

WPO Chapter Chair **Golden Nuggets 2023**

BRENDA ABDILLA, DENVER I & II

We create a really attractive "member roster" for our groups. This helps recruit in that people are so impressed with the confidential list. It also helps with sponsorship and free speakers.

DONNA CARLSON, COLORADO SPRINGS

I'm just launching my chapter, but I'll share my launch strategy. Since we don't have a national sponsor with a location in Colorado Springs, I'm approaching a women-owned resort to host the location with Prudential as a reception sponsor. I'll let you know how it goes, but if it goes well, you will attend a reception at Garden of the Gods Resort when you come to Forum next year.

AMY CASTRONOVA, BUFFALO & ROCHESTER

I start the meeting by asking everyone to share one word that describes how they're feeling right now. This practice helps everyone get grounded because it requires them to tune into themselves and sense what they're feeling. The members like it because it's often foreshadowing about what others will share in the Check-In. And as the Chair, I like that it gets everyone present quickly and eliminates the social conversations so we can get started.

CATHY CROSKY, HARTFORD, SPRINGFIELD, RENSSELAER

Chapter Vision Board

While this is not anything original, it is something that worked extremely well in one of my WPO meetings at the beginning of 2023. We participated in creating individual vision boards that included our work and personal life. Everyone was extremely engaged and loved the process and the sharing that followed. While we were searching through magazines to create our individual vision boards, we simultaneously selected images for a chapter vision board. The question was "What do you want to see our Chapter manifest in 2023". It was surprising how there were similar images and themes. This led to a fruitful conversation. Occasionally, I bring the chapter vision board to our meetings and ask "How are we doing?"

LAURA CROTHERS OSBORN, NJ II: MORRIS & NJ III: MONMOUTH

Simple GOLDEN Nuggets:

- (1) Ask everyone to share one tip they use to get them out of administritivia, keep them organized, or time management. (everyone always walks away with a few take-aways to try)
- (2) Assign a podcast for everyone to watch once a quarter and then have a chat about key take-aways. I let members recommend their favorite podcasts.
- (3) I created two bi-fold picture boards with 25+ pictures each – velcro'd on board so they can be removed. We use that as an opener or closer sometimes at retreats or meetings – pick a picture that speaks to you and then tell us why.
- (4) Find an article, case study or video on the Harvard SPARK site and share it with the team – this drives them to look at the SPARK program and gets good dialog going
- (5) AI learning hands on try it out – we asked 3 members using AI (Chat GPT or other) to share how and why they are using it and have everyone come with their laptops to then go and get hands on and try things. We used three perspectives: Technology firm/ Finance-numbers analysis and research / Marketing

JEANNE COUGHLIN, CLEVELAND

Our chapter created their own 'Group Agreements' that guide our behaviors. One of our agreements is 100% attendance at every meeting--if someone has a conflict we use doodle to find a new date/time that works for everyone. We ask members to treat their WPO group like one of their best customers.

WPO Cleveland, Group Agreements

- ✓ Roundtable members are expected to be at every meeting—every attempt will be made to reschedule a meeting when a group member has a conflict.
- ✓ Members will let the facilitator know if they are going to miss a meeting (if a member is not at a meeting and they are expected, we'll attempt to contact them with the assumption that there has been an emergency).
- ✓ Members will not be 'on their phones' (email, social media, etc.) during the meeting unless it's an urgent personal or business situation and that should be communicated to the group.
- ✓ What is said in the group stays in the group. It is OK to talk about a subject matter from a meeting after the meeting, as long as you're talking about your own experience and you're in the company of the group.
- ✓ We don't talk about a member who is not present either during a meeting or outside a meeting.
- ✓ If a member has a problem or concern involving another member or the facilitator, they will go directly to that person to discuss their concern. They can enlist the help/assistance of the facilitator and can bring it to the group after first discussing it with the person.

- ✓ If someone decides to leave the group, they will first communicate their intentions to the facilitator and then communicate with the group.
- ✓ Departing members will be treated with respect and are expected to maintain the confidentiality of the WPO group with no statute of limitations.
- ✓ Before new members are brought into the group, the facilitator will tell the group about the potential new member(s) so they can evaluate the potential for competitive businesses or past experience.
- ✓ Process monitors for each meeting will help to monitor timeliness of members and adherence to roundtable process and group agreements.

Revised 10/15/2019

ELIZABETH DAVIS, AUSTIN I & II

Speaker in a Box. Each of us has deep skill sets, and we can package our unique abilities and offer these to other chapters by presenting via Zoom at each other's chapter meetings. For example, I am willing to present to any chapter on the accountability chart, core value alignment, setting great goals, having great meetings, etc. If we create a directory of chapter chairs willing to present to other chapters, we can become each other's resource for speakers, deepening the member experience.

We also have non-chapter chair speakers willing to present to other chapters, and we can also create offerings for them. For example, I have a coach willing to do a Positive Intelligence exercise for any of the chapter chairs at no charge.

LAUREL DELANEY, CHICAGO I & II

Hello CC sisters!

