I would choose \_\_\_\_\_.
- If I had to choose between losing my hearing or sight, I would choose \_\_\_\_\_.
- If you could be a character in any book, who would you be, and why?
- If you had the option to live in any period in history, what era would you select, and why?
- If you could relive your childhood in a country other than your own, what country would you choose? Why?
- List three things that bring you energy. List three things that drain your energy.
- How attentive are you to your physical health?
- If you could speak one language other than your native language, what would it be, and why?
- You are in a library that is burning down, and you can only save two books. Which two do you choose? What would the world lose if those two books were gone for good?

*Continued on next page ...*

Originator: Ellie Byrd (ellie@forumsherpa.com)

# 1. Communication starters

## - *continued*

- What is the most transformative travel experience you have ever had? What made it so?
- A gift I can give to others is \_\_\_\_\_.
- A gift I would like to receive from others is \_\_\_\_\_.
- What makes me laugh is \_\_\_\_\_.
- Talk about a mistake you recently made.
- If you magically had two more hours every day, how would you spend the extra time?
- If you suddenly lost two hours every day (a twenty-two hour day), how would you cut that time?
- If there were NO restrictions and you could live anywhere, where would you live, and why?
- What restrictions did you have to "remove" from your thought process in order to live there?
- What was the last book that you read? Why did you read it? What did you learn from it? Would you recommend it to others?
- Share something mischievous you did as a child.
- Your home is about to be hit by a tornado! You have 10 minutes to grab a few things and get out. What would you take?
- What is the most surprising thing you have learned about your childhood?
- Name something that happened in the past 90 days that you are proud of.
- Which holiday has the most meaning to you? Why?
- Complete the sentence: "I wish all people would \_\_\_\_\_."
- Describe the perfect vacation for you.
- Think of the three things about yourself that you like the best.
- What dream do you have that you would like to become a reality?
- If you had one wish that was guaranteed to come true, what would you wish for, and why?
- How many hours of TV do you watch each week? In what way does TV influence your life?
- What would you like to be doing five years from now? What do you think you'll be doing five years from now?
- Do you feel you have achieved mastery in any part of your life? If so, which part(s)?
- If you were a lawyer, would you be a prosecutor or a defender, and why?
- What three adjectives best describe you?

# 1. Communication starters - 5%

This is beneficial for Forums that have been together for a while (one or more years). To be completely open and honest with members' responses, a strong level of trust and confidentiality in the Forum is required.

- My most prized possession (material item) is \_\_\_\_\_.
- If I could throw caution to the wind and really take a risk, I would \_\_\_\_\_.
- I cry when \_\_\_\_\_.
- If you could choose a second set of parents in addition to your own, who would you choose, and why? What would they offer or contribute to you?
- How many of your friendships have lasted more than 10 years? Which current friendships will last 10?
- Describe what would be a perfect day for you, from beginning to end.
- If you were magically granted your dream talent, what would it be? How would that change your life?
- How do you react to difficult situations in your life?
- Describe your relationship with your mother and/or father. What was it like growing up?
- Who has been the most powerful influence on who you are today? How was that person significant to you?
- Can you be counted on to do what you say you will do? What does it take for you to trust someone?
- If someone were to write a biography about you, what would the title be?
- Name one thing you could do to improve an important relationship in your life.
- What could you stop doing now that would benefit your own growth and well-being?
- Imagine you could go back in time and change one decision in your life. Which one would it be, and why?
- Who would you like to apologize to, but haven't yet done so? What happened? What are you waiting for?
- Who owes an apology to you? What is the situation? Why haven't they apologized to you yet?
- What is your exit strategy for your business?
- Summarize your childhood in three words.
- Is it easy for you to accept help when you need it? Will you ask for help?
- Think back to when you were a child. What did you think your life would be like when you grew up?
- What were your dreams? Have any of them come true?
- Think of a positive or negative remark that was said to you as a child. How did it affect you then? What is the impact of it on you now?
- When was the last time you felt intimidated in a Forum meeting?
- What has been the greatest joy in your life?
- What are your most compulsive habits? How do you handle these?
- What is one thing you could do to improve your business?
- What is the most risky decision you ever made in your life? What made the risk so great?
- On a scale of 1 to 10, rate how balanced you think your life is right now. Name one thing you could do to improve the balance.

*Continued on next page ...*

# 1. Communication starters - 5%

## - *continued*

- When is the last time you were in a fight with someone? Who caused it?
- If you could change one physical feature about yourself, what would you change, and why?
- Imagine you are diagnosed with a rare disease. Would you choose to live healthily for six more months, or dependently and debilitated for six more years? Why?
- What is the single best decision you have made in your business?
- What is the single best decision you have made in your life?
- Describe the funeral service you would like to have held for you.
- When was the first time you fell in love? Share that story – how long, with whom, and why?
- Are you a good judge of character? Think of a time when you were wrong about someone's character, and describe the situation.
- Which photograph means the most to you? Describe the photo and why it is so powerful.
- Share a childhood experience with death.
- What are your top five priorities in life?
- Imagine you are going to be stranded on a desert island with two people for the rest of your life. Who are the two people you would choose to take with you and why?
- Describe your perfect day. How would it start? How would it end? What would you do in the middle of the day?
- Talk about a time when you have lost your temper.
- What has been your greatest success? Your greatest failure?

## 2. One-word feedback

EO chapter	<b>Idaho</b>
Shared by	<b>Jennifer Perez</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Closer or icebreaker</b>
Time required for this exercise	<b>20 minutes</b>
Objective of the exercise	<b>To boost self-esteem and help individuals bond</b>
Outcome of the exercise	<b>Feedback on how others see you</b>
Tools needed	<b>Paper, to create a raffle on the order in which you will do the names.</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> You go around the table and each Forum member says one word that they think best describes one particular Forum member. Each person says one word about the same person. You then switch who is being described and go around the table again. The only rule is that two people cannot say the same word about one particular person.	
<b>Step-by-step instructions</b> Choose an individual to start or draw a name. Go clockwise as each person delivers their descriptive word to the person indicated. Once you've gone around the circle, start with the next person in the circle (or draw a name) and then go around counter-clockwise. Continue until everyone is done, switching between counter-clockwise and clockwise.	

# 3. Two truths and a lie

EO chapter	Toronto
Shared by	Yafa Sakkejha
Type of exercise (icebreaker, team-building, closing, etc)	Icebreaker
Time required for this exercise	Three minutes per person
Objective of the exercise	The objective of the exercise is to learn more about your peers - in a fun and interactive way.
Outcome of the exercise	
Tools needed	Pens and paper (optional)
Handouts and pre-work if any	None
<p><b>Description of the exercise</b>            Everyone writes down two truths and one lie about their life and takes turns reading them out to the group. The group has to guess which one is the lie. After the presenter reveals the lie, the audience is free to ask clarifying questions about how the story came about.</p>	
<p><b>Step-by-step instructions</b>            Everyone writes down two truths and one lie about their life, and takes turns reading them out to the group. The group has to guess which one is the lie. After the presenter reveals the lie, the audience is free to ask clarifying questions about how the story came about.</p> <p>Option: You can win one point for every member fooled and a winner can be crowned. This exercise can be deepened by asking questions and clarifications about the story.</p>	

# 4. I love my neighbour

EO chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker</b>
Time required for this exercise	<b>10-20 minutes</b>
Objective of the exercise	<b>To help people get to know each other better, and to have participants recognize commonalities and personal characteristics within the group.</b>
Outcome of the exercise	
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Description of the exercise</b></p> <p>The person standing in the centre of the circle begins the game by saying, "I love my neighbour who _____," and completes the sentence with a piece of information that is true for him/her.</p> <p>Example: "I love my neighbour who was born out-of-state, loves to play basketball, has a pet, is an only child, etc."</p> <p>As soon as he/she is finished with the statement, everyone (including the person in the centre) whom this applies to moves from their current position to an empty chair that is not right next to them. The person who does not find a chair to sit in goes to the middle and begins a second round of the game.</p> <p><b>Step-by-step instructions</b></p> <p><b>Step 1:</b> Set up chairs in a circle. There should be one fewer chair than there are people.</p> <p><b>Step 2:</b> Everyone sits in one of the chairs (as if they are about to sit down) and one random person starts off in the middle (no chair).</p> <p><b>Step 3:</b> The person in the middle says out loud, "I love my neighbour who ...," followed by a statement about themselves (eg, I love my neighbour who has older siblings).</p> <p><b>Step 4:</b> Anyone for whom that statement applies must move to a new chair and sit down (the person in the centre also has to find a chair).</p> <p>Note: If the statement did not apply to a person, that person just stays where they are. It's the moving that frees up a chair for the middle person.</p> <p><b>Step 5:</b> The person who is left without a chair stands in the middle and starts "Step 3" all over again.</p> <p>Do this for several rounds (usually 10-20 minutes) to reveal all sorts of stuff about folks.</p>	

# 5. Ungame

EO chapter	<b>Pittsburgh</b>
Shared by	<b>Casey Carr</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker</b>
Time required for this exercise	<b>10 minutes</b>
Objective of the exercise	<b>To open the group up by sharing opinions, feeling and beliefs, and increasing the understanding of fellow Forum members.</b>
Outcome of the exercise	
Tools needed	<b>The Ungame card deck by Talicor</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> Randomly pull a card from the Ungame and use the question on that card for all Forum members.	
<b>Step-by-step instructions</b> <ol style="list-style-type: none"><li>1. Purchase the Ungame</li><li>2. Pull a card and ask the question</li><li>3. Repeat</li></ol>	



# 6. Five-minute mindfulness to start each meeting

EO chapter	<b>San Francisco</b>
Shared by	<b>Rudolph Mutter</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker</b>
Time required for this exercise	<b>5 minutes</b>
Objective of the exercise	<b>Centre and focus the group from outside distractions or whatever they were dealing with before continuing to the next Forum exercise</b>
Outcome of the exercise	<b>Calm and focused Forum group ready to tackle the next part of the agenda</b>
Tools needed	<b>Computer / audio</b>
Handouts and pre-work if any	<b>Search YouTube for "5 minute guided meditation" or other website of choice</b>
<b>Description of the exercise</b> Participate in a guided mindfulness exercise, usually a 5-minute recording of a guided breathing meditation.	
<b>Step-by-step instructions</b> At the beginning of an exercise or when coming back together from a break, play a pre-chosen guided mindfulness audio or video.	
<b>Debrief questions/notes</b> You can do an "opening word" exercise after doing the mindfulness exercise.	

# 7. This or that

EO chapter	<b>San Francisco</b>
Shared by	<b>Mike Simonsen</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker - dinner conversation</b>
Time required for this exercise	<b>20 minutes to several hours</b>
Objective of the exercise	<b>To engage everyone in one conversation</b>
Outcome of the exercise	<b>To achieve depth, insight and thought-provoking conversation</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> One person offers a dichotomy choice (A or B) and everyone at the table picks one. You hear what everyone else picked. Then the next person at the table offers a different dichotomy. Repeat. The secret to a great exercise of "This or That" is to go around the group multiple times, so that each person gets multiple chances to get creative with the choice they're asking. If you only go once around the table, the insights will be a bit weak.	
<b>Step-by-step instructions</b> One person offers a dichotomy choice (A or B) and everyone at the table picks one. You hear what everyone else picked. The next person at the table offers a different dichotomy. Repeat. Keep repeating. Listening to the dichotomies that others offer may trigger creative ideas for you.	

This or That – Originator - Ellie Byrd ([ellie@forumsherpa.com](mailto:ellie@forumsherpa.com))

# 8. The human knot

EO Chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Team-building</b>
Time required for this exercise	<b>10 minutes</b>
Objective of the exercise	<b>Work as a team; stand up and move around during a meeting</b>
Outcome of the exercise	
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> A good, quick, fun, team-building exercise. Everyone stands in a circle, then each person chooses two people to hold hands with (not the folks next to each other), creating a crazy "human knot". And then everyone tries to untangle and get back into a circle, all while holding hands.	
<b>Step-by-step instructions</b> <b>Step 1:</b> All participants stand in a circle (fewer than 15 people is ideal). <b>Step 2:</b> Everyone reaches across the circle and holds hands with two <i>different</i> people (so there will be arms criss-crossing every which way). <b>Step 3:</b> Without letting go of anyone's hands, the participants work together to get back into an untangled circle with everyone still holding hands.	
<b>Debrief questions/notes</b> This works well (is possible) if everyone is holding two DIFFERENT peoples' hands.	

# 9. Better know a Forum mate: Introductions

EO chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection: New member intro</b>
Time required for this exercise	<b>2 minutes per person</b>
Objective of the exercise	<b>It's a quick way to introduce new members and familiarize them with the group.</b>
Outcome of the exercise	<b>New member gets to meet the Forum, and all members are reminded of aspects of themselves and their Forum mates.</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>

## Description of the exercise

Forum members take turns introducing a current Forum member to the new Forum member in two minutes (two minutes total; not per person).

## Step-by-step instructions

- Someone agrees to go first (an existing member). That person stays silent. Set the timer for two minutes.
- In a free-for-all, brainstorm-style session, the other existing members call out things about that person (eg, he's married, he loves to golf, play tennis, etc.).
- Everyone chimes in saying something they know about the person, but in no order; they just say it out loud.
- When the two minutes is up, do the same thing for the next person.
- Rinse and repeat all the way around.

## Option

To deepen the exercise, the member being introduced can (after two minutes) be given the option to add something additional that was not mentioned or that nobody else knows about them.

# 10. Stepping in

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker</b>
Time required for this exercise	<b>10 to 30 minutes</b>
Objective of the exercise	<b>A non-verbal disclosure of different icebreaker questions or statements to get to know where people stand on different topics</b>
Outcome of the exercise	<b>Trigger alignment conversations based on what people stepped in for or not</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Step-by-step instructions</b></p> <ol style="list-style-type: none"> <li>1. Have everyone stand in a line or a circle.</li> <li>2. Explain to the group that you will read one statement at a time. And if they feel they agree with that statement, they STEP IN.</li> <li>3. Read statements one by one, and allow people to step in and out before you read the next one. Allow time for people to observe who stepped in and who didn't.</li> <li>4. Make a note of those statements where ALL stepped in or NO ONE stepped in.</li> <li>5. Choose the questions or statements you want to ask in advance to limit the time as needed.</li> </ol>	
<p><b>Instructions for participants:</b></p> <ul style="list-style-type: none"> <li>• I will read a statement, and if you agree, then STEP IN.</li> <li>• Note who else stepped in or didn't.</li> <li>• Note in what area you were hesitant to reveal the truth to the group, or perhaps were not willing to reveal to the group.</li> </ul>	
<p><b>Debrief:</b></p> <ul style="list-style-type: none"> <li>• Allow the group to debrief for as long as they need to so they can clarify and have the conversations they need to have.</li> <li>• Give time at the end for them to reveal their truth.</li> <li>• Review how they found this exercise to be. Were they surprised by anything? Did they learn anything new?</li> </ul>	
<p><b>Set-up questions</b></p> <ul style="list-style-type: none"> <li>• I am skeptical about giving up "real work" days to be here.</li> <li>• I have concerns about being fully transparent at this retreat.</li> <li>• I am losing faith in my business.</li> <li>• I believe my work life/balance has had a negative impact on my family.</li> <li>• I wear too many hats at work.</li> <li>• I have lost the passion for my business and am finding it difficult to stay motivated.</li> <li>• My relationship with my spouse is currently strained.</li> <li>• I feel overextended.</li> <li>• I am dealing with, or have dealt with, a very draining legal battle.</li> <li>• I am proud of my current physical status.</li> </ul>	
<p><i>Continued on next page ...</i></p>	

# 10. Stepping in - continued

## Group dynamics

- I can share anything with this group.
- We have effective presentations.
- I have an issue with the direction of the Forum.
- I am concerned that not all members are in the same place financially or professionally.
- The amount of time the group spends together outside of Forum works for me.
- I believe that some members hold back important and relevant information.
- The strength and effectiveness of this Forum works for me.
- I have an issue with specific individuals in the Forum.
- I wish others in the group were as committed as I am.
- I prefer the Forum to be more relaxed and less rigid.
- My Forum members are really the only people that I open up to about personal things.
- Punctuality and preparedness have been an issue in our Forum.
- Fine implementation has worked well.
- I believe we should spend less time on business issues and more on personal issues.
- I think our meetings are too casual and people joke around too much.
- I am not clear on the true value of EO.
- I am overwhelmed by guilt when I have to ask for a change in the meeting time or date.
- The meeting agenda and timing works for me.
- I feel that other members take advantage by asking for professional advice.

