

## **Camille Burns, Chief Executive Officer**

Hi everyone, Camille here with a quick update ahead of Monday's Town Hall.

- We're trying a new format! You'll get this short video in advance so we can keep the town hall shorter and spend more time in conversation and Q&A. We want to take advantage of having the group together and use your time more effectively—knowing how busy you are.
- First, you'll hear briefly from me about the bigger WPO picture. Then Kirsten will talk about the Forum, and Judy will cover CC training and new processes and clarify roles.
- On Monday, we'll open with Q&A—whether it's about this video or anything else you want to ask or share.
- We know it's a very uncertain time for many business owners. It can be tough for you as Chairs too. One goal for the town hall is to create more space for interactive conversations—especially around how we support members as leaders while steering clear of tricky topics.
- Monday is a great time to check in with each other, ask questions, and share ideas—not just about WPO, but anything on your mind.

### Quick Org Updates:

- 2024 was financially strong and we're working to tighten processes even more for 2025.
- We brought on a fractional CFO and are revamping our accounting—working on invoicing, dues, and renewals. The goal is more automation, fewer collections, and less for you to handle!
- We're also improving our data. You may have seen Sara's email—please encourage members to update their profiles. This helps us make smarter decisions, better understand our members, and gather valuable information we can use to demonstrate the impact of WPO. Your support in reminding members to do this—whether in meetings or emails—is really appreciated.

### Staff Reminders:

- Dawn O'Connor continues as our Learning & Development consultant, leading training. She's happy to help with chapter or member issues—but for WPO-related questions, go to Judy or Tomi Jane.
- Anni Wilhelmi is focusing on global growth with me.
- Valeria Rodriguez Codina is growing the Iberia region.

### Chair Transitions:

- We have a few important transitions happening with our Chairs.
  - After many years leading Tampa Bay, Lynda McDermott has stepped down. Roz Alford will be stepping in to relaunch the chapter later this year.
  - Vicki Unger has stepped away from her Los Angeles groups. Longtime member Sonya Shelton will take over Los Angeles II.

- Anni Wilhelmi is stepping away from her local chapters, and keeping her Platinum VII chapter. Longtime member Anne Hartsliet is becoming a Chapter Chair of her Cape Town I & II chapters. Current Chapter Chair, Judy Sunasky is inheriting her Johannesburg I chapter.
- Lastly, Tina Meilleur is stepping down from New Orleans in June. Laila Morcos Zissis will be the new chair.
- You'll have an opportunity to meet both Anne, Laila, and Sonya in May!

#### New Chapter Launches:

So far this year, we've launched:

- Madrid
- Orlando II
- Calgary V
- Edmonton III
- Minneapolis VII
- Austin III
- Miami

Some new chapters in the process of starting:

- A Coruna
- San Antonio
- Denver III
- San Fernando Valley
- Mexico City
- San Miguel

Big Picture: This is a volatile and challenging time in business. But it's also when WPO matters most. Supporting each other, strengthening our community, and finding opportunity in uncertainty—that's what we do best. And your leadership makes all of it possible. I'm so grateful for all that you do. Can't wait to see you on Monday!

Now I'll hand it over to Kirsten and Judy for their updates.

#### **Kirsten Wynn, Chief Innovation & Programming Officer**

Well, howdy, Chapter Chairs. I'm here with a video to get you excited for the upcoming Entrepreneurial Excellence Forum (EEF) in San Antonio, Texas.

So, first, why is this a forum and not a conference? We see conferences as on a topic or theme, and a forum is an exchange of ideas. So, this is a forum. Now, we will be May 7th to 9th at the Hyatt Regency Hill Country in San Antonio. This is San Antonio, but it's hill country, so think more rolling hills and golf courses.

Now San Antonio will be warm. We are about 150 miles, or 240 kilometers from the Mexico border, and we will be having events outside. There will always be shade, but wear that sunscreen. Now, let's get into the forum. Before things even start on Wednesday afternoon, there is a lot of activity. As you all well know, there is an extended Chapter Chair training, so you will be warmed up and ready for those members when they get there on Wednesday.

Now, on Wednesday morning, there is an offsite option - getting you off-site and getting you out of the hotel. There's also the annual meeting, and then we get into some pre-forum workshops. You'll hear later from Kim Folsom about something we're working on with a pitch contest that could be really exciting. So you'll hear more on that later. Now, there's other pre-forum workshops, including one on genetic health, which I think is going to be really interesting.

So that afternoon, we kickoff the conference with keynote Cassandra Worthy. Cassandra is a change enthusiast and provides the framework to transform fear of change into fuel.

After that we have a few breakouts that are really focusing on a VUCA world. We know what the world is going through right now, so we wanted to take the time to acknowledge that and provide some insight. So there might be a panel on mental health in a VUCA world; there might be a panel on business growth in a VUCA world; and others so get ready for that. After that we've got Sip and Shop. That is your reception and your opportunity to really visit those vendors and do some shopping.