Thus far in 2023 I have found that bringing in a guest expert to share their experience on a particular topic works wonders for my members. You don't need the individual to show an enormous PowerPoint presentation or even any PPT at all – perhaps just a few slides to support and drive home their point. Leave it up to the expert on their comfort level.

Examples:

- A Partner at Foley & Lardner (a law firm) covered workplace conduct, sexual harassment prevention, diversity and inclusion. He provided guidance on general policies regarding paid time off and holidays. No slides on this conversation. He was prepped in advance by me on what members struggled with. Introductions were made by each member in attendance, including what they were troubled about concerning the topic. The partner captured all challenges shared and addressed each member's pain point during his talk. Plus, as a bonus, he covered what members should consider for putting sound policies in place at their business. At the end, he offered access via email for any follow-on questions.

Time: 60 minutes, which included interruptions and a Q&A at the end.

- A former WPO Chicago member, three-time *Best Places to Work* recipient from Crain's Chicago Business, talked about how she went from *EXIT to an ESOP* at her business and why it worked. We started with introductions by each member in the room. Then our guest expert presented carefully crafted slides to support her conversation with members. Again, the beauty of the visit was to listen to her talk (experience sharing) and also have a conversation with her about anything that was on a member's mind – challenge her, poke holes in her assumptions, question some facts and so forth. Great learning experience. The former Chicago member followed up the next day and offered my members access to the team she assembled to make her ESOP happen successfully.

Time: 60 minutes, which included interruptions and a Q&A at the end.

Three key takeaways from the above examples:

1. Bring in people who are smarter than everyone else in the room on a particular topic to share their experience.
2. Let members freely ask what they want to ask of the expert.
3. Allow access to the guest expert for follow on questions after the meeting is over.

It works in terms of inspiring ideas and encouraging greater growth for WPO members' businesses. Hope it does for you and your members, too.

ANN ELLIOTT, COLUMBIA SC

MAGAZINE STORY

Goal: Create an imaginary cover story about a successful project or business achievement

Supplies: Poster Board, magazines, scissors, glue, crayons, magic markers

Time: 60-90 minutes

Number of participants: Any

Directions:

1. Depending upon the number of participants, put them in groups of 3-6 people. For a company, put them in groups of people who do not normally work together. At the WPO retreat, each member worked on her own cover story for her company.
2. Create a magazine cover story about your company or project (participants choose either).
3. Include these elements of the story: magazine name, cover story headline, quotes from leaders and team members, sidebars about project highlights, and images (Template)

4. Distribute to each team, the templates and supplies. Ask them to create a magazine story focusing on the project or business. Encourage creativity, imagination, and expansive thinking.
5. Have each group share their cover story with the entire team.
6. Choose the most creative magazine story. Give a prize to the winning team. For example, bar of organic chocolate 70%+ cocoa for each member of the winning team.

Objective: visualize future success, motivate team members, and encourage thinking BIG. This story is created without realistic constraints of current situations.

NAME:

SIDEBAR

IMAGE

HEADLINE:

QUOTES:

DEBRA FLANZ, NEW YORK VI

Welcoming a New Member

Introducing a new member to the chapter is always an important rite of passage. My goal is to ensure that the new member feels warmly welcomed and to create excitement among current members for the valuable addition.

Prior to the new member's first meeting, I send out a brief bio about her, including information about her company, her business background before becoming an entrepreneur, and any personal details if provided. I also request the new member to be prepared to answer these questions in front of the group:

- Where are you originally from?
- Where do you currently reside?
- What food could you eat every day for the rest of your life?
- What are you currently reading or watching?
- What was the last thing that made you smile?
- If you could snap your fingers and become an expert in something, what would it be?

Once the new member is introduced, each member will briefly introduce herself and choose one of the above questions to answer.

This exercise has always been insightful, fostering laughter and warmth within the conversation.

VICTORIA FLOREZ, LIMA

This year only two new members traveled from Peru to the EEF. I have translated and edited the Poker Divas presentation, hired a casino Dealer and had my members play poker! We had a wonderful meeting, a potential member ready to sign soon and great expectation on our next meeting where I will again translate and present the Eric Keiles presentation on marketing.

BOBBIE GOHEEN, VIRTUAL I

A Leadership Moment for Gratitude

At the start of the meeting take 20 minutes for this connection exercise:

1. Pair members together randomly or seated next to each other (whatever is quickest and easiest to begin the exercise. You don't want to spend time figuring out what is the best way)
2. For 7 minutes have one member ask the other these questions:
 - a) What did you do this month that you have not been thanked for?
 - o The listener thanks their peer for the contribution they have made to the situation they described.
 - b) What acts of kindness did you see in the past month?
 - c) What acts of kindness did you perform in the last month?
 - d) What you look back over the past month, what are you most grateful for?

- e) In the last month what was something that you thought "happened to you" and actually turned to be "a blessing in disguise"?
3. When 7 minutes are up, have the pairs reverse roles, one becomes the listener and the other shares their answers to the questions.

At the end of the second session bring the group together and ask the following questions for five minutes:

- What insights did you gain from hearing each others answers?
- What insights did you gain from sharing your month?
- What is resonating with you from this conversation.