## Business

- My current business can likely produce dependable cash flow for a lifetime.
- I work with a business coach.
- I have a succession plan for my business.
- My business partner is a nightmare.
- There is a dynamic within my business that is keeping me up at night.
- I frequently work from home.
- My business situation is terrible.
- In my business, I'd rather be a manager than a practitioner.
- I am going through, or have been through, a business failure.
- My employees are happy and feel successful.
- I have an employee in an important role who is draining energy from our team.
- I am trying to build a broken business model.
- The roles I play within my business are my passion.
- I am very clear about where I think my company should go.
- Doing business with family members has negatively impacted personal relationships.
- I am butting heads with a partner/owner/board member, or someone on my executive team.
- I am good at expressing appreciation in my organization.
- I would like to focus more on my business strategy, rather than operations.
- I prefer to be the sole leader and decision maker.

## Personal

- Besides being with my kids, I don't know what makes me genuinely happy.
- I know my children are happy with me as a parent.
- I have risked and lost people's money that are close to me.
- I am always overcommitted and have issues with time management.
- I have streams of income coming from more than one business.
- I am unorganized.
- A close friend's divorce has profoundly affected my family dynamic.
- My spouse and I frequently fight.
- My parents set a great example for me.
- I still seek the approval of my parents.
- Most people who know me well would consider me dependable.

# 11. Self-reflection and two levels of sharing

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker</b>
Time required for this exercise	<b>Up to one hour</b>
Objective of the exercise	<b>To get to know each other better</b>
Outcome of the exercise	<b>Knowing each other better</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>

## **Step-by-step instructions**

Each member shares when the statement is read aloud:

- One thing I can remember about when I stopped believing in Santa Claus is ...
- A childhood memory of death was ...
- I knew I was (or wanted to be) an entrepreneur when ...
- The first time I had my heart broken was ...
- My biggest regret as a teenager was ...
- My biggest regret as a college student was ...
- A memory of disappointing one or both of my parents is ...
- My biggest disappointment in life is ...
- My biggest failure in life, outside of business, is ...
- My biggest failure in business is ...
- My biggest success in life is ...
- My biggest success in business is ...
- One thing I would go back and change if I could would be ...
- In business, I wish I was better at ...
- In my personal life, I wish I was better at ...
- One person I wish I could be more like is ...
- The one good thing I am 100 percent confident that others would say about me is ...
- The one bad thing I am 100 percent confident that others would say about me is ...
- My biggest fear in life is ...

**Option: You can send out the exercise in advance and request responses on 5 percent.**

# 12. Scavenger hunt

EO chapter	<b>Inland Empire</b>
Shared by	<b>Anthony Gatto</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Team-building</b>
Time required for this exercise	<b>3 hours</b>
Objective of the exercise	<b>In teams of two to four, figure out how your Forum mates think and operate.</b>
Outcome of the exercise	<b>Team-building and fun; plus you can learn a little about the place you are visiting</b>
Tools needed	<b><a href="http://www.urbanadventurequest.com">http://www.urbanadventurequest.com</a></b>
Handouts and pre-work if any	<b>None</b>
<b>Step-by-step instructions</b> Buy a scavenger hunt per team and then compete.	



# 12. Scavenger Hunt - Variation

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker, team-building, closing</b>
Time required for this exercise	<b>30 minutes for a quick activity, or 2 hours for a longer version</b>
Objective of the exercise	<b>Fun way to connect with team members</b>
Outcome of the exercise	<b>Sheets of paper with the checklist of items</b>
Tools needed	<b>Teambuilding</b>
Handouts and pre-work if any	
<b>Description of the exercise</b>	
Scavenger Hunt	
<b>Step-by-step instructions</b>	
<ul style="list-style-type: none"> <li>• Divide members into teams on day of the scavenger hunt.</li> <li>• Give each team a list of items/challenges/riddles, and a time limit to complete.</li> <li>• The goal is to find all items, or complete all challenges, on the list.</li> <li>• Tell the players how the scavenger hunt will end.</li> <li>• Let the players know where they must meet once they finish.</li> <li>• For a timed hunt, teams will work to complete as many items/challenges as possible within the allotted time period. For untimed hunts, the team to complete the list (with the fewest deductions) and return to home base first will be declared the winner(s).</li> </ul>	
<i>Continued on next page ...</i>	

# 12. Scavenger Hunt - Variation

## - continued

### List of items/challenges/riddles

- 1. Get upside down**
  - a. 5 points for doing it
  - b. 5 points for each stranger you can get to do it with you
  - c. 5 extra points for getting upside down most creatively (as voted by group)
- 2. Do a cartwheel in front of a warehouse**
  - a. 5 points for doing it
  - b. 5 extra points if you get a stranger to hold up a judging card with a score of 1-10
- 3. Shake hands with a bearded man**
  - a. 5 points for doing it
- 4. Get a kid to sing a song**
  - a. 10 points for doing it
  - b. 5 additional points for getting someone to do it in a foreign language
- 5. Do the trust/fall into a stranger's arms**
  - a. 10 points for doing it
  - b. 10 additional points if the person is over 50 years old
- 6. Do a plank for at least 60 seconds**
  - a. 10 points for doing it
  - b. 5 extra points for getting someone to do it with you
  - c. 5 extra points for being the most creative (as voted by the group)
- 7. Play leapfrog with your team outside of an office (at least 8 total jumps)**
  - a. 10 points for doing it
  - b. 5 additional points for every stranger you get to do it with you
- 8. Give or get a piggy back ride from a stranger**
  - a. 15 points for doing it
- 9. Buy the least expensive things you can find. You must be able to show a receipt.**
  - a. 10 points for the least expensive item
- 10. Decipher these clues and write the answer below for each:**
  - a. 5 points - What's black when you get it, red when you use it and white when you're all through with it?
  - b. 5 points - Throughout history, there have been thousands of well-documented cases of horses jumping over towers and landing on clergy and small men, forcing their removal. What am I?
  - c. 5 points - Stiff is my spine and my body is pale, but I'm always ready to tell a tale.



# Deeper connections

# Deeper connections

These exercises will last more than 30 minutes and are focused on sharing the “hidden window” with the group. You will discover things about yourself, such as: 5%, lifeline, five decisions in life, mentors and their learnings, and more.

1. Better know a Forum mate: Music edition
2. The angel walk
3. A secret
4. Take a step forward
5. Balance wheel (Wheel of Life) – Questions and facilitation
6. Coat of arms
7. How well do we know you
8. What I admire
9. Storytelling through music
10. Pick me up

# 1. Better know a Forum mate: Music edition

EO chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>1 hour and 30 minutes</b>
Objective of the exercise	<b>This is a different way of getting to know your Forum mates. As members reveal the stories behind their choice in music, you will feel a stronger sense of connection to the group.</b>
Outcome of the exercise	<b>The information is quite revealing and unexpected. You will learn more about your Forum mates' musical interests.</b>
Tools needed	<b>Something to play the music on (eg, laptop, phone, etc.) A pen, pencil and pad to write down the list of songs and your guesses</b>
Handouts and pre-work if any	<b>Everyone must submit their song choices to a neutral party (usually a spouse of someone in the Forum) so that everyone can play.</b>

## Description of the exercise

This exercise is mostly done during retreats, especially if you have a couple of hours to kill on a road trip. Before the exercise, everyone in the Forum must submit three songs of significance—songs that changed your life in some way—to a neutral party (someone not in the Forum). The songs can reflect the genre of music you like; it can be a special song between you and your spouse, or a song from your childhood.

Bring the playlist with you to Forum. Also print out the list—alphabetically or in random order so everyone has a copy. We will shuffle through all songs. After each song is done, we will pause to guess who submitted the song and why. It is fun to try and match the song to the member. After submitting your guess, the member will reveal themselves and share a story about the song and why it's important to them.

\*Note: There are bragging rights for those who guess the song correctly. This is a fun game to play on a long trip or over dinner and drinks.

## Step-by-step instructions

1. All Forum mates submit three songs to a neutral party before the meeting.
2. A neutral party will create a playlist of all the songs in no particular order.
3. During the meeting, each song is played and everyone has a chance to guess who submitted the song.
4. After the song, the member will reveal themselves, and share a story about the song and why they chose it.
5. At the end of the exercise, we will tally the number of correct guesses for member bragging rights.

## 2. The angel walk

EO chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>20 to 30 minutes</b>
Objective of the exercise	<b>To create an environment of deeper sharing and connection</b>
Outcome of the exercise	<b>A deeper connection to Forum mates</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>

The Angel Walk – Originator – Philip Kristianson, The Forum Whisperer ([phil@theforumwhisperer.com](mailto:phil@theforumwhisperer.com))

### Description of the exercise

As children, we are taught not to pry, to be polite and to reply cordially when some says, "How are you?" The typical response would be, "I'm fine, thank you." We often don't get to know the people around us as well as we could—and even those closest to us.

Social norms are hard to break, but there are some simple ways to create an environment for deeper sharing. One way is through role playing. The exercise below is designed to help you get to know someone you care about. It was introduced to me as "The Foetus and the Guardian Angel," which describes it well but doesn't inspire people to give it a try.

By adding a walk into this process, we can get some fresh air and a little exercise while talking to someone. This activity is called The Angel Walk.

### Step-by-step instructions

1. Pick a partner. This should be someone you trust and want to get to know better.
2. Decide how long you want to walk. Typically, the walk will last about 20-30 minutes. You will walk away from the starting point for half the allotted time, and then walk back to the starting point.
3. Decide which person will assume the role of Guardian Angel and which person is the Foetus for the first half of the walk.

### Instructions for each role

The Foetus is curious about what their life's journey is all about and can ask any question of the Guardian Angel as long as it is phrased in the first person. For example, "Guardian Angel, will I have any brothers and sisters?" or "Guardian Angel, will I be born into wealth or poverty?"

The role of the Guardian Angel will be all-knowing, answering various questions posed by the Foetus in the second person. For example, "You will have three brothers and one sister," or "You will be born into great wealth. But you will also experience poverty from age six to 10 when your father's business fails after he is betrayed by his business partner."

Note: All answers given by the Guardian Angel, even though they are in the second person, are actually about themselves.

Begin your walk with person A in the role of Foetus, and person B in the role of Guardian Angel. When you have walked for half the allotted time, switch roles so person A is the Guardian Angel and person B is the Foetus. You then walk around and then walk back to the starting point.

# 3. A secret

EO chapter	<b>San Francisco</b>
Shared by	<b>Mike Simonsen</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>5 to 10 minutes per person</b>
Objective of the exercise	<b>A deeper understanding, connection and relationship</b>
Outcome of the exercise	<b>Fun team-building, group dynamics lessons</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>A little pre-work is useful to get the best secrets and to organize the anonymous list</b>

## Step-by-step instructions

1. In advance, each member writes anonymously a secret about themselves—something that no one in the Forum knows. It can be a story or a fact, but not a lie.
2. The facilitator takes all the anonymous secrets and compiles them into a list. Each one is read aloud, and the group debates openly whose secret it is.
3. Ultimately, everyone votes who they think it belongs to.
4. The facilitator tallies the votes.
5. After all the secrets are voted and shared, the owners reveal themselves.
6. The "winner" is the person with the fewest votes for their secret.

## Debrief questions/notes

It is fascinating to see what characteristics we apply to people, and how we follow each other into voting.

# 4. Take a step forward

EO chapter	<b>Oman</b>
Shared by	<b>Sami Macki</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Getting to know one another better</b>
Time required for this exercise	<b>1 hour</b>
Objective of the exercise	<b>The objective is for members to get to know one another better, fostering bonding which will lead to more sharing opportunities.</b>
Outcome of the exercise	<b>Better knowledge of each other and their personal story</b>
Tools needed	<b>Paper and pen A facilitator who is an EO member or a person outside the organization</b>
Handouts and pre-work if any	<b>Members may be asked to list questions to ask the group in an effort to get to know them better</b>

## Description of the exercise

During the exercise, you will stand in a line while the facilitator asks a series of questions. Those who answer the question correctly will take a step forward (with no communication whatsoever). You will be given time to reflect. The process provides each member with the sense of being alone. The fact that there is no communication stops the judgment and allows you to reflect on how your peers might feel. You can ask questions, beginning with surface-level questions and gradually moving to more profound, substantive questions.

## Step-by-step instructions

1. Stand in a line and the facilitator will ask you a series of questions (eg, take a step forward if you once cheated on an exam).
2. Members move (or not).
3. Members are not allowed to talk or communicate (no smiling, giggling, rolling eyes, etc.) other than look at each other. No judgment at all.
4. Time is given for self-reflection.
5. Everyone goes back to the start line and the process continues (questions can go one level deeper and the process starts again).
6. Questions have to be pre-designed and specific to the group with the best knowledge of the facilitator. Otherwise, members can contribute questions they feel are interesting to ask and the facilitator pulls questions from the lot and designs some deeper ones based on the lot.

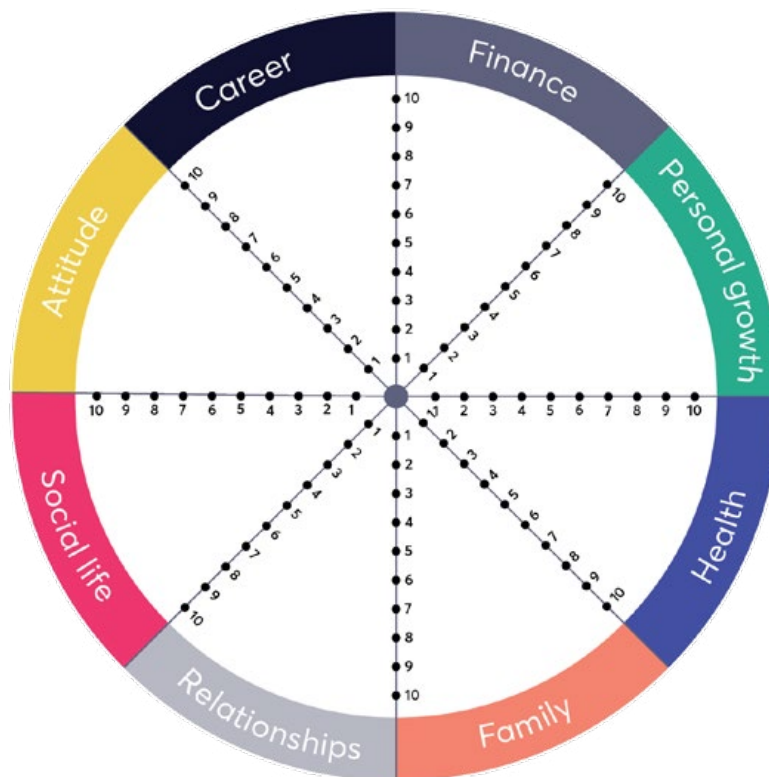


# 5. Balance wheel – Questions and facilitation

## Debrief question/notes

1. How did everyone feel when they were standing there alone?
2. What was the general feeling when the facilitator asked?
3. Do you feel like you've learned something new about each other?

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Personal reflection
Time required for this exercise	The purpose of the Wheel of Life exercise is to ensure the whole of our life is balanced in all aspects. It helps you consider each area of your life in turn and assess what's off balance.
Objective of the exercise	The Wheel of Life is a powerful tool to visualize different areas of interest in your life, identify strengths and weaknesses and work on areas where you want to grow.
Outcome of the exercise	Wheel of Life sheet
Tools needed	Members have to complete the balance wheel pre-work
Handouts and pre-work if any	



# 5. Balance wheel – Questions and facilitation - continued

## Description of the exercise

The Wheel of Life gives you a visual representation of the way your life is currently, compared with the way you'd like it to be. It is called the "Wheel of Life" because each area of your life is mapped on a circle.

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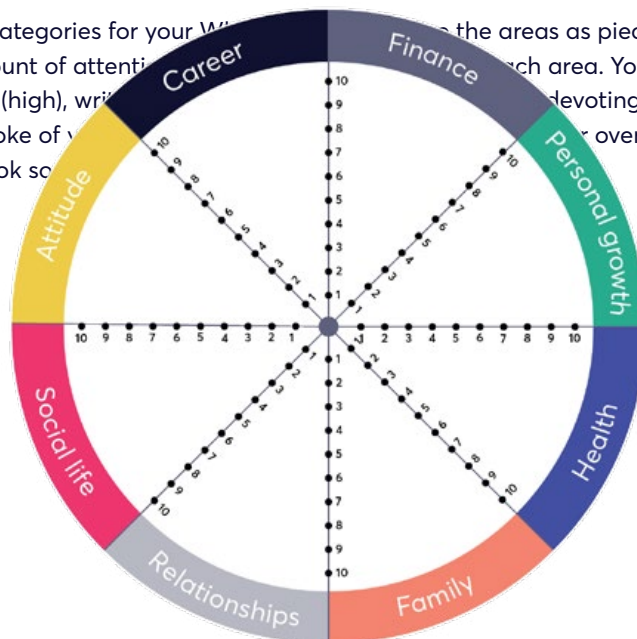
## Step-by-step instructions

Start by brainstorming the six to eight dimensions of your life that are important for you.