After that we are aware of the limitations of food outlets on site. We are going to be providing buses going to the river walk that evening. This is Wednesday evening, so we'll have buses going to the river walk. This is your opportunity to get out of the hotel. Get to the river walk, enjoy some San Antonio food

Thursday morning we've got jazzercise with the founder of Jazzercise. It's led by Judy Shepherd Misset, so that's a lot of fun. We'll also have some lower impact activities as well, so don't worry if Jazzercise isn't your activity. Thursday morning we've got a keynote, Dan Heath. He is the author of the book, *Reset: How to Change What's Not Working*. Dan is a fellow at Duke University's Center for Advancement of Social Entrepreneurship, and an author many, many times over, so he'll be really great. After that, you've got some workshops. You've got hard, hitting workshops here. These are going to be excellent.

So you got Allison Maslon - Allison is a serial entrepreneur many times over, and she currently leads the Pinnacle Global Network. She's going to be talking a little bit about leading companies. You got Casey Brown. Casey Brown is a pricing expert. She helps entrepreneurs find their power through pricing. I've seen her change revenues in 5 min for members. So that's really really cool.

Geoff Woods leading an AI workshop, but not the typical AI workshop. He doesn't work on tactics and tools. He works on using AI and leveraging AI as a strategic partner for your leadership so really targeted to CEOs, not going into the ChatGPTs of the world. Really more of how CEOs need to be leveraging AI

Shannon Susko of Metronomics is coming. Metronomics is a system, a business growth system that really brings together a lot of different systems that she's researched into one comprehensive system. She's going to be great. WPONext has a workshop, and of course we'll have women's health.

So that afternoon we've got 50 Fastest. I don't know what that program looks like right now, because we don't have winners yet. We are in the fact-check process there. So I will keep you posted. But these companies look amazing so far.

After the 50 Fastest, you've got workshops repeating, and then that evening we will have a toast to the Women of Impact in the JPMC lounge. So that that's the program we do for women of color who are really making an impact in their business, but also their communities. We will recognize the winners from last year, but we're also going to launch the application for next year, so join us for a toast in the JPMC lounge on Thursday evening. Now, after that we've got the party.

So the party theme is Hill Country Chic. So think Southern charm. I expect to see a lot of hats, a lot of boots, a lot of jeans. There will be food. Of course there will be dancing. Of course there could be some line dancing. There might be some activations, maybe some hair tinsel. There could be an animal or 2. So I'm working on some things there. But it's going to be a lot of fun. Wear your boots, wear your hats, wear your jean jackets, come and dance. It will be outside.

So that's Thursday night. Friday morning - we are going to wrap up the forum with a keynote and some member workshops. We've got some Member workshops lined up, including one on Gen. Z. So instead of her coming in and talking about what Gen. Z is looking for, she actually sources Gen. Z participants to come in and be on a panel, so it'll be a really great workshop on what Gen. Z is looking for. And again, we've got that keynote.

We will have that keynote and a performance piece that I'm not releasing just yet, and then we'll wrap up, announce next year's forum, and we'll be done by noon. So that's the forum.

That's a bite size, bit of the forum. Of course there's a lot going on behind the scenes, so we've got a lot to do. And I'm really excited to see you there. Thanks, guys.

### **Judy Waak-Pearce, Director of Customer Engagement**

Hi everyone. Thanks so much for joining us today. I want to take just a minute to thank each of you for your time and energy for getting to know me this year and getting to know me. Hearing about your chapters and how we continue to have successful chapters has been such a joy for me.

I am here to support you with chapter challenges, member challenges, and with sponsorships, as we continue to utilize our sponsors on a local level and get them involved in chapters where appropriate. I really appreciate the time that I have had to join you for some of your chapter meetings, recruiting events, and just conversations with each of you hearing how you are growing and how we can help.

I want to take just a moment to tell you that in the future I would love to join your chapter meetings. This is one of my goals is to continue to attend meetings to get to know each of your members individually just a little bit better and how we can continue to support, but also improve upon what we deliver to our members.

Tomi Jane is also here to continue to support you as she has in the past. Her vast experience with each of your individual chapters is so valuable to me and I know she will continue to be there for each of you as well.

As Camille mentioned, Dawn O'Connor will continue to work with WPO through 2025, as we continue to create new content and improve upon content that we already have available for you. She is here to answer any questions on that content and how best to deliver the content to your members. If you have suggestions on content, we are always here to hear about that. Our goal is to make it available to you in order to help your chapters.

We are really excited to roll out at the forum the new WPO model. We worked on this very closely and tested it with some of our chapters. We heard feedback from Chapter Chairs on how to improve certain documents. We have made those edits and are so happy to hear in the last month from multiple Chapter Chairs that the

members are very excited about this. They love the new content and the new way of extracting information from them. It is benefitting them and benefitting the chapter. We are really excited to roll this out to everyone in May. We look forward to seeing you there.

I would also like to remind you on the April 3<sup>rd</sup> training. Tomi Jane is working on that with our operations team and Sara and Tomi Jane will be leading this training.

I look forward to seeing you. I want to thank you for your time today and we look forward to seeing you on Monday. Have a great weekend. Thanks so much.