Thank them for their participation and engagement. And begin your normal meeting process. The session is built to create better personal ties and connection with members and create a good beginning to the meeting. Enjoy!!

TERESA HARGRAVE, PLATINUM VIII

Recently my Platinum VIII group invited Mentees+Daughters (M+D), ages 21-38 (I think ages 28-38 would be better), to join us for our 3-day retreat. This was the first time we have done this and it won't be our last. The members and their guests loved it! Here is how I did it:

- I hired a separate facilitator for the M+Ds. The topic chosen was Cultivating Strengths. If I were to do it again, I would have them go through a similar topic with their facilitator as the member group was doing. We were doing part of the McKinsey Remarkable Women's Course and the M+Ds would have loved it too. I felt it was important to have the groups separate for the content portions mainly because we meet so infrequently that I wanted to protect their "member time" and partially because not everyone had a guest and I wanted everyone to have "peer time".
- We brought the 2 groups together after dinner for a "meet and greet" the first night and dinner and a vibrant Q+A afterwards the second night. They were having concurrent sessions as we were on Wed, Thursday and Friday.
- I structured the Q+A by asking the members to write questions they would like to ask the M+Ds and vice versa (1 per card). We sat in a big circle with Members on one side, M+D's on the other. I picked through the questions (and added some of my own) rotating between the two groups. I read the question and then gave 2 people one minute to answer. The energy was terrific and responses were powerful, funny and insightful.
- The program for the M+D's was paid for by the members who brought guests and totaled \$450 per M+D.
- If you have more specific questions on how to do something like this, call me at 203-206-2376. I am glad to assist.

LAJEWEL HARRISON, NORTHERN VIRGINIA

With the purpose of increasing WPO-member engagement, I have increased contact with other chapters. For chapters that are nearby, I have collaborated with the other chapter chairs to host expert information sessions and recruitment events. For chapters that are not geographically close, I have collaborated to host expert sessions via zoom. Once I held a zoom meeting that was fully dedicated to networking across chapter lines. I include these activities at least twice each year. At each session, the women have an opportunity to introduce themselves and their industry.

Also, to keep attendance high in the summer months, I switched to virtual sessions only in July and August. The members are able to log in from wherever they have traveled for the summer.

SUE HAWKES, PLATINUM VI

Participating in a WPO Chapter Chair pod has been very valuable. Through the pod I've learned best practices from other Chairs, solved issues, and gained additional resources that I've shared with my chapter. Having a designated time and space to support and be supported by other Chairs has led to better facilitation and meetings for my members. I also appreciate that I've gotten to know the other Chairs in my pod better.

DONNA HEGDAHL, DALLAS & DALLAS UPTOWN

We moved our meetings to late afternoon, then added a "happy hour" after the meeting. We go to a close restaurant for snacks and drinks. It's a perfect time to talk about things that came up during the meeting. Also allows one-on-one time with individuals versus all "group conversations." I started this with one of my groups, then my second chapter decided THEY needed a happy hour too. So now both groups do it every month. Very fun!

KANDY HIRSCH, TUCSON I, II & III

End of Meeting Acknowledgment

Time needed - 2-3 minutes per member

This is something I made up on the spot and it worked out really well to leave members feeling seen & appreciated.

Setup: We often don't acknowledge others qualities and accomplishments. Lets take a few minutes and focus on each person, acknowledging what they have accomplished, and the qualities they exhibit, or even how they touched you.

Then I started with the member on my left and one by one we went around the table. Not everyone has to say something but it ended up being a love fest! I have only done this in one of my groups so far but will do the other 2 groups this month.

GAYE GOKER, TURKEY

We went through a devastating earthquake last February and three of our members were in that region. Naturally all of us wanted to do everything we can to help for the region and for our members. Obviously this tremendous effort took toll on our psyches and since February we decided to hold our meetings in warmer environments so since then every month we are meeting in one of our members home. It not only helps us heal but also collaborate and find ways to help each others businesses. Moreover it significantly increased the attendance.

BETTY HINES, PLATINUM III

Introduction of ChatGPT. There are articles or you can get a presenter on the topic. Our topic is how to effectively use ChatGPT in your business strategy to boost marketing and sales activities.

You can

- 1) Identify use cases. ChatGPT can add value to your marketing and sales effort.
- 2) Train the model: Familiarize ChatGPT with your business context by training it on relevant data and examples
- 3) Organize with a presenter and members bring their laptops
- 4) Encourage members to bring their own business cases or challenges where ChatGPT could be beneficial.
- 5) Experimentation and Implementation

JAYNE HUSTON, LANCASTER

After polling my Chapter members regarding the skills sets they would like to learn through Harvard's new SPARK online resources, I planned a meeting to focus on having "Difficult Conversations." I curated several articles for initial discussion, asked members to bring a case study involving a difficult conversation they had (and wished had gone better) or one they would be having in the near future. I then developed a worksheet to be used in "peer pods" for members to plan for their difficult discussion together. Members then presented their learnings to the full group. I've attached the worksheet that I created for this purpose.