The Wheel of Life categories include:

- **Health:** Physical health and wellbeing (can also include emotional health).
- **Relationships:** Includes your primary intimate relationship, family and friends.
- **Social:** Includes religious/spiritual communities and other group activities.
- **Financial:** Your ability to manage your money effectively, save, budget and invest.
- **Professional/business:** This is for the work category, which can break out into a Wheel of Business.
- **Personal growth:** Area of focus for personal development.
- **Spirituality:** This can be a category or simply the driving force behind all areas of focus.
- **Adventure/fun:** This can be your interests/passion.
- **Significant other:** Spouse/life partner.

After you've identified the major categories for your Wheel of Life, divide the areas as pieces of a pie. The next step is to assess the amount of attention you're currently devoting to each area. You need to consider each dimension in turn. On a scale of 0 (low) to 10 (high), write down your current score for each area. Mark each score on the appropriate spoke of the wheel. The wheel shows your current overall life balance, and each piece represents a different area of focus. It might look something like this:



- Now connect the marks around the circle. Does your life wheel look and feel balanced?
- Think about your ideal level and plot the ideal scores around your life wheel. *Continued on next page ...*
- Now you have a visual representation of your current life balance and your perfect life balance. Where are the gaps?

The gaps can go both ways. There are almost certainly areas that are not getting as much attention as you'd like. However, there may also be areas where you're putting in more effort than you would like. These areas are sapping energy and enthusiasm that may be better directed elsewhere.

# 5. Balance wheel – Questions and facilitation - *continued*

- Review/discuss the terms to ensure that everyone has a shared understanding of each category on the Wheel of Life, or will rename theirs to a name more suitable for them.
- Discuss between two members of the group (round robin).
- Meet in pairs and for 45 seconds, state where you currently rate the first area (Family).
- Rotate pairs, and repeat for the second area (Health).
- Continue rotating and discussing a new area until participants have shared on each category of the wheel.
- Create a flip chart with the following questions:
  - Are there any surprises for you?
  - How do you feel about your life as you look at the wheel?
  - How do you currently spend your time?
  - Are there any surprises in store for you?
  - How do you currently spend time in these areas?
  - Which of these elements would you most like to improve?
  - How could you make space for these changes?
  - Can you effect the necessary changes on your own? What help and cooperation from others do you need?
  - What would it take to achieve a 10?

\*Do not show the questions until the exercise has started.

\*The gaps are the areas of your life that need attention.

## Debrief

- Note that some categories might actually be in contrast with each other (eg, spending more time with friends might take away from time with your spouse or affect your health. Look for ways where you can work on multiple areas at once).
- If this is your "unicycle of life," is it a smooth ride? Or is it pretty lumpy and lopsided? How balanced are you?

# 6. Coat of arms

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>30 minutes</b>
Objective of the exercise	<b>To integrate new members</b>
Outcome of the exercise	
Tools needed	<b>Flip chart, paper, pen</b>
Handouts and pre-work if any	

## Step-by-step instructions

When integrating new members, the challenge is how to create inclusion and connection without going over the same exercises and covering the same ground as before.

On flip chart paper or A4 paper, each person will draw a coat of arms and answer at least three of the following questions (dependent on how much time you have):

1. At one o'clock – Life growing up
2. At five o'clock – The paths you have followed
3. At seven o'clock – Those who have influenced me
4. At ten o'clock – What matters now
5. The scroll at the bottom – A fact that few people know about me
6. The crest at the top – My credo and my life motto

Allow two to three minutes for participants to gather their thoughts per segment.

# 7. How well do we know you?

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Deeper connection</b>
Time required for this exercise	
Objective of the exercise	<b>To assess how well you know your Forum mates</b>
Outcome of the exercise	
Tools needed	<b>Paper, pen</b>
Handouts and pre-work if any	

## Description of the exercise

This exercise is all about asking Forum members a list of questions to assess how well you know your Forum mates. The response to each question will help us evaluate the group's level of sharing and understanding. The questions are in two sets: 5 percent sharing and 95 percent sharing.

## Step-by-step instructions

### 95 percent:

1. When is \_\_\_\_\_'s birthday?
2. Who are \_\_\_\_\_'s siblings and what is their birth order?
3. What kind of car does \_\_\_\_\_ drive?
4. What are \_\_\_\_\_'s children's name and ages?
5. What is \_\_\_\_\_'s favourite sport? \_\_\_\_\_'s favourite sports team?
6. What does \_\_\_\_\_do in his/her spare time?
7. What religion does \_\_\_\_\_ practice?
8. What profession did \_\_\_\_\_want to be as a child?
9. What is \_\_\_\_\_'s hobby?
10. Can \_\_\_\_\_ play an instrument? Which one?
11. Name one place \_\_\_\_\_ hasn't visited.

### 5 percent:

1. What is \_\_\_\_\_'s strongest talent?
2. What is \_\_\_\_\_ most proud of?
3. What is \_\_\_\_\_ most fearful of?
4. What would \_\_\_\_\_ like to change about themselves?
5. What would \_\_\_\_\_ want their life to be like in 10 years?
6. What are three core values held by \_\_\_\_\_?
7. Who does \_\_\_\_\_ look up to/admire?
8. What could \_\_\_\_\_ give a 40-minute presentation on with absolutely no preparation?
9. What matters most in \_\_\_\_\_'s life?
10. What did \_\_\_\_\_ used to worry about, but doesn't anymore?
11. What is \_\_\_\_\_'s "why"?

# 8. What I admire

EO chapter	<b>Idaho</b>
Shared by	<b>Jim Escobar</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Team-building</b>
Time required for this exercise	<b>60 minutes</b>
Objective of the exercise	<b>Engage in a bonding experience where everyone spends a focused amount of time on each person in the Forum.</b>
Outcome of the exercise	<b>Increased bonding among members</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> As noted, you will write a paragraph or two (or highlights) about each member of your Forum and then share it with the group. For example, "It was just an awesome bonding experience. I thought it would be more awesome to recognize others, but I found tremendous joy in what was given to me. What others see in us isn't always what we see in ourselves. This exercise was incredible; it was a truly bonding experience."	
<b>Step-by-step instructions</b> We explain what we admire about person A: How they have made an impact, what we respect, what has shocked us, etc. Then we move on to the second person and so forth.	

# 9. Storytelling through music

EO chapter	<b>San Diego</b>
Shared by	<b>Michel Kripalani</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>30-60 minutes (or more)</b>
Objective of the exercise	<b>Use a musical prompt to have people share deep, personal stories from their life. This is a lightweight exercise that is easily done after a meal or over a bottle of wine as people are relaxing and bonding. It provides a framework for deep conversation and storytelling.</b>
Outcome of the exercise	<b>Deep, personal stories that are tied to the songs that trigger them.</b>
Tools needed	<b>A Bluetooth speaker and audio device that has access to a large music library</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Description of the exercise</b></p> <p>Forum members will gather in the living room, around the Bluetooth speaker. An iPhone (or similar device) with access to a large music library is passed from member to member. One by one, each member searches for and plays a song from the device. After the song plays for a while, the Forum member explains the song's significance, providing the backstory for context.</p> <p>Certain songs can trigger deep memories or hold important meaning to people. Using music, this exercise is designed to encourage you to tell deeply impactful stories from your past.</p> <p>For example, "This is the song that was playing when I knew that I had to walk away from that relationship," or, "This was the song that was playing during the birth of my son/daughter."</p>	
<p><b>Step-by-step instructions</b></p> <ol style="list-style-type: none"> <li>1. Ensure you have a Bluetooth speaker and a device that can play music to it (with a large library of easily searchable music).</li> <li>2. Place the speaker in the centre of the group.</li> <li>3. The first person finds a song, plays it for the group and tells their story.</li> <li>4. Pass the device to the next Forum member.</li> <li>5. Do as many rounds as time allows.</li> <li>6. (Bonus) Have someone create a Spotify playlist from the songs for distribution to the entire Forum afterward.</li> </ol>	

# 10. Pick me up

EO chapter	<b>San Diego</b>
Shared by	<b>Michel Kripalani</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection</b>
Time required for this exercise	<b>60 minutes</b>
Objective of the exercise	<b>Provides an opportunity for Forum members to express just how much they appreciate each other.</b>
Outcome of the exercise	<b>Each Forum member walks away with an audio file that they can listen to any time as a "pick-me-up." This has proven to be a very deep bonding exercise.</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>An iPhone (or similar) device that can record audio conversations</b>

## Description of the exercise

One by one, each Forum member steps away from the group conversation. While they are away, the remaining Forum members discuss the member who has exited solely from a positive, grateful, thankful and uplifting standpoint. The audio of the conversation is recorded. In the end, everyone is given their audio recording as a keepsake.

## Step-by-step instructions

1. Have the entire group sit at a table (or similar). The key is that the members are near to one another (so that the microphone can pick up their voices).
2. Ensure you have an iPhone (or similar) device that can record audio conversations. Place it in the middle of the group. On a dining room or conference room table works perfectly.
3. Spin one chair "away" from the group. In effect, the person sitting in this chair has their back to the group. It may be best to slide the chair away from the group a bit. The idea is to get them "outside of the circle" but still keep them in earshot (to hear the conversation).
4. One person sits in the chair that is turned away from the group.
5. It is recommended that a timer is set for each session. Three to five minutes seems to be a good duration to capture the comments.
6. Start recording. The rest of the group has a conversation about the member who has stepped "away," and they talk about how they (a) appreciate them, (b) have learned from them, (c) are inspired by them, etc. All comments are to be positive, grateful, thankful and uplifting.
7. It is critical that the person who is being spoken about does not interact. The group is to talk as if the person were not in the room. The person being spoken about should never react or speak.
8. Everyone will have three to five minutes to speak. Once the time is up, we will stop recording the comments and save it. The person re-joins the group. It is recommended that their only response to the group is a simple, "Thank you."
9. The next person sits in the "away" chair. Repeat the process from step four.
10. After everyone has had a chance to participate, the audio files are shared with the individual members.

## Debrief questions/notes

1. What was it like having to sit quietly and listen to people speak about you?
2. What emotions did this bring up for you?
3. Do you have a different perspective of how people see you, relative to how you see yourself?





# Self-reflection

# Self-reflection

Exercise examples include:  
writing your eulogy,  
understanding your balance  
wheel of life, uncovering  
patterns from your past, etc.

1. What are your fears?
2. Lifelines
3. Tombstone test
4. Future flight
5. Rose, thorn and bud
6. See and be seen
7. Horse whispering
8. How to write your own eulogy
9. Decision worksheet
10. 10-year vision, 1-year plan

# 1. What are your fears?

EO chapter	<b>Pittsburgh</b>
Shared by	<b>David Levine</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>3 minutes per person</b>
Objective of the exercise	<b>Share one fear that you have in your personal, family or business life</b>
Outcome of the exercise	<b>Sharing vulnerability and identifying common frames of reference</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> Each person identifies one fear that they have related to each of the following categories: family, relationships, running their business or other.	
<b>Step-by-step instructions</b> Go around the table and take turns sharing.	

## 2. Lifelines

EO chapter	<b>Inland Empire</b>
Shared by	<b>Anthony Gatto</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>45 minutes per member</b>
Objective of the exercise	<b>Learn the past and understand the members better</b>
Outcome of the exercise	<b>Get deep</b>
Tools needed	<b>Large poster board or PowerPoint and a projector</b>
Handouts and pre-work if any	<b>Prepare in advance to tell your story</b>
<b>Description of the exercise</b> Each member presents their individual history	
<b>Step-by-step instructions</b> Present from birth to present day	
<b>Variation</b> Link your lifeline to a common topic: <ul style="list-style-type: none"><li>• Money</li><li>• Happiness</li><li>• Relationships</li><li>• Self-esteem</li></ul> <p>You can also pick two or more and link the topics to see if they run in parallel.</p>	

# 3. Tombstone test

EO chapter	<b>Toronto</b>
Shared by	<b>Jody Steinhauer</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Icebreaker or Team-building</b>
Time required for this exercise	<b>10 to 15 minutes per person</b>
Objective of the exercise	<b>Gain perspective about where you are in life and what legacy you would like to leave behind</b>
Outcome of the exercise	<b>Explore where you want to be (legacy) as compared to where you are now, while helping the group get to know what's important to each member.</b>
Tools needed	<b>Pen and paper</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Description of the exercise</b> Have you ever thought about what you want written on your tombstone? What do you hope will be said about you at your funeral? Try writing those things down. If you like them, then think about whether you are living up to them now ... or if you have some work ahead of you.</p> <p>By contemplating our mortality, we can gain an incredible sense of perspective and clarity that can help us decide what to do with our lives, while introducing the urgency we need to take action and accomplish those goals and dreams.</p> <p><b>Step-by-step instructions</b> Each member writes down what they want written on their tombstone and shares it with the group.</p>	

# 4. Future flight

EO chapter	<b>Gurgaon</b>
Shared by	<b>Karan Sawhney</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Team-building or self-reflection</b>
Time required for this exercise	<b>2 hours</b>
Objective of the exercise	<b>To increase the Forum's closeness</b>
Outcome of the exercise	<b>Adds a personal aspect to the Forum</b>
Tools needed	<b>Pen and paper; a quiet setting</b>
Handouts and pre-work if any	<b>Write a description of your Forum mates' lives as they will be 10 years in the future</b>

## Description of the exercise

Ten years from now, you board a flight and find yourself seated with an ex-member from your current Forum whom you haven't seen in that ten year period. You tell them how your Forum has progressed and what's happening in the life of each of your Forum members.

## Step-by-step instructions

1. Spend one hour individually to write down your responses to the scenario, including personal, professional, family, health, relationships, finances and more.
2. Get back together and share what each person has written about each member.

Future Flight – Originator - Ellie Byrd ([ellie@forumsherpa.com](mailto:ellie@forumsherpa.com))

# 5. Rose, thorn and bud

EO chapter	<b>San Francisco</b>
Shared by	<b>Cory Levenberg</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Connection or self-reflection</b>
Time required for this exercise	<b>3 minutes per person</b>
Objective of the exercise	<b>Become more aware of your surroundings and incorporate gratitude into your daily routine.</b>
Outcome of the exercise	<b>Become more self-aware. Discover and focus on your strengths. Appreciate the blessings in your life, as well as the "not-so-great" things. Strengthen your relationships. Become happier by celebrating the present and blocking toxic emotions. Pay it forward to other people. Sleep better.</b>
Tools needed	<b>Pen and paper</b>
Handouts and pre-work if any	<b>None</b>

## Description of the exercise

**This is a 5-minute game to kick start your mindfulness habit with 3 questions:**

1. What was the highlight of your day? (Rose)
2. What went wrong during your day? (Thorn)
3. What are you looking forward to tomorrow? (Bud)

**By reflecting on the highlights and low points of your day, you may start to realize that:**

- There are always things to be grateful for.
- Sometimes things won't go according to plan, and that's OK.
- There are events you can and cannot control. True wisdom lies in knowing the difference and taking action about those things you can control.
- There is always room for improvement.
- Mindfulness is like a muscle: The more you exercise it, the more developed it becomes.

## Step-by-step instructions

**Start by explaining the objective of the exercise. This is supposed to be fun and anything goes. This is a judgment-free, no-pressure game.**

1. Each member takes a couple minutes to write down the answers to the three main questions. You can have multiple roses, thorns and buds. Don't feel limited to sharing only one.
2. Once you are done, everyone shares their answers.

# 6. See and be seen

EO chapter	<b>San Francisco</b>
Shared by	<b>Bowen Dwelle</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>30 minutes + 10 minutes per member</b>
Objective of the exercise	<b>Explore our own perceptions of ourselves, as well as the way others perceive us, to learn more about ourselves and our Forum mates, to engage in actively seeing each other, uncover aspects of ourselves about which we may be less aware, and notice and share how we feel about seeing and being seen by others.</b>
Outcome of the exercise	<b>Learn how Forum mates see you and gain insight about how that compares with the way you see yourself.</b>
Tools needed	<b>Paper and pen</b>
Handouts and pre-work if any	<p><b>Complete a "Who Am I" worksheet with:</b></p> <ul style="list-style-type: none"> <li>• <b>Three of the most significant events in my life, and why</b></li> <li>• <b>Three of the most significant people in my life, and why</b></li> <li>• <b>Three of the most significant decisions I've made in my life, and why</b></li> <li>• <b>Your three to five personal core values</b></li> <li>• <b>Your five or more descriptors (adjectives that describe you)</b></li> </ul>

## Description of the exercise

Forum members use active reflection and recognition to compare how they see themselves with how they are seen by others—and then discuss openly within the safe environment of Forum. The exercise is designed to help members explore the Johari Window and become more familiar with aspects of themselves that fall into "the blind spot" and "façade" areas of the window.

