

New Chair Success Path: Build & Leading a Thriving Chapter

Purpose: This is your guide to help you build and lead a successful WPO Chapter. Keep it handy - flag in your email, or store in a WPO folder for quick reference.

Your Mission: Onboard 15 members in 15 months to form a vibrant, diverse and successful chapter of qualified entrepreneurs.

Phase 1: Introduction to WPO

★ **Goal:** Understand the WPO mission, support tools, and your role as Chair.

	Key Steps – Introduction to WPO	Resources
<input type="checkbox"/>	<p>Welcome! Meet with your Region Lead and Judy to get clarity on next steps for your transition or chapter launch. This gives you momentum, support, and an early view of what success looks like. Review Onboarding Package from Head Office.</p>	<p>Judy + RL</p> <p>Chapter Chair Manual (PW: CCManual23)</p> <p>Quick Reference Guide</p>
<input type="checkbox"/>	<p>Systems Setup: Set up your lead tracker (spreadsheet or CRM), WPO email address (optional)/signature, and vendor accounts like Bill.com. This makes admin smoother, so you can focus on connecting with prospects.</p>	<p>Chapter Chair Onboarding (PW: CCOnboarding23)</p> <p>Brand Style Guide</p> <p>WPO Signature Template for Chapter Chairs</p>
<input type="checkbox"/>	<p>Onboarding Check Ins: Schedule Onboarding Check Ins for next few months with Head Office and your Regional Lead. Two of the Head Office trainings will cover the Membership Application Process and the WPO Member Portal + CC Online Resources.</p>	<p>Tomi Jane + RL</p> <p>WPO Application Journey</p> <p>Chapter Chair Hub</p>
<input type="checkbox"/>	<p>Attend Introduction to WPO: Participate in a 90-minute WPO Orientation (live or recorded) to learn about our values, brand promise, and your role.</p>	<p>Annual Training Calendar</p>
<input type="checkbox"/>	<p>WPO PeerView™ Intro: Watch a recorded WPO PeerView™ session or attend a virtual training. Gain confidence to describe the magic of WPO meetings. Review How to Guides for step by step instructions.</p>	<p>WPO PeerView™ Facilitation Guide (PW: PEERVIEW25)</p>

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<input type="checkbox"/>	Shadow a Chair: When possible, observe an accomplished Chair. You'll see WPO PeerView™ in action and gain facilitation tips that can't be learned from a PDF.	Judy / RL conduct intros and help coordinate
<input type="checkbox"/>	Draft your Launch Plan: With help from Judy and your RL, map out your first 60 - 90 days. A strong plan builds clarity and accountability.	Head Office to provide curated list of potential candidates.
<input type="checkbox"/>	Sponsor Connect: Explore options for a venue sponsor or recruiting event host. A great partner elevates your event and lightens your load.	Judy / RL conduct intros and help coordinate

 **1. Intro to WPO Milestone:** Build confidence in your knowledge of the WPO value proposition. Feel organized and poised to start building your chapter.

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Phase 2: Chapter Building – Plan & Host your Launch Event

★ **Goal:** *Identify ideal candidates and host a recruiting event to spark your chapter's growth. There will likely be overlap with the first phase as some things can be carried out concurrently.*

***If you are inheriting a chapter, we encourage you to review this section, as this will apply to future recruiting as a Chapter Chair.**

	Key Steps – Chapter Building	Resources
<input type="checkbox"/>	Plan Your Recruiting Event: Set a date (with at least 8 weeks' lead time), coordinating with WPO and your sponsor. Aim to create a “wow” experience that reflects the WPO brand.	RL + Judy Mechanics of Launching a Chapter & Recruiting in Your Community
<input type="checkbox"/>	Prospecting: Identify your first 80+ prospects using your network, LinkedIn, and referrals.	Head Office to help provide cold lead lists.
<input type="checkbox"/>	Begin Outreach: 60 days out, begin inviting candidates via email and LI. Simultaneously begin warm outreach to at least 3–5 potential members per week. Leverage your network - every conversation counts. Personalized approaches work well.	Head Office to develop marketing material
<input type="checkbox"/>	Host Event: A successful event typically results in 3–5 strong applications. Spotlight PeerView in a live demo if possible. Keep in mind the ultimate goal is to start securing at least 9 applications to start the chapter within 60 days.	Format of Launch & Recruiting Events
<input type="checkbox"/>	Follow up Promptly: Within 48–72 hours, follow up with all attendees to gauge interest, answer questions, and book interviews. Speed builds trust.	See “Membership Benefits & Pricing” document within CC Manual Recruitment Toolkit (PW: CCManual23)
<input type="checkbox"/>	Interview Candidates: Get to know the candidates to gauge interest, and confirm alignment re: revenue, ownership, leadership role, and values.	WPO Recruiting & Sales Script - Conversation Guide WPO Application Journey
<input type="checkbox"/>	Partner & Promote: Amplify visibility through social posts.	Social Media, Sponsors, RL

 **2. Chapter Building Milestone:** Secure at least 9 applications within 60–90 days of launch event.

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Phase 3: Maintain Momentum (60 – 90 days post launch event)