Preparing for a Difficult Conversation

WORKSHEET

Thinking about a difficult conversation you may be anticipating or one that you have had in the past that didn't produce the results you intended, how might you prepare or prepare differently? Use the following best practices curated from Harvard's SPARK online resources ("How to Handle Difficult Conversations at Work" (Knight); "How Good Are You at Critical Conversations?" (Tjan); "Difficult Conversation: 9 Common Mistakes") as a preparation guide:

1. How Can You Reframe (Change Your Mindset from "difficult" to productive) the discussion in your mind? (i.e. you're not say "no;" you're offering an alternative solution)

2. Plan but don't script:
 - a. What is the problem?

 - b. What would my counterpart say the problem is?

 - c. What's my preferred outcome? List them! Start with the concrete ones (i.e. "she will agree to these specific performance goals") and include the more abstract ones, as well. (i.e. "she knows I really want her to succeed and will do everything to help her.") Make an exhaustive list.

- d. Are there any alternative solutions to the preferred outcome? List them.
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- 3. The right participants in the appropriate setting (Invite the right people to and select the right type of meeting for the conversation)
 - a. Who should be invited to this conversation?
 - b. Where should it be held?
 - Does the space allow good eye contact?
 - Does it promote reflective dialogue when called for?

Additional Best Practices to Keep In Mind When Having this Difficult Conversation:

- Acknowledge Your Counterpart's Perspective – Express your interest in understanding how the other person feels. Look for overlap between your point of view and your counterpart's.
- Be compassionate; use empathy. Deliver bad news in a courageous, honest and fair way. Don't play the "victim."
- Slow down and listen. Make sure your actions reinforce your words.

GINA KALLICK, PITTSBURGH I & II

I wanted to focus on building community this year and bring both of my chapters together as WPO rather than CH1 & CH2, therefore I have done a few things outside of our meetings. I have Social Ambassadors from both of my chapters who work together to plan 2-3 gatherings per year. Social and Social Action. They have been fun and rewarding.

SUSAN KELLER, BOSTON I & PROVIDENCE

We make finances fun-- financial acumen is key to the success of any business and we use real life business situations to analyze the numbers behind the situation and look at possible solutions based on the financial outcome of the choices. It takes the emotion out of the situation and results in more thoughtful and beneficial decisions.

NANCY KUKOVICH, GREENSBURG

Every July we convene at a member's pool for a casual dinner and a session on employment law provided by her law firm. Its the issue about which everyone needs more information

KATHY LONG HOLLAND, PORTLAND OR

I have mixed up digital and “live” meetings and it has been very successful. It is a mix of meeting at the member companies, Zoom and at our sponsor boardroom. Zoom is efficient and allows for sharing of content and outside presenters that we could not access locally. The “live” meetings provide the social interaction and connective tissue. We have members living elsewhere in the State so it also allows us to have a larger reach in membership.

MYRNA MAROFSKY, MINNEAPOLIS I

Instead of a one word opening, I have passed out the Hoffman Feelings and Body Sensation list as an opening exercise. Each member selects a word that describes how they are feeling and another word for the associated body sensation. I like this list because it goes beyond the typical, mad, sad, glad, and links to the physical manifestation. Naming their feelings creates an awareness about themselves. It helps members get in touch with the connection between their internal and external worlds and the group has a greater emotional connection with each other. Opening a meeting with this list can be a small agenda item that sometimes identifies needs for actions that can be processed through a roundtable. The PDF can be found at:
<https://www.hoffmaninstitute.org/wp-content/uploads/Practices-FeelingsSensations.pdf>

*See Appendix: Myrna Marofsky

ANNE MESSENGER, SYRACUSE II

Attached is a resource list for Syracuse II's July 2023 wellness-themed retreat.

ARTICLES

* **"The Intersection of Wellness and Leadership,"** Jessie Spresart, *ABA*, Nov-Dec 2021.

As a leader, making sure that you have attended to your own needs is essential. In addition to setting a good example for others, developing a self-care practice to support your own well-being will enable you to be more present, resilient and effective in your role.

https://www.americanbar.org/groups/law_practice/publications/law_practice_magazine/2021/nd21/spresart/#:~:text=Leaders%20need%20to%20understand%20how,is%20essential%20to%20their%20role

* **"The Mental Health Benefits of Learning a New Skill,"** Alison Rodericks, Upskilled

<https://www.upskilled.edu.au/skillstalk/mental-health-benefits-learning-new-skill>

* **"The power of music as medicine in health and wellness businesses,"** feed.fm. Music for wellness is a powerful tool for stress reduction, relaxation, sleep facilitation, and drug-free pain management.

https://www.feed.fm/music-for-wellness?utm_source=google&utm_medium=cpc&utm_campaign=13885399628&utm_content=147797619990&utm_term=&hsa_acc=1691119516&hsa_cam=13885399628&hsa_grp=147797619990&hsa_ad=638099364218&hsa_src=g&hsa_tgt=dsa-1946072695638&hsa_kw=&hsa_mt=&hsa_net=adwords&hsa_ver=3&gad=1&gclid=CjwKCAjwp6CkKhB_EiwAlQVyxcodI3RYKoEo8k45fSm28DoDxHCBPs9UTV88UpfkgzCYj6Glke4TqhoC684QAvD_BwE

- * ***Mindful Eating***, The Nutrition Source, Harvard School of Public Health, recommended by Andrea Hart, RDN, <https://www.linkedin.com/in/andrea-hart-rdn/>

PODCASTS

* **"Seeking Serenity, Part 1,"** Hidden Brain, 49 min. In graduate school, neuroscientist Richard Davidson learned to use scientific tools as a way to examine the brain. At the same time, he also started studying under master meditators — who deeply contemplated their internal and external lives. Two ways of understanding the mind.