## Step-by-step instructions

### Moderator introduces the exercise.

1. Members take 15 minutes to fill in the "Who Am I" worksheet.
2. Then, the moderator gives each member the same number of sheets of paper as people in the group, minus one (their own).
3. Members take 15 minutes to write each of the other Forum members' names at the top of a different sheet of paper and then, one by one, focus on seeing each fellow member as clearly as possible, writing down five or more adjectives that describe each person (hint: Identify unique attributes that define each person, not only the positives about them).
4. Moderator collects and collates the sheets, so that each person gets the sheets others have filled out about them.
5. Members take three to five minutes on their own to digest and compare their own "Who Am I" sheet with the sheets from other members, and consider:
  - Which descriptors align with your own perception of yourself?
  - Which descriptors differ from your own perception of yourself?
  - Did any of the descriptors bring up specific emotions for you? It can be helpful to know basic categories of emotions: anger/mad, sadness/sad, happiness/glad, love, fear, guilt/shame, etc.
6. Going one by one and allowing 7 to 10 minutes per member, share what each person noticed and how they feel. Avoid questions and feedback from other members during this time.
7. When everyone is done, share a one-word or short phrase to close the exercise.

*Continued on next page ...*



# 6. See and be seen - *continued*

## **Debrief questions / notes**

This exercise can be very powerful. Members should be aware that they may hear some things that surprise them, and that what we see in ourselves and what we see in others isn't necessarily "true." It's perception, and others' observations about us often come more from themselves than from some truth about us.

\*Recommended for mature Forums

# 7. Horse whispering

EO chapter	<b>Idaho</b>
Shared by	<b>Jim Escobar</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>2 hours</b>
Objective of the exercise	<b>Understand how our actions and intent of communication impact the world</b>
Outcome of the exercise	<b>Know yourself better and be more aware of the half of your nature that is non-verbal when you are communicating</b>
Tools needed	<b>Horses, trainer</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> By interacting with horses and a trainer capable of teaching you how body movements express the majority of your communication to the horse, you'll have opportunities to relate that experience to the way your movements affect others when you communicate with the same energy.	
<b>Step-by-step instructions</b> Work with the trainer to allow each participant to walk around the horse, sit on it, squeeze it, nudge or heel it, gesture around it, etc, and observe the way movements and energy (mental calm, nervousness, anxiety, fear, etc.) affect the horse. Set aside time to discuss each person's observations.	

# 8. How to write your own eulogy

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>Open-ended</b>
Objective of the exercise	<b>To summarize your life as if you reached the end of it</b>
Outcome of the exercise	<b>Clarify for yourself who you are, what you do, why you are here, what you really want out of life and how you want to be remembered.</b>
Tools needed	<b>Paper and pen, or a computer</b>
Handouts and pre-work if any	<b>None</b>

## Description of the exercise

Write your "chronological eulogy" from the beginning of your life, describing where you lived, your education, marriage, family, kids, career, accomplishments and so on.

## Step-by-step instructions

**1. Write your outline, imagining that you lived to 90 and then passed away. Picture what you did during your nine decades of life as you hope to have lived it. Jot down some "memories" of yourself in response to the following questions:**

- Where did you live? Did you stay in the town where you were born? Did you live in a far-flung land? Did you move every few years? Where did you retire?
- What were your hobbies? What did you enjoy doing in your 20s and 30s? What did you enjoy doing with your family? What kept you busy in retirement?
- What kind of relationships did you have? Did you get married? How many kids did you have? How many friends did you have? Many? A few really good ones?
- Where did you go to school? What did you study?
- What did you do for work? Did you stay with one company or job your whole life, or did you change careers many times?
- Did you win any awards or accomplish any noteworthy feats?
- What was most memorable about you? Your zany sense of humor? Your delicious cooking? Your insatiable love for adventure? Your passion for the outdoors? Your unshakable faith?
- What was it about you that people admired most? Your unwavering loyalty to friends? Your honesty? Your work ethic? Your love for your family? Your patience? Your leadership?
- What will people miss most about you? The creative homemade gifts you gave every Christmas? What a good listener you were? The handwritten letters you sent to friends? The way you could turn every mishap into something to laugh about?

*Continued on next page ...*

# 8. How to write your own eulogy - *continued*

**2. Turn your outline into a eulogy, taking all of the ideas you jotted down and bringing them together in a finished project.**

**Here's an easy format to follow:**

- Birth and childhood. Keep this section brief.
- College and career. Where you went to school, what you majored in, what jobs you held. Include any awards you won or accomplishments you had.
- Family and relationships.
- Your hobbies and interests.
- The qualities and characteristics that set you apart and made you memorable.
- What people will miss about you.

# 9. Decision worksheet

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>Open-ended</b>
Objective of the exercise	<b>To become more aware of your own decision-making process</b>
Outcome of the exercise	<b>To help you analyze:</b> <ul style="list-style-type: none"> <li>• <b>Decisions made</b></li> <li>• <b>Choices available</b></li> <li>• <b>Values considered</b></li> <li>• <b>Learning</b></li> </ul>
Tools needed	<b>Pen and paper</b>
Handouts and pre-work if any	<b>None</b>

## Step-by-step instructions

Ask yourself the following questions, and write down your answers to review and contemplate:

1. In your life, what is the most difficult decision you have made related to:
  - a. Business/work/career b. Family c. Personally
    - i. What made it so difficult?
    - ii. Explain
  - b. To what extent were these decisions not only difficult, but also painful? If one of them was painful for you, rate it on a scale of 1 (low) to 10 (high).
2. In your life, what is the best decision you have made related to:
  - a. Business/work/career b. Family c. Personally
    - i. Describe it
    - ii. What were/are the outcomes that resulted?
    - iii. If anything, what did you learn?
3. In your life, what is the worst decision you have made related to:
  - a. Business/work/career b. Family c. Personally
    - i. What happened?
    - ii. Any lessons learned?
4. What major decisions are you most looking forward to making in the future?
  - a. Business/work/career b. Family c. Personally
5. What decisions are you most dreading in the future that you know you will face?
  - a. Business/work/career b. Family c. Personally
6. What do you believe your life will be like in 2030?
  - a. Business/work/career b. Family c. Personally

# 10. 10-year vision, 1-year plan

EO chapter	<b>San Francisco</b>
Shared by	<b>Rudy Mutter</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-reflection</b>
Time required for this exercise	<b>30 minutes per member</b>
Objective of the exercise	<b>Help Forum members create a vision for the next 10 years and a plan for the immediate year; ultimately, facilitate goal-setting</b>
Outcome of the exercise	<b>Become more focused going into the next year with a more structured plan and set of goals</b>
Tools needed	<b>Computer and monitor, or a projector</b>
Handouts and pre-work if any	<b>Prepare an individual PowerPoint or slideshow that walks the group through your 10-year vision and 1-year plan. Include a vision board (images) and actual timelines for the current year about what quarter certain milestones should be achieved.</b>

## Description of the exercise

Forum members take 20 to 30 minutes each to present their 10-year vision and 1-year plan to the group, and to take clarifying questions, experience shares and reflection at the end.

## Step-by-step instructions

Send out the pre-work at least a month before the retreat:

1. With the prework done, each member should take 20 to 30 minutes to walk through their "deep dive" at the retreat.
2. Allow 10 minutes after the "deep dives" for other Forum members to ask clarifying questions, share any experiences related to what they heard and reflect back (hold up a mirror) to the presenter.

## Debrief questions/notes

If a Forum chooses, it could refer back to these "deep dives" over the course of the year as a check-in to see what was planned and what actually happened.



# Forum meeting tools

# Forum meeting tools

Focused on better coaching, deep dives, 5% Reflections, Forum meeting alignment, values, purpose, etc.

1. Creating your Forum vision
2. Improve 5% Reflections
3. Practice coaching
4. Forum debate
5. Reflecting on the day
6. What worked and what didn't
7. Closing gratitude for monthly Forum meeting
8. Forum value triangle 1.2
9. Clearing the air 1.3
10. Moderator scorecard
11. Listening and difference-in-meaning exercise
12. Juicy questions for deep dives
13. Forum confidentiality case studies
14. Forum and me
15. Develop topics – From MTP programme
  - a. Relationships
  - b. Aging parents
  - c. Raising children with values
  - d. Dreams
  - e. Life is difficult
  - f. Risk
  - g. Life's greatest fears
  - h. Employee motivation
  - i. Discovery questions
  - j. Life assessment
  - k. Life's walk
  - l. Design a topic
  - m. Topical discussion
16. Content deep dive agendas
17. Strategies for generating great deep dives
18. 13 Forum guidelines



# 1. Creating your Forum vision

EO chapter	<b>Pittsburgh</b>
Shared by	<b>Andrew Bradigan</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Team-building, brainstorming</b>
Time required for this exercise	<b>60 minutes</b>
Objective of the exercise	<b>To create a vision for the Forum moving forward</b>
Outcome of the exercise	<b>Getting to know each Forum member better in order to create a vision for the Forum</b>
Tools needed	<b>Whiteboard/flip chart, markers, "Creating your Forum vision" worksheet, timer</b>
Handouts and pre-work if any	<b>Creating your Forum vision worksheet</b>
<b>Description of the exercise</b> Worksheet, verbal responses, recording of responses, brainstorming, consolidation of responses into one sentence.	
<b>Step-by-step instructions</b> Provide a "Creating your Forum vision" worksheet and ask each member to answer each question. Have each member verbally provide their answers and write them on the whiteboard/flip chart. After all answers are written down, circle all common themes and begin to group these common themes together into words/phrases. Finally, create a one-sentence vision statement using these common words/phrases.	
<b>Debrief questions/notes</b> Use the vision statement throughout the year to remind each other why we are a Forum and what we strive for.	

## 2. Improve 5% Reflections

EO chapter	<b>Pittsburgh</b>
Shared by	<b>David Levine</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>5% Reflections</b>
Time required for this exercise	<b>2 minutes per person</b>
Objective of the exercise	<b>Identify weaknesses in giving reflections, and identifying more in-depth points for discussion</b>
Outcome of the exercise	<b>Improve 5% Reflections and its benefits</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> Go around the table and have everyone recount their most recent 5% Reflection. Then identify which part of the 5% Reflections focused on facts, and which focused on feelings. Intentionally draw out more focus on how the event described made you feel, so that the group attention, and your own, can be focused on that, rather than focused on raw facts.	
<b>Step-by-step instructions</b> See above.	

# 3. Practice coaching

EO chapter	<b>Pittsburgh</b>
Shared by	<b>David Levine</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Coaching a deep dive</b>
Time required for this exercise	<b>20 minutes</b>
Objective of the exercise	<b>Demonstrating techniques for coaching a deep dive to maximize benefit</b>
Outcome of the exercise	<b>To experience a coaching session, following guidelines and identifying best practices to get optimal deep dives for maximum feedback</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>Coaching worksheet</b>
<b>Description of the exercise</b> Follow coaching guidelines with a Forum mate on a selected topic for a deep dive, while others watch the process.	
<b>Step-by-step instructions</b> See above description.	

# 4. Forum debate

EO chapter	<b>Boston</b>
Shared by	<b>Praveen Ramanathan</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Perspective gathering</b>
Time required for this exercise	<b>30-40 minutes</b>
Objective of the exercise	<b>The objective of the exercise is to help with decision-making. With a goal of quickly laying out all the considerations of a particular question/scenario/issue and understanding these various facets to ultimately help arrive at a decision.</b>
Outcome of the exercise	<b>Outcome is a clear list of all considerations around a specific question/scenario/issue.</b>
Tools needed	<b>Pen, paper and a flip chart</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Description of the exercise</b></p> <p>Likely the best way to describe this is through an example. The item on the table might be, "Is it important to have a mid-year retreat for our Forum?" The Forum members split into two groups: One for having a mid-year retreat and the other for not having a mid-year retreat. One of the members is elected as a neutral judge. It does not matter what the actual perspective of the individual member is. Once they are on a team, they are debating that side.</p> <p>Each team gets 5 minutes to prepare their case, arguing either for or against. An elected leader from each team offers their team's perspective (3-5 minutes). After both teams have laid out their perspective, the teams go back to their corners to prepare counter-arguments (another 5 minutes). Then an elected presenter from each team presents their team's perspective. After a third round, the debate ends and the judge/note-taker lays out all the arguments for and against. The Forum can then conduct a formal vote to determine what they would like to do.</p>	
<p><b>Step-by-step instructions</b></p> <p>See above description.</p>	

# 5. Reflecting on the day

EO chapter	<b>Idaho</b>
Shared by	<b>Kelly Perryman</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Closing</b>
Time required for this exercise	<b>20-30 minutes</b>
Objective of the exercise	<b>To give each person a chance to reflect and afford others the opportunity to learn from the experiences of their Forum mates</b>
Outcome of the exercise	<b>Getting everyone's input on what they learned throughout the day makes for a good closer to Forum.</b>
Tools needed	<b>Paper</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> Wad together a couple pieces of paper into a tight ball. The ball will be thrown from one Forum member to another, and whoever is holding the paper ball will share experiences from the day, such as: What things they learned, what stood out to them the most, what will they take away from the day, etc. The ball will be passed on until everyone has a chance to speak.	
<b>Step-by-step instructions</b> See above description.	

# 6. What worked, what didn't

EO chapter	<b>San Francisco</b>
Shared by	<b>Rudolph Mutter</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Closing</b>
Time required for this exercise	<b>5-20 minutes</b>
Objective of the exercise	<b>Get immediate feedback for the next retreat or Forum meeting while it is still relevant and top of mind</b>
Outcome of the exercise	<b>Iteration and improvements to subsequent Forum retreats and meetings</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	<b>None</b>
<p><b>Description of the exercise</b> A round-table discussion at the end of a Forum retreat or meeting where you prompt the group for immediate feedback and facilitate a discussion.</p>	
<p><b>Step-by-step instructions</b></p> <ol style="list-style-type: none"> <li>1. Prompt the group by asking, "What worked? What didn't? Did you get what you came for?"</li> <li>2. Facilitate a discussion, one question at a time. Take detailed notes of positive and negative feedback.</li> <li>3. Try to ascertain if the group is in agreement on feedback, but don't try to make any definitive decisions in the moment.</li> <li>4. Keep the discussion to comments and suggestions; this is not a debate. Keep it action-oriented and avoid complaining.</li> <li>5. It's good to do a "closing word" after this exercise.</li> </ol>	
<p><b>Debrief questions/notes</b> Moderator/facilitator should review all notes and come to some decisions on how to iterate for the next retreat/meeting.</p>	

# 7. Closing gratitude for monthly Forum meeting

EO chapter	<b>Idaho</b>
Shared by	<b>KaLinn Dishion</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Closing</b>
Time required for this exercise	<b>1-2 minutes per person</b>
Objective of the exercise	<b>Leave with a positive mindset and acknowledge themselves (which rarely happens)</b>
Outcome of the exercise	<b>Feeling good</b>
Tools needed	<b>A state of gratitude</b>
Handouts and pre-work if any	<b>None</b>
<b>Description of the exercise</b> Gratitude to self and others	
<b>Step-by-step instructions</b> In closing, please share a gratitude you have for someone in your life or something someone did for you this past month. Then share a gratitude you have for yourself, something you did (or didn't do), something you learned and something you appreciate about yourself.	
<b>Debrief questions/notes</b> It is surprisingly easy to be grateful to someone else in your life, but most people find it challenging to voice a gratitude to or about themselves. This exercise creates self-awareness and self-acknowledgement.	

# 8. Forum value triangle 1.2

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Forum meeting tools</b>
Time required for this exercise	
Objective of the exercise	<b>To find out where members find value in their Forum experience</b>
Outcome of the exercise	<b>What, how and where does the GROUP want to create more value for each other, and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions and topics that would create more of what the group wants.</b>
Tools needed	
Handouts and pre-work if any	

## Step-by-step instructions

**Value triangle** - Where do we find value from our Forum experience?

### Directions

- Give each member a copy of the Triangle found on the next page, the one with just the triangle in the centre.
- Read the descriptions on the next page out loud to the group. For each of the "points" of the triangle, encourage a short discussion in your group of what those corners could mean in your Forum. It is helpful if there is shared understanding of the three "axis" points.
- Ask each member of the Forum to put a dot in the approximate spot that would represent the current value they receive from Forum, approximating the distance from each corner as representing where the value they have recently been getting from Forum sits. Make the size of the dot represent how much of this value they have been receiving. Don't compare with each other—mark your dot on your sheet.
- Then, ask them to draw a line from their dot to where they would like to shift toward on the value triangle based on their current trajectory in life. Then connect those dots as an arrow (with the arrow head on the end pointing to their ideal ratio of value).
- Then put a flip chart up with the triangle drawn in the centre, and the corners marked exactly as on their sheets. Ask each Forum mate to bring their sheet to the front and copy exactly what they drew on their sheet onto the big flip chart, with their dots and arrows. They can put their initials on their arrow if they would like. Different coloured markers are helpful if there are tight groupings or crossing lines.
- Allow time for the group to ponder the drawing you have created. Then, lead a group decision: What does the group see? What do they notice? What is surprising? What did they already "know"? What is their interpretation of what the groupings or directions of the arrows mean? You can do this "popcorn" style or by making space for each member to speak.
- A group member that is an "outlier" or wants less of some value may have good resources outside of the Forum – and thus is not "opposed" to more of "that," but rather isn't specifically looking for it inside the Forum.
- What, how and where does the group want to create more value for each other – and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions, topics that would create more of what the group wants.
- You, as Moderator, can hopefully gain group agreement as to some specific changes for upcoming Forum meetings – perhaps for the next year.



