WPO Member Update Template – How to Guide for Chapter Chairs

Below is a sample of a completed 'WPO Member Update' template, and a set of instructions to help you guide your members through the New WPO meeting model.

Facilitation Tips:

- Try filling out the form yourself, so that you can relate to the members' experience.
- Print a blank form or complete it online (it is a Word doc).
- Send it out to members with the agenda for each monthly meeting. Or store it in your chapter section of the portal.

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COMPLETED SAMPLE: WPO Member Monthly Update (today's date: *May 5, 2025***)**

Facilitation Tip:

Encourage members to keep their monthly updates as a reference tool - like a 'business journal'. They can store updates electronically or in a binder. It will help them appreciate their growth and accomplishments. At year-end, the saved forms can serve as a useful tool for reflection activities. As Chairs, please do not collect these updates or have online access to them in any form, since it is a liability. Instead, encourage members to manage their own update forms.

Template for Members:

*Please complete this from the perspective of your **whole self -** business, personal, family - sharing what is most meaningful to you. Focus your update on how these events have made you **feel** and what impact it has had on you, your business, and your life.*

How I feel in this moment: *Content* **What I am grateful for:** *new CFO*

Headline: *Use succinct bullet points in each section, focusing on the most impactful events.*	**Meaning & Emotions:** *How are you feeling about each point? What is the impact on you or your business? Focus on the **significance** vs the story.*
High Points (Business, Personal, Family Celebrations)	
We found a wonderful new candidate for our CFO role	*Our reputation in our industry is so strong that we were able to attract stellar candidates. I am proud of our years of effort and focus on culture. I am a bit anxious about opening my books to the new CFO, but I know we need this expertise to help us get ready for future sale.*
My son is going to Uni in Switzerland on scholarship	*I am so proud of his achievements, but I will sure miss him. It also leaves a small hole in our team since he was doing our social media and some admin support. I am debating if I need to hire to fill the gap.*
Challenges (Business, Personal, Family Challenges)	
Poor performance of key sales person.	*If I lose him, the burden will fall on me and I am not prepared to step back into that role. I want to understand the root cause of the issue so I can coach him back to higher performance. But instincts tell me he is already looking elsewhere. I worry about impact on the team. This is significant because of the toll it could take on me, not to mention reduced revenues.*

Overall work life balance is out of whack	*I am still working too many hours…partly to avoid my husband. I am not sleeping enough, so my fatigue is compounding the issue.*
Opportunities / Possibilities (What potential exists? What is the benefit/opportunity cost to pursue?)	
Possible buyer	*A semi-competitor has approached us to open discussions on possibly selling a portion, it not all of the business. I feel ready for this on many levels, but also terrified.*
What financial metric are you most proud of this month? *We made good strides in moving to an open-book management approach. Most staff seem to appreciate learning about our numbers and how they can contribute.*	
What are you tolerating? What has tested your patience? *Husband's role in biz. If he were an employee and not my husband he probably would have been fired by now.*	
The most meaningful challenge or opportunity I need help with this month is… *Possible sale – this is new to me and I would love insight on what to expect and how to navigate & negotiate.*	

Facilitation Tip:

All of the above should be shared in a 3-5 minute update to start the meeting. While it can be difficult for some members to be succinct, it is a practice in concise and clear communications.

The last section of the template below is best shared at the end of the meeting.

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NOTE: Save the 'Meeting Close & Commitments' section for the end of the meeting, allowing 10 – 15 minutes to hear each member share an update from last month, and what they commit to for next meeting.

Meeting Close & Commitments: Looking forward to the next month, I would like to be held accountable for… (use SMART criteria – Specific, Measurable, Actionable, Realistic, Time-bound)

Commitment from last month: *Finished org chart development and shared with team – success!*
Commitment for next month: *3 X per week of a total of 7 miles…working up to 10 miles in week 3.*

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Facilitation Tips:

How and When to Complete the Form:

- Encourage members to complete the entire form before arriving to the meeting. Alternatively, give them 10 minutes at the start of the meeting to fill it in.
  - It takes time and deep thought to complete the form thoroughly.
  - When done well, it allows members to go deeper, surface more challenges and opportunities, increase vulnerability, and build trust.
- In order to keep updates short and meaningful, remind members to stick to a 'Headline vs Story' approach. The emphasis should be on the significance and impact of the event vs telling a lengthy and detailed story.
- While members are encouraged to complete the entire form, they may only have time to share a few of the sections depending on how succinct they are. Direct them to spend time sharing the areas that are most important to them. Be sure to honor the time allocation (i.e. 3-5 minutes per person).