<https://podcasts.apple.com/us/podcast/hidden-brain/id1028908750?i=1000615761994>

* **"Seeking Serenity, Part 2,"** *Hidden Brain*, 50 min. In the second part of the series on the science of meditation, Richard Davidson continues his endeavor to unite seemingly opposite ways of understanding the mind. Plus, he shares the latest research on mindfulness, and the unexpected ways it can benefit us.

<https://podcasts.apple.com/us/podcast/hidden-brain/id1028908750?i=1000616190010>

Quick takeaways from the above for me:

- * "Change is the only constant." - from Buddhism
- * Relationship between pain and resilience
- * Living in the moment improves with practice

SPARK ARTICLES

* **“How to Become More Comfortable with Change,”** *HBR*, Kathryn Chubb & Jeni Fan, 8 min. McKinsey research indicates that 86% of leaders see themselves as role models, while just 53% of their direct reports agree....People with a change-ready mindset know that change is continuous and see it as an opportunity.

<https://degreed.com/articles/how-to-become-more-comfortable-with-change?d=28532040&orgsso=womenpresidentorganizationhmmspark&inputType=Article>

SPARK VIDEOS

* **“The Calm Down Effect,”** 2:24 min.

<https://degreed.com/videos/the-calm-down-effect?d=12583627&orgsso=womenpresidentorganizationhmmspark&inputType=Video>

BOOKS

The Age-Proof Brain, Marc Milstein, PhD. Marc Milstein, PhD, specializes in taking the leading science research on brain health and presenting it in a way that entertains, educates, and empowers his audience to live better. His presentations provide science-based solutions to keep the brain healthy, boost productivity, and maximize longevity. Recommended by Caragh, who heard Milstein at a conference. (7 hr.,40 min. on Audible) - Game changer

Ikigai: The Japanese Secret to a Long and Happy Life, Héctor García, Francesc Miralles (3 hr. 19 min. on Audible) - Game changer

CHRISTY MARTIN & MARY JANE PIOLI, BELLEVUE & SEATTLE

Co-chairing two-plus chapters: Mary Jane Pioli and Christy Martin have been co-chairing chapters since 2001. It's been a great arrangement. We split all fees evenly. We both attend all meetings. We divide the work primarily between inward-facing and outward-facing. That is, running the meetings and recruiting/retaining members. However, we have learned to be interchangeable even in those roles, helping each other seamlessly when needed.

Advantages:

- Having someone to discuss ideas and strategy with.
- Being able to miss a meeting or ability to relax and not lead if situations arise.
- Having a second set of eyes and ears at each meeting (we both attend every meeting possible).
- It's fun to co-lead with a respected, beloved colleague.
- You have someone to share creating golden nuggets with!

Tips for success:

- Divide responsibilities and be willing to help each other out when needed.
- Have a clear lead at meetings. One person is obvious to the members as the lead for the meeting; the other is in support. MJ and I always include each other when we're leading so the members have a consistent demonstration of the two of us working together.
- Use great meetings as a retention device to reduce need for additional recruiting.
- Leverage the members for 3 annual events: Retreat, Summer gathering, Holiday gathering.
- Always be respectful to each other in front of the members.
- Hire a coach to learn how to use your leadership styles to complement each other. (This will be on your own nickel and is worth the investment.)
- Leave your ego at the door.

DIANE MCILREE, NEW YORK I

My members enjoy "Experience Share" sessions. Members submit a list of topics they'd like to discuss with the chapter. Recent examples: best practices for adding a new line of business; methods for optimizing the use of virtual assistants; pricing models for businesses serving B-B and B-C companies; technologies that small businesses need to employ to stay competitive, etc.

Some of the topics are reserved for roundtable discussions, i.e. how to successfully create an effective culture following a merger or acquisition. Other topics are addressed via lightening round questions, e.g. practices relating to incentive compensation structures including annual bonuses, salary increases, 401(k) plans and other deferred compensation plans.

We may not have roundtables to process each month, but we always have discussions that enhance member engagement and generate take-away value.

MARLA NOEL, ORANGE COUNTY III

Because we were having challenges with attendance, we made a couple of changes;

- 1) We moved the meetings to lunch time on a different day, one that worked best for the group. We have many mothers with young children.
- 2) We developed group values for all to follow. I include them on all agendas:
Values-We are a group of Dynamic, Committed, Innovative and Caring women. **Mission-** We Share and Process issues then turn them into winning strategies. We feel connected. We have the support, opinions and mindset from a female CEO point of view. **Group rules-** Attendance: 10 out of 12 meetings. Be on time.
- 3) Each member will be presenting a topic every month, either information about their business, or something they can share with the rest of us regarding best practices.
This next meeting, one of my members will be training on LinkedIn.