# Value triangle corners

## Value triangle corners

### Connection:

We "belong" in this group – they are our tribe; we enjoy each other's company and we understand each other. Connection activities can be inside a Forum meeting or between meetings – enjoying meals together, activities, spending time with families (spouses and/or children), sharing stories of our fun activities and doing activities together. We love hanging out and sharing with each other.

### Business tactics and tools:

Take back and implement in my business: tools, strategies, processes, agreements and other "plug and play" info that I can use in my business, and use to make improvements in the near term. I connect with trusted experts, learn about other industries and am introduced to people, tools, software, processes, systems and manuals that I can adapt and use. We are efficient and effective within our Forum. We go deep sometimes, if we need to.

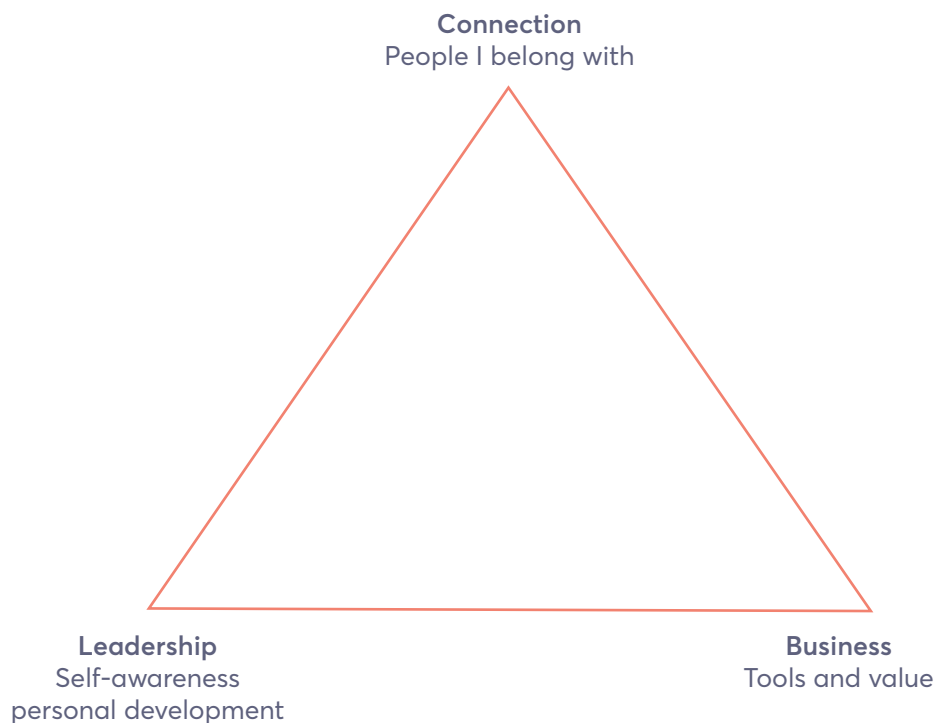
### Leadership self-awareness/Personal development:

I want to see myself more clearly; see into my blind window and view what I don't realize about myself, such as my impact and relationships with others. Developing into a more mature and effective leader is a journey, and those who are engaged and intimate with me – but not attached to my outcomes or the stories – can offer a lot of useful information. Our Forum is focused on the 5% ... we are very vulnerable and authentic.

Phil Kristianson

Forum Whisperer: [phil@Forumwhisperer.com](mailto:phil@Forumwhisperer.com)

Many thanks to Les Hayes for creative input and graphics, as well as Mo Fathelbab for the inspiration!



# 9. Clearing the air

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Clearing the air – Originator – Philip Kristianson, The Forum Whisperer ([phil@theforumwhisperer.com](mailto:phil@theforumwhisperer.com))

## Objective of the exercise

The foundation of a high-functioning Forum is its ability to maintain a safe environment. There are several fundamental behaviours that allow this safety to exist: Confidentiality, Forum Mindset (Gestalt) and personal responsibility. A behaviour that is at the core of personal responsibility is recognizing and acknowledging conflict. If a situation arises where a member feels conflicted about another member, their responsibility is to go to the source of that conflict and have a conversation with that person in order to put that conflict to rest for their own benefit, that of the other individual, and to maintain the safe environment of the Forum.

In a perfect Forum with all members dutifully practicing personal responsibility, nothing would have to be done to maintain this safe environment, which is foundational to creating a high-value Forum experience. The reality, however, is that no Forum is "perfect." Populated by humans with varying degrees of emotional intelligence, maintenance of the safe environment is often necessary.

One highly effective process introduced within the Forum communities and adopted by other Forum groups in EO, HBS Alumni Forums and others is called "clearing," "issues clearing," or "clearing the air." The details of this process have some variation across communities and Forums. What follows is a description of the process that I have evolved and used both in my own Forums, and with many other Forums in my role as a Forum retreat facilitator.

## "Clearing the air"

Clearing requires someone to lead the group through the process. This can be an outside facilitator, the Forum's Moderator, or if the Moderator has something that they need to clear with another member, they can have their Moderator-elect or elect-elect lead the process. If the Forum is not experienced with this process and the Moderator is aware of a significant, unresolved conflict, then engaging a facilitator to both lead the process for the first time, as well as teaching the Forum how to utilize this process on their own at future meetings, may be a wise decision.

- Clearing the air can be used when needed, or more proactively on a quarterly basis as part of the Forum's annual rhythm.
- Ideally, make sure all members of the Forum have advanced notice that the clearing will be happening at the following meeting. This can be a catalyst for members who are aware of a conflict to reach out directly to a member they have a conflict with and work to resolve it one-on-one prior to the issues clearing in the Forum meeting.
- Schedule the clearing at the beginning of the meeting with enough space and flexibility in the agenda to avoid feeling rushed or running out of time, as the length of this process can vary. My experience has been that after a well-run clearing, members often feel very open to each other, and this can have a very positive impact on the safe environment for the balance of that meeting.

*Continued on next page ...*

# 9. Clearing the air - continued

- Whoever is leading the clearing process should be the first to share, setting the tone and allowing that person to focus all of their attention to facilitating the overall session.
- There are three parts of the clearing process.
  1. The first round
  2. The clean-up round
  3. (Optional) The facilitated communication session if there are still any members who are not clear with each other after the clean-up round.

Note: If the members who have an unresolved conflict have not discussed this before, then they may wish to get together prior to the next Forum meeting on their own. If they have already tried to resolve the conflict and have been unsuccessful and are not comfortable processing the conflict with the facilitated communication process in front of the Forum, they are welcome to have the facilitated communication done mid-month with the assistance of the Moderator or another member of the Forum. The advantage of having the facilitated communication take place in the Forum meeting is that it allows all members to become more comfortable with this part of the process and develop the skill themselves, which can be utilized in other parts of their lives.

## **a. The first round**

The person leading the clearing starts with the member on their left and looks directly into the eyes of that member for the amount of time it takes to take a deep breath in and out, and checks in with themselves to see if anything is getting in the way of them being clear with that person. This starts by seeing if any negative feelings bubble up. If there are none, then verbalize "I am clear with you." If there is something, then verbalize "I am not clear with you," and communicate the feelings you are having and why you are having them. This lack of being clear or clean with someone tends to either be because you have done or said something, or not done or said something, that is getting in the way of you being clear with them.

Example: "Bill ... I am not clear with you. I told you that we would meet up, and I would share with you the hiring and on-boarding process we have adopted, and I had to cancel on you twice at the last minute. I have been feeling guilty about that and want to let you know that I meant no disrespect. I apologize and would like to commit to you that I will make it a high priority to meet with you as soon as it works for our schedules."

Or someone else has done or said something that is getting in the way of you being clear with them.

Example: "Sally ... I am not clear with you. At our last Forum meeting, I presented about the challenges that I am having with my teenage son. It was difficult for me, and I was feeling very vulnerable. You made some comment to Jim, and you both laughed. Given how raw I felt at that moment, the timing of your comment and laughter hurt me. I hadn't thought about it until I saw you at the beginning of the Forum meeting and the feelings immediately came back."

Notice in both cases that the person shared their reality without judgment or accusation. We are all allowed to feel what we feel as long as we don't blame others for our feelings. The person leading the clearing should be listening carefully and observing not the person speaking, but instead the person being spoken to, in order to both hear and see if they are feeling judged. If so, coach the person who is doing the clearing to share their piece of what is keeping them from being clear.

There is no response back from any of the Forum members. The person leading the clearing thanks each member after they have cleared all the way around the Forum. Each member takes their turn until all have spoken, concluding round one.

*Continued on next page ...*

# 9. Clearing the air - continued

## **b. The clean-up round.**

The person leading the clearing starts the clean-up round by looking around the circle to see if there is any residue left with anyone, and then shares anything they need to share, making sure they are clear. This goes more quickly and doesn't require looking each person in the eyes and stating that they are clear. Either you are clear with everyone or you are unclear with someone, and again, you share your feelings. Each member then does the same. This clean-up round allows the Forum members who went early in the first round to address anything that came up after they cleared. This could come in the form of a clarification or an apology. If everyone is clear after the clean-up round, then thank everyone for participating and move on to the next item on the agenda. If someone is still unclear, then there needs to be a brief discussion as to whether or not the group wants to support closure by having the person leading the clearing round facilitate a discussion between the two members. If a member is still not clear with another member and they have not yet met to discuss this, then that would be a good next step for them. If they have met but couldn't work through it on their own, then the facilitated discussion could happen in private prior to the next Forum meeting, or it could be done right after the clean-up round.

## **c. The facilitated discussion.**

The two members who did not reach clarity in the first two rounds would sit across from each other with no table in between them, and with their profiles to the Forum group. The person facilitating the discussion would sit at 90 degrees to the two members facing the Forum. The following steps should then be taken:

**Step 1.** Ask each person to share with the other person something that they appreciate about the other. If it is evident that one member has a stronger issue than the other, start with them. Some people have the tendency to close down when someone is upset with them, and appreciation opens them back up and allows them to more clearly hear the other person. By identifying something that we appreciate in someone we feel hurt by, it reduces our tendency to attack.

**Step 2.** Again, select the member who has the stronger issue to start, or ask who wants to go first if the lack of clarity seems mutual. Ask person A to share with person B what it is that is causing them to be unclear with person B. Observe person B as person A is sharing, and then ask them to reflect back to person A what they have heard, then ask person A if person B was accurate. If person A feels that person B reflected them accurately, then ask person A if there is anything else they want to share. If they don't feel that they have been accurately reflected, ask person A to repeat what they wanted to share with person B, and have person B attempt to reflect it again.

Repeat this until person B feels that the reflection is accurate. Then ask person A if there is anything else. If there is, ask them to share it, and repeat the sharing and reflection process until person A says that there is nothing else. Now ask person B to tell you how they think person A is feeling. Check in with person A to see if person B is accurate, and if they feel anything else. Thank them both and ask person B what they want to share with person A, and then repeat the same process that you used with person A.

Note: You may need to interrupt the person sharing to allow the other person to reflect if the person sharing goes on too long, if their sharing has complexity of detail, or if you observe the person who is listening becoming defensive.

Repeat this facilitated communication process until both parties have been thoroughly heard and acknowledged.

# 10. Moderator scorecard

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Forum tools</b>
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## **Objective of the exercise**

The Moderator scorecard is a method for you to assess your handling of 10 moderator skills and to get input from your Forum members. This assessment is best done after you have served as the Moderator for three to six months. By reviewing your self-assessment and the input from your Forum, you can consider possible changes to your style and/or actions as a Moderator. This optional exercise is intended to be a positive learning experience for you as the Moderator. Consider whether you will be comfortable reading the responses (regardless of how positive or negative they may be!) if you decide to use this exercise.

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Moderator Scorecard – Originator - Ellie Byrd (ellie@forumsherpa.com)

# 10. Moderator scorecard

## - continued

### Step-by-step instructions

1. First, assess your perception of your own skills by completing the scorecard for yourself.
2. Next, have a candid discussion with your Forum about the scorecard and its purpose. Assure them that their responses will be held in complete confidence and that you will be using their input for your own self-improvement. The main purpose is for you to understand their perceptions and thereby improve the Forum experience for all members.
3. Distribute a copy of the scorecard to all Forum members and ask them to complete the form. This is best done at the end of the Forum meeting during housekeeping functions.
4. Collect the responses and wait until after the meeting to review them on your own.
5. You may want to make a list of areas where you feel you want to make changes, as well as a list of the areas where your own perceptions are vastly different from the perceptions of your Forum members. Consider how you might want to make changes in your style. You may want to share your plans with the Forum and ask them for their help in specific areas, if appropriate.

### Moderator scorecard

Circle a number from 1 to 10 to indicate your impressions of the current Moderator's skills and handling of the Forum. If a topic is not applicable, skip the question.

LOW, WEAK HIGH, STRONG (1 2 3 4 ... 10)

Clarity and communication of Forum vision	1	2	3	4	5	6	7	8	9	10
Organization and planning skills	1	2	3	4	5	6	7	8	9	10
Listening skills	1	2	3	4	5	6	7	8	9	10
Communication clarity and consistency	1	2	3	4	5	6	7	8	9	10
Compassion when needed	1	2	3	4	5	6	7	8	9	10
Firmness when needed	1	2	3	4	5	6	7	8	9	10
Decision-making skills	1	2	3	4	5	6	7	8	9	10
Conflict-resolution skills	1	2	3	4	5	6	7	8	9	10
Commitment to Forum	1	2	3	4	5	6	7	8	9	10
Modelling the desired behaviors	1	2	3	4	5	6	7	8	9	10

Optionally, name one thing that this Moderator does particularly well:

Optionally, name one area where this Moderator could improve:

# 11. Listening and difference in meaning exercise

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Forum tools</b>
Time required for this exercise	
Objective of the exercise	<b>A simple exercise to illustrate the communication problem</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Listening is a critical communication skill and involves much more than the act of just hearing what someone says. It takes into account not just the speaker's words but also body language, tone and emotion.

## Step-by-step instructions

### I didn't mean that!

When making a Forum "deep dive" (or engaging in any other form of communication), what the speaker says and what the listener hears can be two different things. Usually, the listener uses his own frame of reference in applying meaning to the speaker's words. The result is listeners think they have understood the speaker's point, but they are really internalizing a projection of themselves. In order to get around this, listeners must use "active listening," which takes into account not just the speaker's words, but also body language, tone and emotion.

A simple exercise to illustrate the communication problem is as follows: Give the Forum one word (suggestions: "family" or "love"). Each Forum member writes down 10 words that quickly come to mind when thinking of the given word. Divide the Forum into groups of three or four and have the groups compare lists. How many times was the same word on all three lists?

This is a well-known communication exercise, and the results are highly predictable. An unusual group will match two out of 10 words. More typical will be a match of one word or no matches across all three lists. Of course, the lesson is that we cannot begin to understand the speaker by focusing on words alone. Forum members need to use active listening to truly understand.

A related thought to share with the Forum is as follows: "The opposite of speaking isn't listening. The opposite of speaking is waiting to speak." This is especially true with EO groups. The listeners' real challenge during a Forum "deep dive" is to not mentally race ahead with the solution and wait to speak. When the listeners race ahead, they are not using their brain power for active listening. They are using their brain power to project personal assumptions and have probably misunderstood the presenter's message. Of course, any conclusions will probably be off-base.

# 12. Juicy questions for deep dives

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	Questions to help the presenter "dive deep"
Outcome of the exercise	
Tools needed	Juicy questions for deep dives.docx
Handouts and pre-work if any	

## Set the stage:

- Outline the situation; what's going on? What's *really* going on?
- What do you want for yourself?
- What do you *really* want for yourself?
- What are the benefits to you for achieving\_\_\_\_\_?

## Decisions

- What is your decision?
- What is your commitment?
- What agreement are you prepared to make?

## Gather data:

- What information do you still need?
- What are your options?

## Explore:

- How does the current situation serve you?
- What are your options?

## Actions:

- Specifically, what will you do?
- How / By when will you\_\_\_\_\_?
- What would support for you look like?
- How will you measure progress / success?
- Who will hold you accountable? How?
- What are your boundaries / limits?

## Gather data:

- How are you feeling about\_\_\_\_\_?
- I notice [*emotional signal*]; What's coming up for you now?

## Blocks and fears:

- What's at risk to \_\_\_\_\_or for\_\_\_\_\_?
- Are you willing to take the risk? [Yes or No]
- What / Whom do you need to let go of?
- Are you willing to let go? [Yes or No]

## Closure

- What / Who needs to be appreciated?
- What needs to be celebrated?
- What is the lesson learned?



