Facilitating Member Journey Conversations in Your Forum

Fostering member value check-ins with ALL members each year
A key goal for EO chapters is to set up a system of conversations so that all members, regardless of tenure, have a check-in conversation each year about how their member journey is going—what they have already taken advantage of and what further journey-step opportunities are open to them. The EO Member Journey Guides should be a key resource for such conversations (download through the link).

Interviews have shown that many members who have had a long and varied journey through EO share a common thread—at some point in their membership, one person had a conversation with them that started them on their successful journey. One Member Success initiative approach is a call to action for the “connectors” in EO to hold such inspiring conversations with their colleagues. Forum provides a powerful platform for members to be exposed to connector stories and promote accountability for providing and receiving such guidance.

Among the Forum opportunities identified to have these conversations:

- A regular Forum meeting (~30-45 minutes)
- A Forum Health Workshop (~1 hour or less)
- A Forum retreat (~90 minutes or less)

**Forum Exercise Option 1**

*Exercise time: 30 - 45 minutes
Recommended Frequency: Once per year to take the place of one presentation spot*

1. The Forum Moderator serves as the exercise leader, or the moderator delegates that role to another Forum member skilled in facilitating conversations.

2. About a week before the session, the exercise leader emails a copy of the Member Journey Guides to Forum members and asks them to do a quick overview of the EO journey possibilities, reflecting on what journey steps they have already completed and to think about what entrepreneur and personal challenges they seek to overcome at that moment.

3. At the Forum meeting, the exercise leader uses the following conversation starters:
   - “What was an EO moment that changed you for the better?"
   - “What experience or period of your membership made you feel like you had received outstanding value?”
   - “What moment triggered a period of growth for you?”
   - “What is your favorite EO memory, moment, or experience?”

4. Participants take two minutes to think about it and jot down notes.

5. The exercise leader goes around the table in round robin fashion and everyone experience shares.

6. When questions arise about particular programs that no one in the Forum can adequately answer, the exercise leader refers the member to the appropriate chapter officer for more information, such as the Learning Chair, the Forum Chair, etc.
7. With the goal of every Forum member being exposed to 7-10 high-impact EO experiences from other members, participants pick and choose what they want to do next in their own journey.

8. Everyone writes down one action to which they will commit between now and a future point in time to elevate their EO experience, using the Member Journey Guides as a reference if needed. (The future point in time can be determined by the group.)

9. The exercise leader collects the commitments.

10. Mid-way through the agreed-upon time period, the exercise leader sends reminders to the Forum members about their commitments.

**Forum Exercise Option 2**

*Exercise time:* 30 - 45 minutes  
*Recommended Frequency:* Once per year to take the place of one presentation spot

1. The Forum Moderator serves as the exercise leader, or the moderator delegates that role to another Forum member skilled in facilitating conversations.

2. About a week before the session, the facilitator emails a copy of the Member Journey Guides to Forum members and asks them to take a few minutes to:
   - Print out the guides
   - Go through the pages that show the individual four graphic journeys (pages 3, 5, 7, and 9) and check off what steps they have already completed on each journey. (The exercise leader also checks off his/her journey guides in the same way.)
   - Bring those copies to the upcoming Forum session.

3. Before the meeting, the exercise leader finds his/her journey that has the most completed steps checked off.

4. At the meeting, the exercise leader shares why he/she has been active in that journey and which of those steps were the most rewarding and why, soliciting questions.

5. The exercise leader asks if someone else in the group also had the most steps checked off for that particular journey. If there is someone, that member shares what steps had the most value for them and why.

6. The exercise leader then asks for a similar round of sharing with the other journeys, hearing a few examples of the members’ top experiences, soliciting questions.

7. The exercise leader can then ask a number of conversation starters to stimulate more journey advice and direction, such as (and certainly not limited to):
   - “Has anyone felt that the value they are receiving from EO has slowed down recently?”
     - “Is anyone wondering whether they still have a long future in EO?”
     - If someone is searching for new things to do in EO, they can be pointed toward steps in one of the 4 journeys that they have not been active in.
   - “Who had an EO experience in the past year that was especially surprising and valuable?”
• “Has anyone had a conversation with a colleague that inspired them to change their EO journey direction for the better? What did you hear from that colleague?”

8. When questions arise about particular programs that no one in the Forum can adequately answer, the exercise leader refers the member to the appropriate chapter officer for more information, such as the Learning Chair, the Forum Chair, etc.

9. Everyone writes down one action to which they will commit between now and a future point in time to elevate their EO experience, using the Member Journey Guides as a reference if needed. (The future point in time can be determined by the group.)

10. The exercise leader collects the commitments.

11. Mid-way through the agreed-upon time period, the exercise leader sends reminders to the Forum members about their commitments.