We have just started this last month. The WPO conference ignited energy into our group and helped us to bond. Most of the group attended, and wow, it made a difference.

DAWN O'CONNOR, CALGARY I & II

I feel like I cannot come up with anything original, so my suggestion is to read all the golden nuggets of the past and select a few that resonate, then aim to implement them in the next 12 months.

My favourite and most successful was Susan Denk's from a few years ago. She shared about an alternative 3 Min Update process called the 5%. I won't explain the details here, but it is a wonderful tool that has had a significant positive impact on all my chapters.

The 5% Update encourages members to focus on their feelings and the significance of an event / issue, vs telling a detailed story. With this approach, I notice we get more issues surfacing and we stay on time for 3 min updates.

KATHY PEDROTTI HAYS, INDIANAPOLIS

This year we've instituted time at each meeting for a member to give a SWOT analysis of their business. This has really helped take the group past immediate concerns and pressing issues and dive a little deeper into their businesses. For some of our members, this has been the first time they have done a SWOT. Oftentimes they have thought about their SWOT but not put it in writing. It has also helped to "on-board" all of our members to each other's businesses as new members have rotated in. We use about 30 minutes and ask the featured member to prepare notes for themselves using the SWOT grid but prepared handouts are not necessary. It has spurred a lot of discussion and resource sharing that would not have occurred otherwise. After the presenter finishes, we allow 15 minutes for "clarifying" questions from the other members. It has been very well received and is easy to implement plus provides a real value to the featured company and the other members.

GRACE POLHEMUS, NJ IV: PRINCETON

For our April Chapter meeting our very own Barbara Roberts, delivered a powerful workshop entitled “90 Minutes to a Growth/Value Creation Strategy”. This workshop was based on the results of a survey I sent out to our members on topics they wanted to hear. Our members found this workshop to be very helpful and informative.

Barbara covered the following topics:

- What makes a business more valuable? What are the 40 ways to create value for your customers?
- What are the nine strategy questions every business owner should be asking as we come out of COVID?
- How do you put this together to create a three-year growth and/or exit plan?
- What are the 10 exits that can happen for you and your business?
- What is the strategy for each exit?

I would highly recommend Barbara as she not only has the wisdom and expertise but she also provided a ton of valuable articles and papers created specifically for the WPO members.

LINDA RAPPAPORT, BOSTON II

We read Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones by James Clear. I created specific worksheets from the workbook and each member identify one bad habit and what will be the strategy to change the bad habit to a good habit.

Atomic Habits

Your Plan of Action

1. Choose one new habit you want to start?
2. Form an identify statement incorporating your new habit. Example: I want to start eating more healthy food and less junk because I want to be a healthy person.
3. Create a list of baby steps or things which you are able to do in order to continually reinforce your identity statement.
4. Think of a list of your habits and see which of those have already been incorporated into your self-identity. Highlight the bad habits which you want to get rid of and consciously work in positives into your self-identity.

Action Checklist

1. What kind of results do you wish to attain? Ask yourself who is the type of person who would achieve this kind of outcome.
2. What will you change in your identity to better serve you? Focus on who you wish to become instead of what you wish to achieve.

BARBARA ROBERTS, NEW YORK V

Retreats are a secret sauce for retaining members but can be very time consuming for a Chair. NYV has established the norm that attending the conference is very important and our place for longer bonding. We also have the norm that each member has some contact with another member every month and must report that in the check in. Lastly, we do a longer all day meeting in NYC as a casual retreat in August and stress that the purpose is to get to know each other and how we can help each other. We do not have outside speakers as we mine the intellectual and experience capital in the group.

As we prepare for our August 16, I reread the superb book on facilitation, **The Art of Gathering: How we meet and why it matters** by Priya Parker. Strongly suggest reading it as it will instantly amplify the impact of your meetings and facilitation.

For our retreat this year, first session with lunch will be each member's sales pitch and statement about top client and dream introductions...aim and purpose is to find out how we can help each other with sales and introductions. The afternoon will be Golden Nuggets...each member has up to 7 minutes to share something she or her company does extremely well. For the evening, we are doing a google document which will collect everyone's recommendations for best doctors, restaurants, accountants, web developers, It help, social media consultants, best business book, best personal help book etc. This retreat is being planned as we close Golden Nuggets. If you are interested in seeing the final agenda or the document to collect "Bests", please email me or see me at the retreat.

BECKY ROBBINS, HOUSTON I & II & NORTHERN COLORADO

Showcasing Members

In all of our chapters we are showcasing each company-one per month. This gives each member more time to share about their business and do a deeper dive into their SWOT with the other members. members ask questions and give more in-depth feedback. They each have 20-30 minutes and volunteer the month before to showcase their businesses. We also do a roundtable for the rest of the members at the meeting.

VALERIA RODRIGUEZ CODINA, GALICIA

VALUE & GROWTH THROUGH PARTNERSHIPS

The Spanish Chapters have establish partnerships with:

1. IE Business School (one of the leading business schools in Madrid)
2. ABANCA (leading bank in northern Spain).
3. Innova (training & consulting of entrepreneurs)
4. Confederacion Empresarios de Galicia
5. Chamber of Commerce Madrid

The aim is to invite them to nominate members and give some extra value to the chapter.