# 13. Forum confidentiality case studies

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	<b>To take the group closer to the real context of a situation or problem, and identify its cause and solution.</b>
Outcome of the exercise	<b>This exercise is great for sharing experiences and reaffirming Forum knowledge and understanding.</b>
Tools needed	
Handouts and pre-work if any	

## Step-by-step instructions

### Case #1 - Good news or bad news, all news must be confidential

Sam made what he hoped would be the last detailed "deep dive" on the topic that he and his Forum group had been sharing ever since he joined EO. As president of his family company, Sam had never been able to see eye-to-eye with his cousin, Frank, who was an equal shareholder and VP of Manufacturing. From Sam's point of view, the company's financial decline during the last few years had been the result of Frank's lack of initiative and his total disregard for quality. From Frank's point of view, the decline was due to intentional, but unidentified, actions by Sam to keep the company's value down while the two cousins discussed the possibility of a buyout. Sam's Forum group had mentioned a concern that the family conflict created a distraction and lack of focus that would continue to drag the company down. Some of the best employees were leaving, and even some of the most risk-averse employees were job hunting in fear that the company would suddenly close or be sold because the two cousins could not reach an agreement on anything, let alone on the buyout.

In this month's "deep dive", Sam's mood was decidedly upbeat. In two weeks, he was scheduled to finalize the buyout that would give him ownership of the company. The price he was paying was more than he thought was fair, but he felt a premium was necessary to overcome his cousin's belief that the company's problems were a sham designed to deny him the full value of his ownership position. Getting Frank to the point where he would accept any deal had been a delicate process.

Sam was concerned about how long it would take him to turn the company around, but he was energized by the opportunity to focus his undistracted attention on the challenge. He was especially encouraged by the fact that a key employee who had left the year before had called Sam the day before to say he would love to have the opportunity to return to Sam's company, assuming that the cousin was gone.

The mood in the Forum reflected the change. The entire group felt Sam's enthusiasm. Sam was one of those people everybody wanted to see succeed, and his conflicts during the past few years had been an emotional burden on the entire Forum. Feeling that burden lifted boosted each member as the meeting ended.

*Continued on next page ...*

# 13. Forum confidentiality case studies - continued

Two days later, Bill, one of Sam's Forum members, was at the health club working out where he ran into Charlie, a friend who knew Sam as well. Charlie asked if Bill knew how Sam's business was doing, since Sam had not been the frequent presence at the club that he had been a few years before. Bill said, "I can't tell you anything, but I think Sam's future looks terrific. Maybe if he shows up here you can ask him." Few people outside the company or the Forum group knew of the family conflict or the impending buyout.

That weekend, Charlie attended a cocktail party, where he saw Sam's cousin Frank talking effusively to a small group. Charlie walked over and said, "Frank, I heard from one of Sam's friends that your business has some great prospects ahead. What's up?"

With that, the fragile agreement Sam and Frank had crafted fell apart, with Frank totally and wrongly convinced that Sam had been withholding critical good news from him.

## **Case #2 - Kindness and concern can backfire**

In the chapter, Forum meetings were scheduled just prior to chapter meetings. Forum members would spend four hours together and then the chapter would meet for cocktails prior to the guest speaker and dinner. At the meeting of Forum IV, the bulk of the time had been focused on a discussion of how and whether to pass wealth on to children. Early at the meeting, during the very end of his five-minute update, Greg had mentioned that his wife, Karen, had been ill and they were concerned because they weren't sure what the problem was. Everybody in the group liked Karen. She had always gone out of her way to show thoughtfulness to Greg's Forum members and their spouses. Greg was quiet during much of the meeting, but none of the members noticed due to their focus on the discussion topic.

The Forum meeting ended, and shortly thereafter, the entire chapter gathered for the meeting. Greg, Karen and another couple were standing near the bar when one of Greg's Forum members came up to Karen, gave her a kiss and said, "I hear you've been ill. I hope you're feeling better soon." As she heard the words, Karen stiffened and Greg turned white. The few couples nearby sensed the sudden silence and then Karen started to cry. Greg put his arm around her and they headed out the door. The few people who were able to see them in the last instant before they entered the elevator could see that Greg was crying, too. Greg's brief mention during his five-minute update was all he could bring himself to share with his group that day. He wanted to share more, but found that he didn't have the emotional resources to do it that day. He knew he had to be first on the agenda next month, though.

He needed time to adjust to the news he and Karen had heard that week, and to hope that the initial reports were wrong. He and Karen had agreed the Forum should know something, but wanted to limit the details until the information became more concrete. Neither Greg nor Karen wanted EO members outside the Forum to know anything. Karen had spent her life knowing she might be stricken by the same disease that had taken both her mother and her grandmother at an early age. The symptoms that had started recently might be something else, but she was due to enter the hospital the next day to start the tests that might tell her what she had been afraid of hearing for most of her life.

They had decided to attend the EO meeting that evening because it was a chance to get away from the cloud hanging over them, and to distract Karen from the tests she would begin the next day.

*Continued on next page ...*

# 13. Forum confidentiality case studies - continued

## **Case #3 - Do small pieces matter?**

Jim walked through the front door of his house an hour later than expected. His wife, Jane, knew he had been at his EO Forum meeting. She was very supportive of his Forum involvement, and she never probed about what had taken place at the meetings. She knew the value of confidentiality, and each of them had learned to live with the awkwardness this sometimes caused.

Jim was clearly drained when he came in the door. He hugged Jane for an especially long time, even for him. When they were going to sleep that night Jane heard Jim sigh, then he said, "Honey, I can't tell you how much I appreciate how you communicate with me. I know if we have problems you'll talk to me about them instead of letting them build up until it's too late. I just feel lucky right now."

As Jane lay there in the dark, she thought back to that morning when Jim's Forum agenda had been out on the breakfast table. The only item had been a "deep dive" from Henry.

## **Case #4 - You mean I'm not supposed to tell anybody?**

Forum #1 had been the first Forum to form in the chapter. The members were proud of how they had kept their group active during that time and how they had followed Forum protocol closely. Each meeting began with and ended with an affirmation of the group's commitment to confidentiality.

At a recent meeting, Ian mentioned in his update how difficult it had been to not share a piece of news with his wife. At that point, Randy said, "Well of course confidentiality doesn't go that far. My wife is my best friend. I tell her everything. She won't tell anybody else." In the ensuing discussion, it appeared that two other members also had situations where they shared Forum information "because the people I tell won't tell anybody, and because I don't think they know any EO members."

Forum #1 was the first Forum to fold in the chapter. A few members left the chapter, as well.

## **Case #5 - Confidentiality is forever, isn't it?**

Vern was a great source of stories while he was in EO. Many of the stories he told, while other stories were told about him. He was a larger-than-life entrepreneur who left enough stories in his wake to keep a comedy writer employed for a decade. A few stories, however, were told only in his Forum.

The chapter and his Forum missed Vern when he graduated. His memory stayed alive for two reasons. First, the "Vern stories" continued to entertain members as they continued to be told. Second, Vern had become a widely known celebrity in the city. There was talk of his seeking public office.

Within the Forum Vern left behind, some of the stories continued to be told. Their entertainment value was too irresistible to suppress. As new members joined the Forum, they inherited the legacy Vern left behind. Apparently one of the new members didn't understand that confidentiality was forever, and he carried one of the most entertaining and private stories to a cocktail party.

Two months after Vern announced his intention to run for congress, a reporter at a news conference stood up and asked, "Is it true that ...," and recounted the story Vern had thought had been safely entrusted to his Forum.

*Continued on next page ...*

# 13. Forum confidentiality case studies - continued

## **Case #6 - If I don't tell you everything, you won't figure out who I mean.**

Rahul returned from his Forum meeting and remarked to his wife, "You won't believe what some people will do. There's one guy in my Forum who has a brass picture frame manufacturing company with 60 employees. He's tight on cash, so he isn't depositing his employees' payroll tax withholdings. He and his sister own the business 50/50, and she is the sales manager, but now they're not talking, so he doesn't know what she's doing in sales, and she doesn't know what he's doing with the payroll tax withholdings."

When asked by his wife whether telling this story might violate Forum confidentiality, Rahul responded, "I kept it confidential. I didn't tell you who the company owner was."

## **Case #7 - Where is that nickname from?**

Roger joined his Forum for their retreat in Wyoming. Roger had been given some health warnings by his doctor, though he had not shared that fact with the group. Part of his health improvement plan was to quit smoking, but he had not told his Forum group of his plan, nor had he told them that his smoking was the primary obstacle to his reuniting with his wife. The Forum knew of the separation, and also knew that both Roger and his wife wanted to find a way to make things work. The couple had "dates" together, including EO events, but were living apart.

Since Roger was the only smoker in the Forum, he was often the subject of well-intentioned banter about his habit. After dinner at the retreat, Roger was at the edge of the clearing smoking his customary 2-3 cigarettes when one of the members joked, "What are you doing, Roger, sending us smoke signals from the trail?" After the laughter and a series of add-on jokes, including some about being healthier, Roger received the nickname "Scout." The nickname was well-broken-in and entrenched in the Forum's habits by the end of the retreat.

At the next month's chapter meeting, Roger and his wife arrived, and Roger was immediately greeted as "Scout" by one of the Forum members. When his wife asked what "Scout" meant, the Forum member laughingly said, "It's because Roger smokes so much he reminds us of an Indian scout sending up smoke signals."

## **Case #8 - Believe everything you read in the papers.**

The Wilson Brewing Company had been the focal point of the town of Middleton for eight decades and three generations of Wilson family ownership. Wilson Beer was a household name in America, yet the company's competitiveness had declined as inter-family squabbling had grown. The current Wilson president, Kate, an EOer in Forum, saw her company go bankrupt, in part because of one branch of her family that wanted current dividends more than they wanted a viable company in the future. As this branch of the family made the president's life more and more difficult, they became increasingly critical of her management as well. The criticism was fuelled by resentment from some of the more conservative family members that a woman was in charge of a company that had started from a tradition of tough, hard-talking and hard-drinking Wilson men. The Forum group had seen the entire process unfold, and they were convinced the situation was unmanageable. They felt strongly that Kate was an excellent manager in an impossible situation.

The story made the *Wall Street Journal*, the trade journals and *Business Week*. The most critical stories were in the local press, where the dissenting side of the family found an easy avenue to blame Kate. Kate refused to be drawn into the public debate and refused interviews.

*Continued on next page ...*

# 13. Forum confidentiality case studies - *continued*

One of Kate's Forum members was sitting at a business luncheon when the topic of the newspaper articles came up. Everyone around the table talked "knowingly" about what a poor manager Kate was, and several intimated that it was because she was a woman. At that point the Forum member "lost it" and quickly argued against everything in the article, point by point. In his arguments he brought up several details that had only been mentioned in Forum.

A week later he saw his statements reprinted in the business section as coming "from a knowledgeable source."

# 14. Forum and me

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	<b>Focusing on openness and truth-telling in our Forum</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

### Step-by-step instructions

1. Send form as pre-work.
2. Go around the group, question by question.
3. After each round, come to a consensus on what the Forum commits to doing and write it on a flip chart.
4. Repeat for each question.
5. At the end, add all commitments to the constitution and have everyone sign it.

### Forum and me

1. How am I doing as a member of this Forum?
2. What is my role in this group?
3. Am I truly present in Forum? What distracts me? What prevents me from being 100 percent present?
4. How do I think people perceive me in Forum? Am I this person outside of Forum?
5. What do you appreciate about all of the other Forum members?
  - a.
  - b.
  - c.
  - d.
  - e.
  - f.
6. What gift/talent of each member of Forum do you think he/she is not using in Forum?
  - a.
  - b.
  - c.
  - d.
  - e.
7. What is my definition of success for this Forum (vision/purpose/why do I do this)?
8. What values must be present in my Forum?

Rate from 1-10 the Forum success principles:

Shared vision, purpose and values 1 2 3 4 5 6 7 8 9 10

Confidentiality 1 2 3 4 5 6 7 8 9 10

Commitment 1 2 3 4 5 6 7 8 9 10



# Develop topics (from MTP programme)

- a. Relationships
- b. Aging parents
- c. Raising children with values
- d. Dreams
- e. Life is difficult
- f. Risk
- g. Life's greatest fears
- h. Employee motivation
- i. Discovery questions
- j. Life assessment
- k. Life's walk
- l. Design a topic
- m. Topical discussion



# Develop topics: Relationships

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Develop topics (from MTP programme) Deep dive/Meeting tools</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	

# Develop topics: Relationships

## Step-by-step instructions

### SAMPLE TOPICS

1. Work/life balance
2. Fulfilment and meaning in life
3. Coping with loss (eg, life after divorce, death of family member or friend)
4. Replacing fear with faith and hope regarding illness of self or a family member
5. Defining success (eg, from success to significance)
6. Disappointment and disillusionment
7. Dealing with the challenges of a new workforce (eg, work ethic, commitments, values, motivation and reward)
8. Identifying high-potential people—mentoring and development
9. Aging parents
10. Rearing children

### TOPIC: RELATIONSHIPS

Instructions: Think of someone in your life with whom you have an unresolved conflict or a conflict that you would like to resolve. Then answer the following questions:

1. Who is the person? And what is your relationship to that person?

---

2. Describe the relationship as it is today.

---

3. Describe the relationship as you would like it to be.

---

4. Describe the conflict.

- a. What is the nature of the conflict?

- b. What would it take to resolve the conflict from your perspective?

- c. What do you believe it would take to resolve the conflict from the other person's perspective?

---

5. Call to action:

- a. What action(s) could you take to move the conflict toward resolution?

- b. Will you take that action?

- c. If so, when?

# Develop topics: Aging parents

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.



# Develop topics: Aging parents

## Step-by-step instructions

### TOPIC: AGING PARENTS

Communication starter: Have each member fill in the blank for the following statement.

My greatest fear about aging is \_\_\_\_\_.

Background: Go around and have the members provide a brief overview of their parents' current circumstances.

### Guided discussion questions:

1. What are our responsibilities to our aging parents? Regarding their:

a. Financial needs?

\_\_\_\_\_

b. Physical needs?

\_\_\_\_\_

c. Emotional needs?

\_\_\_\_\_

d. Spiritual needs?

\_\_\_\_\_

2. When you see a need that your parents won't let you fulfil, do you accept it or force your way in? If you step in, how do you do that?

a. How do you negotiate a lifestyle change with your parent?

\_\_\_\_\_

b. How do you handle the role reversal?

\_\_\_\_\_

c. How do you manage aging parents' care long-distance?

\_\_\_\_\_

d. How do you manage sibling relationships?

\_\_\_\_\_

3. What are you teaching your children?

\_\_\_\_\_

4. Are your affairs in order?

\_\_\_\_\_

Close: Read The Wooden Bowl (on next page).

*Continued on next page ...*

# Develop topics: Aging parents - *continued*

## THE WOODEN BOWL

A frail, old man went to live with his son, daughter-in-law and four-year-old grandson. The old man's hands trembled, his eyesight was blurred, and his steps faltered.

The family ate together at the table. But the elderly grandfather's shaky hands and failing sight made eating difficult. Peas rolled off his spoon onto the floor. When he grasped the glass, milk spilled on the tablecloth.

The son and daughter-in-law became irritated with the mess. "We must do something about Grandfather," said the son. "I've had enough of his spilled milk, noisy eating and food on the floor."

So, the husband and wife set a small table in the corner. There, Grandfather ate alone while the rest of the family enjoyed dinner. Since Grandfather had broken a dish or two, his food was served in a wooden bowl.

When the family glanced in Grandfather's direction, sometimes he had a tear in his eye as he sat alone. Still, the only words the couple had for him were sharp admonitions when he dropped a fork or spilled food.

The child watched it all in silence. One evening before supper, the father noticed his son playing with wood scraps on the floor. He asked the child sweetly, "What are you making?" Just as sweetly, the boy responded, "Oh, I am making a little bowl for you and Mama to eat your food in when I grow up." The child smiled and went back to work.

The words so struck the parents that they were speechless. Then tears started to stream down their cheeks. Though no word was spoken, both knew what must be done.

That evening, the husband took Grandfather's hand and gently led him back to the family table. For the remainder of his days, he ate every meal with the family. And for some reason, neither husband nor wife seemed to care any longer when a fork was dropped, milk spilled or the tablecloth soiled.

# Develop topics:

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	

# Develop topics: Raising children with values

## Step-by-step instructions

### TOPIC: RAISING CHILDREN WITH VALUES

Communication starter: The one thing I want most for my children is:

---

---

### Guided discussion questions:

1. What are your five most important values?

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

2. How do you communicate your values to your children?

---

---

3. How do you deal with situations where your children fail to honour your values?

---

---

4. Would your children describe you as someone who "walks the talk"?

---

---

Close: With a word of caution:

### Be careful

Be careful of your thoughts for your thoughts become your words. Be careful of your words for your words become your actions. Be careful of your actions for your actions become your habits. Be careful of your habits for your habits become your character. Be careful of your character for your character becomes your destiny.