★ **Goal:** *Maintain Momentum – at this stage you will have 5-8 (or more) member applications on file.*

	Key Steps – Maintain Momentum	Resources
<input type="checkbox"/>	Connect 1-1: Schedule personal calls with each applicant to build trust and connection. Your early founders become your inner circle.	Continue to use your spreadsheet or CRM to track progress.
<input type="checkbox"/>	Group Touchpoints: Host informal group gatherings to support members to build trust and familiarity. Aim to keep member engagement high while you continue to build to 15.	Promoting Member Engagement Maintaining Positive Group Dynamics
<input type="checkbox"/>	Continue Interviews: As new leads arise, continue to meet with them to gauge interest, and confirm alignment.	WPO Recruiting & Sales Script - Conversation Guide
<input type="checkbox"/>	Notify WPO of Applicants: Let Carly know when your candidates submit applications. She will prompt you to confirm them in the system.	Carly Ward Popek, WPO Membership Coordinator (carly@women-presidents.com) WPO Application Journey Start Date Form (PW: SelectChapterDate)
<input type="checkbox"/>	Stay Growth-Focused: Use referrals, LinkedIn, and event invitations to keep recruiting toward 15.	Judy + RL

 **3. Maintain Momentum Milestone:** Maintain energy and engagement as you aim for 15 members by Month 15. Sooner is even better!

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Phase 4: New Chair Orientation

Prerequisite: You will need 9 applications in-house to attend Orientation.

★ **Goal:** Small group, in-person orientation to learn WPO PeerView™ and build relationships with peers.

	Key Steps – New Chair Orientation	Resources
<input type="checkbox"/>	Meet Fellow Chairs: Build relationships and share strategies with other Chairs on the same journey. One of the best parts of the job!	Participant Bio List (to be distributed before orientation)
<input type="checkbox"/>	WPO PeerView™ Practice: Participate in live WPO PeerView™ training to sharpen your skills and appreciate facilitation nuances.	WPO PeerView™ Facilitation Guide (PW: PEERVIEW25)
<input type="checkbox"/>	Facilitation Labs: Practice leading key parts of a meeting and receive peer feedback. Share your expertise and wisdom with your peers to experience the beauty of WPO PeerView™.	WPO PeerView™ Facilitation Guide (PW: PEERVIEW25)
<input type="checkbox"/>	Strengthen Your Plan: Leave with a refined growth plan and a stronger peer support network.	RL
<input type="checkbox"/>	Accountability Buddy: Pair up with a buddy to support each other moving forward.	Pairings announced during orientation

 **4. New Chair Orientation Milestone:** Build confidence with WPO PeerView™, and how run a successful chapter. Continue growing the chapter and welcoming new members as you get closer to hosting your first meeting with at least 9 members.

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Phase 5: Host First Chapter Meeting

★ **Goal:** Run your first WPO PeerView™ meeting with 9 – 18 members, within 3 months of starting your Chapter Chair role.

	Key Steps – First Meeting	Resources
<input type="checkbox"/>	<p>Member Welcome & Orientation: Open the meeting with an introduction to WPO. Use the Member Update form to ease into the PeerView process, and support members to get to know each other.</p>	<p>WPO PeerView™ Facilitation Guide (PW: PEERVIEW25)</p> <p>First Meeting Guidelines</p> <p>The First Few Meetings</p> <p>First Chapter Meeting Agenda</p>
<input type="checkbox"/>	<p>Norms Setting: Facilitate a short session to establish group norms and expectations.</p>	<p>Meeting Norms</p>
<input type="checkbox"/>	<p>Plan the Year: Confirm your meeting calendar and logistics with members.</p>	<p>Book calendar events for all meetings (embed relevant details – location / Update form etc.)</p>
<input type="checkbox"/>	<p>Keep Recruiting: Encourage each member to refer 1–2 like-minded leaders.</p>	<p>Judy + RL</p> <p>See “Recruitment Toolkit” in Chapter Chair Manual: Chapter Chair Manual (PW: CCManual23)</p>
<input type="checkbox"/>	<p>Celebrate & Invoice: Celebrate the milestone -and invoice WPO for your launch and meeting bonus (if 10+ members)!</p>	<p>Melissa Horne, WPO Bookkeeper (melissa@women-presidents.com)</p> <p>WPO Chapter Chair Compensation & Reimbursement Policies</p>

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 **5. First Meeting Milestone:** Launching your chapter is a significant accomplishment! Well done.

You're Not Alone - Ongoing Learning & Support

- Look out for Chapter Chair Connect Newsletter via email (tips, resources, updates)
- The portal is always a good place to start looking for resources.
- You will participate in a quarterly meeting with your Region Lead.
- Important Links:
 - [Quick Reference Guide](#)
 - [Chapter Chair Hub](#)
 - Login information corresponds to individual WPO Member Portal credentials
 - [2026 Calendar of Events](#)
 - [Chapter Chair Manual](#) (PW: CCManual23)
 - [Chapter Chair Onboarding](#) (PW: CConboarding23)
 - [WPO PeerView™ Facilitation Guide](#) (PW: PEERVIEW25)
 - [WPO Chapter Chair Compensation Reimbursement Policies](#)