CELESTE SCHUMACHER, MINNEAPOLIS III

We did a SWOT analysis with a member.

Part 1

We had a member who was scheduled to do a case study on her business and realizing that as much as we all know her business - we don't understand the intricacies and legal requirements of her business because she skips words and ideas when she explains things and we didn't challenge her enough and ask questions.

The member put together detail SWOT, Strengths, Weaknesses, Opportunities, and Threats, analysis and after each section we asked clarifying questions in order to understanding her business.

Examples:

Strengths

1. Quick decisions/quick changes - staffing, product mix, budgets, changing displays, getting special orders for customers, delivery, online sales, changing hours seasonally, curbside pick up

Weaknesses

1. Neighborhood - impacted by the riots following the murder of George Floyd - perceived as unsafe, encampments, indigenous reservation, low income, city of Minneapolis, youth gangs

Opportunities

1. Pricing model – we are value-based, could change our pricing/increase to make more money

Threats

1. Thieves---keep good people away

Part 2

The member is getting ready to sell her business the ask to the group was:

What should I be bringing forward ?

What would you do if you were in my shoes?

Give advice?

Things I should consider/think about

PATRICIA SHEA, NASHVILLE I & II

My Nashville Chapters have planned and attended an annual retreat since the group(s) started. During those retreats, we always worked - maybe 6 hours per day - learning and planning for the coming year. Last year, we planned our retreat at Canyon Ranch. Given the price of CR, we decided not to work on our businesses while there but to work on ourselves. It was the first time we took a "personal wellness" approach to our time together. It was great. Everyone was delighted. As you can imagine, we are doing the same this year - going to CIVANA Resort and Spa - for a wellness retreat. It's about time we focused on self-care.

LAURIE SINCLAIR, ATLANTIC CANADA I & II, ST. JOHN'S I & II & PLATINUM IX

In my chapters we do a strategic planning and visioning exercise at the beginning of each year to define vision, values and goals for the chapter for the year. I create a one page document that frames up our chapter vision, values and strategic objectives. or goals We refer to this document at the beginning of each meeting. We use this to frame up and clarify our chapter culture. We revisit the clarity of our chapter culture which is rooted in our values, every meeting in an exercise where I invite members to share a lived experience of where a member has demonstrated living our values. These shared lived experiences are inspirational, motivational and remind everyone to function as a contributing chapter member in alignment with our agreed upon values and culture. I always have a few lived values experiences in my back pocket to share in case the group needs inspiration. This regular meeting exercise makes our chapter and values real and alive and reminds everyone how we have agreed to function as a chapter.

DENISE SMITH, ATLANTA III

To foster a deeper sense of personal connection and collective meaning, I asked each of us to choose a word that holds special significance in relation to our journey here in Atlanta. The purpose was to create a State of Georgia Word Cloud, which I'm delighted to attach.

As you explore the Word Cloud, you'll witness a powerful representation of our thoughts, values, and aspirations. Each word carries its own unique story, offering a glimpse into the individual perspectives that make us who we are. Collectively, these words form a tapestry of inspiration and purpose that defines our team.



ALLISON TABOR, DIABLO VALLEY, GREATER BAY & PLATINUM V

Bay Area Regional Event, led by Allison Tabor

The Bay Area has five chapters, two of which I facilitate (Diablo Valley and Greater Bay). Over the years, we've had regional events. The most recent one was a member favorite and successful in various ways, which I will highlight below.

Sponsor:

- JP Morgan Chase was our sponsor.
- We worked very closely to coordinate an experience that the members would most appreciate.
- Besides contributing financially, the sponsor invited qualified members and provided admin support (invitations, RSVPs' name badges).

Guests (62 total):

- All current Bay Area local chapter members
- Any Platinum members in the region.
- Bay Area based Chapter Chairs, including a Zenith Chapter Chair.
- Invited qualified guests. Each CC and sponsor invited qualified guests.
- Alumni members in the region (first time including them).
- Camille was invited and attended as our special guest. It was a special honor to have her as our VIP guest.

Venue and Agenda:

- Weeknight (Tuesday) from 4:30pm-7:30pm
- Held at members event space, Ciel Creative, a beautiful, spacious place. The space rental fee was donated, and the sponsor only paid a modest fee to cover overhead costs.
- Our event theme was Better Together. Each Chapter was asked to nominate one member to share how they've experienced being Better Together in the WPO. They each had three minutes to share Tedx style. Members laughed and cried! It was so meaningful and publicly affirming of the value of the WPO community.
- Besides catering, the Sponsor agreed to purchase wine from Teneral Cellars, owned by a WPO member.
- We had a live band, Orchestrating Excellence. They provided great music and led our guests through a harmonizing exercise using shakers (which the guests kept as gifts). The musician wanted to include a poem reading as part of the member interaction section. Years ago, I had written a poem You Glow WPO Girl, which I read with his accompanying music. It was very well received.
- Sponsored Head Shot Photo Station was hit! The members loved getting updated photos taken by Lara George, a fabulous female photographer.