# Develop topics: Dreams

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p><b>Step-by-step instructions</b></p> <p><b>TOPIC: DREAMS</b></p> <ol style="list-style-type: none"><li>1. Growing up, did you have a dream for your life? If yes, what was it? _____ _____</li><li>2. Did you follow that dream? If not, what stopped you? _____ _____</li><li>3. Do you have a dream today? If yes, what is it? _____ _____</li></ol>	



# Develop topics: Life is difficult

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p><b>Step-by-step instructions</b></p> <p><b>TOPIC: LIFE IS DIFFICULT</b></p> <ol style="list-style-type: none"> <li>1. What has been the most difficult period of your life?  <hr/><hr/></li> <li>2. What resources did you draw upon to survive?  <hr/><hr/></li> <li>3. What resources were you lacking?  <hr/><hr/></li> <li>4. What lessons did you learn?  <hr/><hr/></li> </ol>	

# Develop topics: Risk

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p><b>Step-by-step instructions</b></p> <p><b>TOPIC: RISK</b></p> <ol style="list-style-type: none"><li>1. What is the riskiest thing you have ever done? _____ _____</li><li>2. How did it make you feel? _____ _____</li><li>3. What did you learn from this experience? _____ _____</li><li>4. What would be a risky thing for you to do at this time? _____ _____</li><li>5. What would be risky for you to do in this Forum? _____ _____</li><li>6. How could the Forum help you in accomplishing what you would like to do? _____ _____</li></ol>	

# Develop topics: Life's greatest fears

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p><b>Step-by-step instructions</b></p> <p><b>TOPIC: LIFE'S GREATEST FEARS</b></p> <p><b>Instructions:</b> Have members list their three greatest fears, the cause or source of those fears and the impact or consequences of holding onto those fears.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• <b>Fear:</b> Not making a difference.</li> <li>• <b>Cause/source:</b> My ego.</li> <li>• <b>Impact/consequence:</b> I am so busy looking for a chance to make a big difference that I miss the little opportunities that are present on a daily basis.</li> <li>• <b>Fear:</b> That something bad will happen to one of my children.</li> <li>• <b>Cause/source:</b> A friend/neighbour's child was killed in a tragic accident.</li> <li>• <b>Impact/consequence:</b> I am overprotective of my children, and they resent me.</li> </ul>	

# Develop topics: Employee motivation

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Meeting tools 1.1</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p><b>Step-by-step instructions</b></p> <p><b>BEST PRACTICES</b></p> <p><b>Employee motivation</b></p> <ol style="list-style-type: none"><li>1. Describe your performance planning and review process. _____ _____</li><li>2. How do you handle employee incentives and bonuses? _____ _____</li><li>3. What employee benefits do you provide? _____ _____</li><li>4. How do you communicate with employees? And what do you communicate? _____ _____</li><li>5. How do you celebrate with employees? And what do you celebrate? _____ _____</li></ol>	

# Develop topics: Discovery questions

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Self-disclosure</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

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## Step-by-step instructions

### DISCOVERY QUESTIONS

1. **Who's who?**
  - a. What do you do?
  - b. Who are you?
  - c. Describe an important person who has had a significant influence on your life.
  - d. Three words that describe you
2. **Dreams**
  - a. Did you have a dream growing up?
  - b. If so, what was it?
  - c. Did you follow that dream?
  - d. If not, what stopped you?
  - e. Do you have a dream today?
  - f. If so, what is it?
3. **Describe what it was like for you growing up.**
4. **Risks**
  - a. What is the greatest risk you ever took?
  - b. What made it so risky?
5. **Describe a missed opportunity in your life.**

# Develop topics: Discovery questions

**6. Joy**

a. What has been the most joyful moment in your life? (exclude marriage or birth of a child)

---

---

b. And what made it so joyful?

---

---

**7. Life is difficult**

a. What has been the most difficult period of your life?

---

---

b. What resources did you use to survive?

---

---

c. What resources were you lacking?

---

---

d. What lessons did you learn?

---

---

**8. What has been your greatest achievement? And what made it so great?**

---

---

**9. What has been your greatest disappointment (or failure)? And what made it so disappointing?**

---

---

**10. Life's fears**

a. What are your three (3) greatest fears?

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b. What is the source or cause of each of those fears?

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c. What price do you pay for holding onto each of those fears?

---

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**11. If you weren't doing what you're doing, what would you be doing?**

---

---

**12. What legacy would you like to leave?**

---

---

# Develop topics: Life assessment

## LIFE ASSESSMENT SURVEY

Date \_\_\_\_\_ Name \_\_\_\_\_

### Instructions

On each of the following items, enter the number that you believe is true for you at this point in your life. If the question doesn't apply to you, skip it.

What is your perception of how you have done in terms of ... 1 to 10 (Low) (High)

1. Finding meaningful and fulfilling work? \_\_\_\_\_
2. Finding a suitable spouse/partner? \_\_\_\_\_
3. Building a successful relationship with your spouse/partner? \_\_\_\_\_
4. Raising your children? \_\_\_\_\_
5. Building and/or maintaining a close relationship with your parents? \_\_\_\_\_
6. Building and/or maintaining a close relationship with your siblings? \_\_\_\_\_
7. Developing close friendships? \_\_\_\_\_
8. Stewarding your financial resources? \_\_\_\_\_
9. Living up to your intellectual potential? \_\_\_\_\_
10. Nurturing your spiritual potential? \_\_\_\_\_
11. Dealing with your fears? \_\_\_\_\_
12. Finding wisdom? \_\_\_\_\_
13. Taking care of your physical health? \_\_\_\_\_
14. Taking care of your emotional health? \_\_\_\_\_
15. Being of service to others? \_\_\_\_\_
16. Being at one with yourself? \_\_\_\_\_
17. Accepting your limitations? \_\_\_\_\_
18. Coming to terms with aging and your own mortality? \_\_\_\_\_
19. Everyone at birth is "dealt a hand," so to speak. Rate the quality of the "hand" you were dealt. \_\_\_\_\_
20. Overall, rate yourself on how well you believe you have played the game of life, given the hand you were dealt.

# Develop topics: Life assessment

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Life Assessment</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

### When to use:

When a member says "I need some ideas on this ..."

### How to facilitate:

- Allow 7-10 minutes
- Introduce the topic to the Forum
- Grab a flip chart and marker
- Start with one idea and run!

### Outside sources:

To discuss things when you can't get the expert in the room, you can utilize outside sources such as books, magazine articles, TED Talks, etc.

### Moderator actions:

- Same setup as topical discussion
- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

### Example topics:

- Let's read and discuss the book *Double, Double* by Cameron Herold
- Everyone share two minutes on the best business book you have ever read
- Check out this great TED Talk that describes me perfectly

### When to use:

When a member says, "I think this topic is interesting to the group, and we can all learn from it."

### How to facilitate:

- Send out books, articles, TED Talks, etc. ahead of time, if possible
- Allow 15-20 minutes in the agenda
- Do you have enough time to watch a full TED Talk in this amount of time, or must it be done in advance?

### Subject matter expert: (internal or external)

We could use some information on a topic that is in the wheelhouse of one of our Forum mates (internal), or an expert you bring in (external).

### Moderator actions:

- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group



# Life assessment - Step-by-step

## Step-by-step instructions

### LIFE ASSESSMENT

The Life Assessment Survey (following page) is designed to gather your perceptions of your life experience so far. It asks you to rate a number of significant variables that are linked to your overall level of life satisfaction and happiness.

On each item, using a 1 – 10 scale (1 being low and 10 being high), rate how you see it right now. Perhaps 10 years ago you would have responded differently or maybe you will see it differently at some future time. Be as honest as you can be. You are doing this for you and no one else, including your Forum members. If you rate an item a "10," you won't have to defend it, nor will you have to defend an item rated a "1." No one will be allowed to try to talk you out of a number. Each of you will be asked to share your responses.

One last thing: some of you may be extremely analytical and may find it hard to come up with a justification for putting down one number. Just go with your gut feeling. No scientific explanation or back-up information is required.

### Instructions for Moderator

Create a flip chart as shown below and transfer members' survey responses to the grid. Ask members to choose up to three areas they rated low as areas to focus on in the next 6-12 months. Members may want to reach out to other members who scored highly in those areas for assistance and support. Commit to a specific time to revisit the survey to discuss and chart improvements.

### LIFE ASSESSMENT SURVEY GRID

1. Finding meaningful and fulfilling work?
2. Finding a suitable spouse/partner?
3. Building a successful relationship with your spouse/partner?
4. Raising your children?
5. Building and/or maintaining a close relationship with your parents?
6. Building and/or maintaining a close relationship with your siblings?
7. Developing close friendships?
8. Stewarding your financial resources?
9. Living up to your intellectual potential?
10. Nurturing your spiritual potential?
11. Dealing with your fears?
12. Finding wisdom?
13. Taking care of your physical health?
14. Taking care of your emotional health?
15. Being of service to others?
16. Being at one with yourself?
17. Accepting your limitations?
18. Coming to terms with aging and your own mortality?
19. Everyone at birth is "dealt a hand," so to speak. Rate the quality of the "hand" you were dealt.
20. Overall, rate yourself on how well you believe you have played the game of life, given the hand you were dealt.

# Develop topics: Life's walk

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Name of exercise	<b>Develop topics (from MTP programme)</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Life's Walk</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate deep dive format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a deep dive. Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

"As a reminder, you will have \_\_ minutes to do your walk no matter how many years you complete. We will ring a bell at the 5-minute mark, the 7-minute mark and at \_\_ minutes. After the third bell, you will have a chance to finish off your current experience ... then you're done. We then ask you to stand in the centre to get feedback from the rest of us who have witnessed your walk. Our comments to you will be something like:

- I see a boy who is sad when his parents divorced at 8.
- I see an adolescent as a model student and a juvenile delinquent.
- I see a young man who cleaned up his act because of a girl and eventually married her.

"An important part of this feedback is that we reflect back what we have seen from the Life Walk, and not project our own stuff on the walker. For example, saying, "I see a man who is going to get through his current crises and have a very fulfilling life" is a projection ... we don't know this. Simply reflect back what we've seen. One of the greatest needs of a human being is to be seen by others for who they are and where they have been, without judgment or projection. That's what we are doing here.

"During the walk, everyone is silent except for the walker. The only exception is that I, the facilitator, may occasionally word coach the participant. Oftentimes, when reliving an emotional event, perhaps the death of a loved one, the Life Walker may revert to the past tense, saying things like, 'I remember ' versus 'I am.' My job is to gently remind the person to stay in the present tense ... reliving the moment.

"That's enough background ... any questions?"

"OK, take a few minutes and prepare your thoughts, remembering that file folders you may not consider now might open when you begin your walk."

# Develop topics: Life's walk

"There is no particular order to the Life Walk ... whenever you're ready, step up behind the birth year, compose your thoughts, and begin your walk. We will begin timing when you begin speaking. Also, if you should encounter a particularly emotional time during your walk, it is perfectly all right to just stand at that time and relive the moment. Our commitment as a group is to honour you as you relive key moments in your life.

"OK, the walk is open."

## Step-by-step instructions

### LIFE'S WALK

In a Life Walk a small-group member is asked, literally, to walk his or her life, sharing experiences at different ages — past, present and future. Ideally, the chairs in the meeting area are arranged in a circle, with rectangles of cardboard, vinyl or wood laid out on the floor. The numbers on the rectangular steps represent ages in a person's life, from birth to age 80, with another (optional) step representing life after death.

The walker stands on each panel and speaks, in the present tense, about what is happening at that stage in his or her life. During the walk, an example statement from childhood might be, "I am 7 years old, and Mom just came into my room to say that she and Dad are getting a divorce. I am feeling ..."

The walker prepares for his or her walk by thinking about the key periods and transitional events in his or her life. Five minutes is sufficient preparation. Notes are not used during the walk. The events that are meant to be spoken will surface at the appropriate age — the participant will know what to say.

### How to introduce the Life Walk to your small group

"The Life Walk is a timed exercise that gives you the opportunity to share important events or transitional times from birth up to [specify an ending time]. A series of tiles are laid out on the floor representing ages of your life. Since the tiles are only shown in five-year increments, you stand somewhere between them to represent ages that are not shown.

"Each of you will be given \_\_\_ minutes (eg, 8) to walk your life from birth to \_\_\_\_. There is no "right way" to do this. Nor is it required that you finish. Some people will only relive events for the first 15-20 years of their life in the \_\_\_-minute period. Others finish a \_\_\_-year Life Walk in less than five minutes.

"We'll give each of you a few minutes to sit quietly, listen to the music and perhaps compose your thoughts of what you might say. However, you won't use any notes during your walk. From our experience, as you stand on the different tiles, 'file folders' in your mind will open up on key events ... which you will then relive during the walk.

"As you walk your life, we ask you to describe events or relationships in the first person, present tense. For example, (this is where the facilitator needs to stand up on the tiles and demonstrate):

- I am 8 years old. Mom and Dad ask me to come and see them in the living room. They are telling me that they are getting divorced and I will be living half-time with Dad and half-time with Mom. I am scared and confused and I don't know what to make of this.
- I am 15 years old and president of the student body. I am living a double life; during the day I am a "model student." But at night I am a juvenile delinquent hanging out with kids from the south side of town. We make Molotov cocktails and throw them at cars. Somehow I am lucky; all of my friends get caught, but I always manage to sneak away.
- I am 23 years old and on a blind date that my roommate set up. My date is the most beautiful girl I have ever seen. We date for four months, then she breaks it off and I am devastated. I don't know what to make of it until my friend tells me she is turned off by my use of drugs. I go cold turkey off marijuana and seek her out for a second chance. We are married five months later.

# Develop topics: Design a topic

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Name of exercise	<b>Develop topics (from MTP programme)</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Deep dive</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate deep dive format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a deep dive. Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.



# Develop topics: Topical discussion

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Deep dives</b>
Time required for this exercise	
Objective of the exercise	<b>Develop topics for your alternate "deep dive" format</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>5% Deep dives work best for topics that are meaningful and unresolved. They tend to deal with questions of "why." Below are a few other ideas with moderator actions on how to create some other discussions in Forum for deep dives of "how," "what," and "when."</p> <p><i>Continued on next page ...</i></p>	

# Develop topics: Topical discussion - *continued*

## Step-by-step instructions

### TOPICAL DISCUSSION

Great topical discussions come in two forms: scheduled and impromptu. They both are facilitated the same way; it's a matter of whether the group knows the topic ahead of time so we might gather additional resources to share with the group in advance, or it just comes out of a "deep dive" or from a subject matter expert. In this tool, we put the topic in the "centre of the table" we openly discuss and idea-generate toward the topic (not a person). Some Forums call this a roundtable discussion.

#### Moderator actions:

- Assign someone to introduce the topic.
- Set a timer for 20 minutes.
- Make sure that everyone has a chance to be heard.
- Assure that the conversation stays on topic and we don't fall in to any rabbit holes.
- Stop when the conversation ends.

#### Example topics:

- Health care and the effect on my business.
- Budget vs. actual and how to guess correctly.
- The best business book.
- Employee handbooks.

#### When to use:

When a member says "How do I do this ... " or "I wish I had more information on..."

#### How to facilitate:

- Allow 20-30 minutes in the agenda.
- Introduce the topic to the Forum.
- Let the conversation roll.

#### Brainstorm:

- Idea generation with a smart group of people can be very valuable for a Forum. The main rule of brainstorming is that there are no bad ideas.

#### Moderator actions:

- All but the asking member participate.
- There are no bad ideas, no one gets to say "I already tried that."
- The goal is to fill as many flip chart papers or white boards as possible.
- One member writes as fast as they possibly can.
- Don't raise your hand, just pile on ideas!

#### Example topics:

- Best place to advertise.
- Ways to motivate my sales staff.

# 15. Content deep dive agendas

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Deep dives</b>
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Deep dives work best for topics that are meaningful and unresolved. They tend to deal with questions of "Why". Below are a few other ideas with moderator actions on how to create some other discussions in Forum for deep dives of "how," "what," and "when."</p>	
<p><b>Step-by-step instructions</b></p> <p><b>Topical discussion</b></p> <p>Great topical discussions come in two forms: scheduled and impromptu. They both are facilitated the same way, it's a matter of whether the group knows the topic ahead of time so we might gather additional resources to share with the group in advance or it just comes out of a deep dive or subject matter expert. In this tool, we put the topic in the "centre of the table" and we can openly discuss and idea-generate towards the topic (not a person). Some Forums call this a roundtable discussion.</p> <p><b>Moderator actions:</b></p> <ul style="list-style-type: none"> <li>• Assign someone to introduce the topic.</li> <li>• Set a timer for 20 minutes.</li> <li>• Make sure that everyone has a chance to be heard.</li> <li>• Assure that the conversation stays on topic and we don't fall in to any rabbit holes.</li> <li>• Stop when the conversation ends.</li> </ul> <p><b>Example topics:</b></p> <ul style="list-style-type: none"> <li>• Health care and the effect on my business.</li> <li>• Budget vs. actual and how to guess correctly.</li> <li>• The best business book I ever read.</li> <li>• Employee handbooks.</li> </ul> <p><b>When to use:</b></p> <ul style="list-style-type: none"> <li>• When a member says "How do I do this ... " or "I wish I had more information on ... "</li> </ul> <p><b>How to facilitate:</b></p> <ul style="list-style-type: none"> <li>• Allow 20-30 minutes in the agenda.</li> <li>• Introduce the topic to the Forum.</li> <li>• Let the conversation roll.</li> </ul> <p><b>Brainstorm:</b></p> <p>Idea generation with a smart group of people can be very valuable for a Forum. The main rule of brainstorming is that there are no bad ideas.</p>	



# Content deep dive agendas

## Moderator actions:

- All but the asking member participate
- There are no bad ideas, no one gets to say "I already tried that."
- The goal is to fill as many flip chart papers or white boards as possible
- One member writes as fast as they possibly can
- Don't raise your hand, just pile on ideas!