Facilitation and Meeting Management:

- Follow a 'round table' approach (i.e. go in a circle) for Member Updates, so that everyone is clear on the order.
- Use a timer and limit updates to 3-5 minutes depending on the size of your chapter. This ensures that updates are equitable and focused.
  - To figure out the total time allocation for Member Updates, multiply the number of attendees by the time allocated (i.e. 3 min). Then ADD one min per person, since you will likely need a little time after each update to check in on possible topics (i.e. 15 X 3 min = 45. PLUS 15 min = total of 60 min).
- Discourage interruption or group discussion during updates. It is an opportunity for each member to have a focused and attentive audience.
- As the Facilitator, always be alert for issues or opportunities to process – these may crop up in any of the sections.
  - Remember to prompt members to share their financial metric, and what they are tolerating, as well as identifying their meaningful challenge, as any of these could reflect an important topic to work on.
- The 'Commitments' section is best left to the end and is a great way to close-off the meeting. Feel free to capture their commitments and refer to them the following month as needed.
- Start and end meetings on time. Consider asking the last member to arrive to be the 'note taker' (i.e. capture questions during the Question round).

Recommended Facilitation Tools:

1. Provide **name tents** to support members to get to know each other. Include their Predictive Index profile if available.
2. Use an **audible timer** to help you stay on track with timed updates (3-5 minutes).
3. Pass around a **Post-It Note** pad and ask members to note their issues in their own words.

4. Use an **Eisenhauer Matrix** to help with issue selection.
5. Be sure to read and follow the best practices of the Spark Kit: **Dynamic Duo – The Art of Excellent Questions and Experience Sharing.**

Next Steps in the Meeting Model Process:

1. **Issue Selection** – Once all members have shared their update, you will need to narrow down the issue to focus on. Encourage members to stick their post-it on an Eisenhower Matrix. Members may either vote by noting initials, or use a check-mark on their preferred topic. Alternatively, you could facilitate a group discussion to select 1-2 issues to work on.
   a. If you are hosting virtually, you can ask for commentary in the chat or set up a quick voting poll.
2. **Issue Presentation** – Once the issue is selected, the member completes Part I of the Presentation Guide template.
3. **Question Round** – All members have an opportunity to ask open-ended, divergent questions. The intent is to gain clarity, prompt the issue holder to consider new ways of approaching the issue, and help her move closer to solutions or new ideas.
4. **Experience Share** – All members may share a relevant experience to help the issue holder see alternative approaches to her challenge. Please avoid advice giving or "If I were you, I would" scenarios. *
5. **Reflection** – The issue holder may refer to Part II of the Presentation Guide to offer what resonated for them, and how they plan to apply their learning. It can be quite powerful to have the issue holder share a future vision of what success looks like – ie.1 month from now, and longer term as well.

*Why we AVOID Advice Giving:

1. Advice can feel like a form of judgment vs support. Offering advice can imply that you know more than the person with the issue, which can make the listener feel like they are being condescended to.
2. Advice giving can be a shield to hide behind vs being vulnerable and sharing a genuinely challenging situation you have experienced.
3. Consider how you might feel if the advice you gave is implemented, and it does not yield a good outcome.
4. Advice giving can become competitive amongst members to see who can offer the best solution.
5. We need to be careful not to burden specific members to provide free advice during meetings – i.e. lawyers, HR consultants, Insurance advisors etc. may be most prone to the demands for direct advice.
6. Listeners generally respect experience more than advice, even when they beg for advice. When we receive direct advice, our brain quickly releases cortisol and can be resistant to onboarding that advice. Also, the receiver may feel more pressure to act on advice and possibly go against their own judgment.
7. The meeting model is built on peer coaching, inquiry and support, not on advice giving.