## Example topics:

- Best place to advertise
- Ways to motivate my sales staff

## When to use:

- When a member says "I need some ideas on this ..."

## How to facilitate:

- Allow 7-10 minutes
- Introduce the topic to the Forum
- Grab a flip chart and marker
- Start with one idea and run!

## Outside sources:

- To discuss things when you can't get the expert in the room, you can utilize outside sources such as books, magazine articles, TED Talks, etc.

## Moderator actions:

- Same setup as topical discussion
- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

## Example topics:

- Let's read and discuss the book *Double, Double* by Cameron Herold
- Everyone bring two minutes on the best business book you have ever read
- Check out this great TED Talk that describes me perfectly

## When to use:

- When a member says "I think this topic is interesting to the group and we can all learn from it."

## How to facilitate:

- Send out books, articles, TED Talks, etc. ahead of time if possible
- Allow 15-20 minutes in the agenda
- Do you have enough time to watch a full TED Talk in this amount of time or must it be done in advance?

## Subject matter expert (internal or external)

We could use some information on a topic that is in the wheelhouse of one of our Forum mates (Internal) or an expert you bring in (external).

## Moderator actions:

- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

## Example topics:

- A Forum finds that most of the members are without a will or living trust
- Three Forum members have expressed an interest in an acquisition strategy for their companies
- A Forum member is an expert in social media and shares the best practices with Forum

## When to use:

When a member says "I wish I had more knowledge about this and no one has had direct experience in this situation."

## How to facilitate:

- Allow 30 minutes
- SME gets 5-10 minutes to talk about the topic
- Allow 10 minutes for Q&A
- Allow about 5 minutes for the Forum to debrief with a topical discussion

# 16. Strategies for generating great deep dives

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Deep dives</b>
Time required for this exercise	
Objective of the exercise	<b>To create a vision for the Forum moving forward.</b>
Outcome of the exercise	<b>Getting to know each Forum member better in order to create a vision for the Forum.</b>
Tools needed	<b>Whiteboard/flip chart, markers, "Creating your Forum vision" worksheet, timer</b>
Handouts and pre-work if any	<b>"Creating your Forum vision" worksheet</b>

# 16. Strategies for generating great deep dives

## Step-by-step instructions

1. Level 1 deep dives: It all starts with 5% Reflections:
  - a. 5% relevant sharing
  - b. Capture process
  - c. End with: What current problem or opportunity would be of most value to present today?
  - d. Rating process (Covey Quadrant: Urgent vs. Important, or 1 to 10)
2. Parking lot
  - a. Assign a parking lot czar
  - b. Keeps track by Matrix or Covey Quadrant
  - c. Have deep dives scheduled at least three months in advance
3. Level 2 deep dives: Three year goals as planned deep dives  
Take a moment to identify where you want to be in three years, and come up with at least three goals that you need to achieve to get there. Keep in mind your why/purpose.

Painted vision October 2019: \_\_\_\_\_

## Business goals, personal goals, time frame

From the list of goals, which ones would you most like to present to your Forum to solicit their assistance in helping you achieve them? Why?

4. Level 3 deep dives: Self curiosity/realization - Group shared value/depth
  - a. Challenge yourself to find current situations in your life that have real significance for you and that which take you out of your comfort zone. Something you are not willing to share with yourself and avoid any time it comes up.
  - b. It requires courage to share with the group the topics that are closest to you. These are areas where the Forum has the potential to be of most value to you, and for you to serve the Forum at the highest level by sharing most openly about yourself.
  - c. You could start with any challenging issues that keep you up at night.
  - d. Or, if you want, you could share exciting and overwhelming opportunities that you can't share in public.

List at least one:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Ask yourself for each question:

- a. Where do you feel more uncertain, confused or afraid?
- b. How might your own actions be contributing to the challenge you face?
- c. What would failing in this issue mean for you and those around you?
- d. What is your biggest personal challenge in facing this situation? What feelings do you have about the situation?
- e. What is the outcome you hope for? What is your level of confidence right now that you can achieve this outcome (on a scale of 0-100)?

# 17. 13 Forum guidelines

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Forum Starter</b>
Time required for this exercise	<b>5 minutes</b>
Objective of the exercise	<b>To align all members at the beginning of Forum to commit to following these guidelines</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p><b>Description of the exercise</b></p> <p>Read the guidelines out loud and have people commit to them for the retreat or Forum meeting.          Alternate version: Have people comment on each with examples on how they have lived these commitments or a shout-out to another member who has lived these.</p>	
<p><b>Step-by-step instructions</b></p> <ul style="list-style-type: none"> <li>• I will respect confidentiality</li> <li>• I will be present in the moment</li> <li>• I will stay around when times get tough</li> <li>• I will be on time and stay until the end</li> <li>• I will speak my truth</li> <li>• I will ask for what I want</li> <li>• I will take care of myself</li> <li>• I will listen with curiosity and openness</li> <li>• I will own my judgments</li> <li>• I will own my feelings</li> <li>• I will not blame, shame, fix others</li> <li>• I will ask permission before offering feedback</li> <li>• I forgive myself and others for mistakes</li> </ul>	



# Business tools & understanding

# Business tools and understanding

Exercise examples include: elevator pitch, role playing, financial sharing for Forum, one-page business plan, brain writing, etc.

1. Elevator pitch
2. Role playing
3. One-page business plan: Final
4. Financial sharing for Forum
5. The 5 Whys
6. Empathy map
7. Brain writing
8. Pain/gain map

# 1. Elevator pitch

EO chapter	<b>New Delhi</b>
Shared by	<b>Shailja Dutt</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business building</b>
Time required for this exercise	<b>One hour</b>
Objective of the exercise	<b>For each member to make an “elevator pitch” about a fellow member's business to potential leads, partners, etc.</b>
Outcome of the exercise	<b>To help members in your extended network grow their business and brand</b>
Tools needed	<b>Paper and pencil</b>
Handouts and pre-work if any	
<b>Exercise description</b> You will make an elevator pitch about your fellow member's business in 60 seconds. The goal is to grow your network by sharing your USP. Your Forum mates will be encouraged to share your USP as well.	
<b>Step-by-step instructions</b> <ol style="list-style-type: none"><li>1. The group(s) will sit together.</li><li>2. Each member has 60 seconds to make an elevator pitch about their business. The pitch will cover the following:<ul style="list-style-type: none"><li>• What do I do?</li><li>• What geographies?</li><li>• What is my USP?</li></ul></li><li>3. In 60 seconds, you will explain the following:<ul style="list-style-type: none"><li>• Who do you want to meet?</li><li>• With whom do you want to do business?</li></ul></li><li>4. You will select up to two group members to be the spokesperson for the business. The members will repeat the pitch.</li></ol>	
<b>Debrief questions and notes</b> All members must participate and should be able to explain their business USP within two minutes. <b>Options:</b> To prepare your pitch, you may receive the exercise in advance.	

## 2. Role playing

EO chapter	<b>Boston</b>
Shared by	<b>Praveen Ramanathan</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Alternate deep dive</b>
Time required for this exercise	<b>30-40 minutes</b>
Objective of the exercise	<b>To understand another person's perspective and feelings</b>
Outcome of the exercise	<b>To understand another person's perspective and feelings in a conflict situation</b>
Tools needed	<b>None</b>
Handouts and pre-work if any	
<p><b>Exercise description</b></p> <p>The exercise involves two Forum members. Let's say Forum member A raised an issue: "My dad is 75 years old and he still is involved in the business. I want him out of the business, which will allow me to take over and run it by myself. The thought of pushing my dad out of the business makes me unhappy."</p> <p>In this exercise, you will play the following roles:</p> <ul style="list-style-type: none"> <li>• Forum member A will play the role of the dad.</li> <li>• Forum member B will play the role of the son.</li> </ul>	
<p><b>Step-by-step instructions</b></p> <ol style="list-style-type: none"> <li>1. Forum member B will start by describing the situation and lay out the issue at hand.</li> <li>2. Forum member A will play the dad and issue a response.</li> <li>3. The dialogue continues until the two members (or the Forum) feels it is time to stop the role playing.</li> </ol>	
<p><b>Debrief questions and notes</b></p> <p>Forum member A will debrief and describe what it felt playing the dad role. Forum members can comment and share their perspectives on the exercise.</p>	



# 3. One-page business plan

EO chapter	<b>South Florida</b>
Shared by	<b>Cesar Quintero</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business tools</b>
Time required for this exercise	<b>30 minutes per member</b>
Objective of the exercise	<b>Completed business plan</b>
Outcome of the exercise	<b>To prepare a business plan</b>
Tools needed	<b>Complete the one-page business plan</b>
Handouts and pre-work if any	

## Description

This is a one-page business plan. If you plan to grow your business, you have to start somewhere. Where is your business today? We encourage you to take some time to outline your strategy.

## Goals

State your primary, overall goal and include one or two key, company-wide performance objectives. Think long-term (a minimum of three years).

## Unique differentiator

Provide a short description (25 words or less) of your niche; the thing you do differently or better than anyone else. Consider describing it from your customer's viewpoint.

## Customer

Identify your target customer.

## Purpose

How do you serve your target customer?

## Strategy

Determine where the company needs to go and how everyone will help achieve its objective. Note: Focus on a long-term strategy here, not a short-term tactical plan.

## Relevant stats

Number of customers, number of employees, revenue, profit margins, length of sales cycle, NPS score, etc.

## Business lifeline

Think of your business from the time you started it or took it over. What events have shaped it into what it is today? Then, you will brainstorm two key highs and lows impacting the growth of your business on the graph below.

## Today's date

## Company start date

**Options:** You may ask clarifying questions. However, please try and avoid using "why" when asking questions.

# 4. Financial sharing for Forum

EO chapter	<b>Chicago</b>
Shared by	<b>Todd Smart</b>
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business tools</b>
Time required for this exercise	<b>10 minutes preparation time, 10 minutes sharing time (per person)</b>
Objective of the exercise	<b>Financial reflections and insight</b>
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

## Step-by-step instructions

- What does your business do?
- What are your top three differentiators?
- How do you make money?
- When did your business start?
- What was your revenue last year? What are you on track to gross this year? Your growth rate or percent change? Say something more about your growth plans and why you think they're achievable.
- How are you planning to scale your business? Why are you going to grow?
- What percent of the business do you own?
- What was your taxable income for the last three years (approximately)? Explain.
- Do you have a working spouse? What do they earn and how does this impact your choices as an entrepreneur?
- List any other income (ie, alimony, child support, grandparents paying tuition etc.)
- How much you saved last year before or after taxes?
- What are your savings goals this year?
- What are your approximate monthly personal/family expenses?
- Do you have a family budget or spending plan? Talk about successes and failures with this plan.
- Do you teach your children/spouse about money? If so, how are you teaching them?
- What is your net worth (assets minus liabilities) and how much has it increased or decreased the last couple years? What are the three biggest contributors to your net worth?
- What is your net worth goal? When do you imagine achieving this goal? How are you going to achieve this goal? Explain your motivation for reaching this goal.
- Do you have expected financial windfalls in your future? Are you expecting an inheritance, trust, settlement, sale of an asset or business to impact you financially? If so, how much money are you expecting and when will you receive it? How does this impact your financial planning?
- What do you invest in? Please break down your investments by percentage (eg, real estate, stocks, bonds, alternative investments, angel investing, etc.)
- Share your best tax strategy tip.
- What are you going to do with your money when you die? Why?
- Which of these questions makes you most uncomfortable? Why?

**Option:** Send out the questions in advance.

# 5. The 5 whys

EO chapter	
Shared by	
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business</b>
Time required for this exercise	<b>1 hour</b>
Objective of the exercise	<b>This brainstorming activity is designed to help you uncover the root causes behind the problems you are facing in business.</b>
Outcome of the exercise	<b>Identify focus areas in business</b>
Tools needed	<b>Sticky notes and pencil</b>
Handouts and pre-work if any	
<p><b>Step-by-step instructions</b></p> <p>To play, you must first identify a problem that you need to evaluate in your business. Then, you will take five sticky notes and number them one through five. Next, you will answer the following question: Why do I have this problem? This answer goes on sticky note one.</p> <p>You will then ask why the answer on sticky note one is true. This answer goes on sticky note two. Then, you will ask why the answer on sticky note two is true, and then write the answer on sticky note three. Repeat until you have used all five sticky notes.</p> <p>When you are finished, you will create five columns on a whiteboard. At the top of each column, you will write the question "Why?" and place the sticky note answers in a row. Review the answers.</p> <p>Hopefully, this exercise will help you identify key areas of improvement. If not, you can repeat the process again until you have a clear answer.</p>	

# 6. Empathy map

EO chapter	
Shared by	
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business</b>
Time required for this exercise	<b>1-2 hours</b>
Objective of the exercise	<b>To identify your ideal customer</b>
Outcome of the exercise	<b>To enhance interaction with your ideal customer</b>
Tools needed	<b>Paper, white board and pencil</b>
Handouts and pre-work if any	

## Description

A common goal for annual sales and marketing team meetings is to set the go-to-market strategy for the year, and to develop detailed sales and marketing plans. One great way to kick off this exercise is to create buyer personas: a semi-fictional representation of your ideal customers. An empathy map is a great visual way to kick off this process and get your team's creative juices flowing.

## Step-by-step instructions

You will create a circle on the whiteboard and label it with the name of the person you are focusing on (you can turn the circle into a head if you'd like). Then, label areas around the head with the following words:

- Thinking
- Seeing
- Hearing
- Feeling
- Doing
- Saying

Next, you will describe the person's experience and repeat the process for each of the six categories. By the end of the exercise, you would have developed a certain degree of empathy for the individual in question, which will help identify the person's motivations.

By asking questions such as, "What would the customer want?" or "What would the customer think about this?" you can re-evaluate the message to make sure you are on the right track (eg, a marketer might ask, "Is this the kind of content that our customer wants to see?" or a salesperson might ask, "Knowing how busy our target customer tends to be, maybe we need to rethink our outreach strategy.").

This exercise should only take 10 to 15 minutes for each person.

# 7. Brainwriting

EO chapter	
Shared by	
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business</b>
Time required for this exercise	<b>30-45 minutes</b>
Objective of the exercise	<b>Create ideas</b>
Outcome of the exercise	<b>Diverse ideas</b>
Tools needed	<b>Paper and pencil</b>
Handouts and pre-work if any	
<b>Description of the exercise</b> One of the benefits of working in groups is the opportunity to share different perspectives and worldviews.	
<b>Step-by-step instructions</b> To play, you will identify a topic of interest (eg, increasing audience engagement). Then, you will ask each member to take an index card and write down ways of handling the situation. Each team member will pass the card to the person on the right, who will explain the initial idea. You will pass the card around until each team member has had the chance to read and comment on the index card. The group will evaluate the ideas to identify which ones are actionable and worth pursuing.	

# 8. Pain gain map

EO chapter	
Shared by	
Type of exercise (icebreaker, team-building, closing, etc)	<b>Business</b>
Time required for this exercise	<b>10-15 minutes</b>
Objective of the exercise	<b>Exercise to help identify a marketing strategy</b>
Outcome of the exercise	<b>Improve sales</b>
Tools needed	<b>Paper, and a pencil</b>
Handouts and pre-work if any	
<p><b>Description</b></p> <p>Most decisions that people make are choices between something that will benefit them and something that will harm them (even if they don't realize that the trade-off exists). Knowing what this trade-off looks like for potential customers can help inform their selling and marketing strategies.</p>	
<p><b>Step-by-step instructions</b></p> <p>To play, you must first identify the person you are evaluating (say, a customer or end-user of your product). Then, you should identify the "pains" that may drive the person to become a customer, or otherwise seek out your product or service:</p> <ul style="list-style-type: none"> <li>• What are they afraid of?</li> <li>• What is he responsible for?</li> <li>• What obstacles does he face?</li> <li>• What keeps him awake at night?</li> <li>• What does a particularly bad day look like to him/her?</li> </ul> <p>Then, identify the positive things that may drive the person to seek out your company:</p> <ul style="list-style-type: none"> <li>• What does he want to gain?</li> <li>• What can you offer them to reach their goals?</li> <li>• How can this person benefit from your product? etc.</li> </ul> <p>By framing your understanding of key buyer personas in this way, you can better frame your outreach and workflows.</p> <p><b>Option:</b> You can complete this individually, or as a Forum to diversify the responses.</p>	