Takeaway's

- 1) Start planning early.
- 2) Create an event theme.

- 3) Enroll your Chapter Chair colleague early to save-the-date, plan to attend and bring their members and qualified guests.
- 4) Instead of an event speaker, involve members and allow plenty of time for members to engage with each other.
- 5) Foster good sponsor relationships. Be specific with your sponsor as to what would be most beneficial and enlist their support. Rather than stage time talking about themselves and their products/services, ask them to attend and bring a few colleagues to mingle in the crowd with the members. Treat them as a guest of honor and enthusiastically acknowledge them for their support of our WPO community and sponsoring the event.
- 6) Hire WPO members and/or woman-owned businesses as much as possible.
- 7) Alumni members can be advocates and bring qualified guests!
- 8) Engaging with members and hearing their Better Together shares guests joined various chapters. Also, a local chapter member moved into a Platinum group and an alumni member rejoined!
- 9) Social media posts got great visibility, which created after event interest from a member candidate.

*See Appendix: Allison Tabor

KAREN TRACEY, BIRMINGHAM & LONDON

Learning and support is often at the centre of the rationale for WPO members becoming and renewing as members in my opinion.

Ensuring that learning and is focussed and meeting the needs of individuals and the chapter as a whole is very important.

In my experience, involving the chapter members in these decisions as well as the delivery and facilitation of the learning is fundamental to the success of it.

In the UK, I have approached this using "Learning Quarters".

We have designed a written (1 pager attached) schedule which outlines a number of things for members for the year such as dates, events, venues, speakers etc and in this "yearly diary", we "map out" our four Learning Quarters.

We hold a discussion at the beginning of the year as to the four subject areas that members are interested in. They are often the "usual suspects areas" that come up but what we do around these areas is where a bit of creativity comes in.

In the UK this year, members chose:

- Strategy
- Finance
- Sales and Marketing and
- Legal and HR.

By using members themselves as speakers and contributors, we begin the quarter with a speaker or presentation.

For example, in the Finance and Sales and Marketing Learning Quarters this year, members from Birmingham and London did presentations from their own expertise either themselves or used people from their teams.

The following two sessions after the presentation month are discussions between members about what they did as a result of the presentation, what they have learned and how they have embedded it in their businesses

As the Chair, I also used content from the SPARK platform to support and also embed the knowledge for members which not only built on the learning from the sessions but is a constant reminder of the SPARK resource and how useful it is.

Hope this is helpful. Karen

*See Appendix: Karen Tracey

VICKI UNGER, LOS ANGELES II & III

After exiting half of LA2 this year for all the right reasons, the alums still wanted to stay connected so I suggested they meet for dinner together which turned into the launch of quarterly alum dinners at Txoco, Jackie Keller's private dining room which "sold out" immediately. Our former CPA even flew in from South Carolina.

Hoping they will continue to refer new members and perhaps become MAL. So many changes have taken place from closing offices and going 100% remote to selling their companies, battles with cancer, going back to school (law school), divorce, running new businesses. Only 1 is retired! FYI I plan to do a reunion with my other chapter in the fall.

Turns out LA2 just celebrated its 10 year anniversary in Feb. so timing was perfect !

Follow up Letter I sent alums:

Hi Alums,

Two things I want to remind you of:

1. *You* can become a WPO Member at Large. This allows you to stay involved on a formal level with WPO, get all the member benefits without the obligation of attending any monthly meetings.

See <https://www.women-presidents.com/membership/become-a-member/>

2. Regardless of your current status with WPO, you still know other women founders, Presidents and CEOs who could benefit from joining a chapter. Pay it forward. Recommend WPO to someone who most likely has never heard of the organization but could really use the peer to peer wisdom and support of belonging. I'm counting on you to be one of my ambassadors!

See you at the next one, if not before!

xo

DORA VALDEZ, MONTERREY

Something that I started doing different is bring them the Mayor and local authorities to see what changes can we do with our companies to help our City and also to give them visibility in events so that my WPO members can be speakers, participate in podcasts and many more events.

ROXANA VALETON, LAS VEGAS

I don't have any experience working as a Chapter Chair for the WPO just yet but what I can share from my experience working with my Board of Directors. One of the things that has worked for me is cultivating a transparent board environment and ensure that clear goals and objectives are effectively communicated and shared among all board members. This promotes collaboration, accountability, and alignment towards achieving the organization's mission and vision.

DEBRA VALLE, ORANGE COUNTY I

Marla Noel and I hosted a one-day regional event for all three Orange County Chapters. The theme was ***Build, Scale, Sell your business***. The morning was primarily about growth and the afternoon about selling.

What made the day successful was:

- Camille Burns attended and moderated a conversation with new WPO Board Chair Asma Ishaq, about growing and selling her business.
- Morning Speaker Erin King spoke effective communications/branding – she was very dynamic and invited group participation.
- Afternoon speaker: Elizabeth Ledoux helped members think through and establish goals for the sale of their businesses.
- Plus, there were two panels. The panel in the morning facilitated by Marla, was made up of members who have grown their businesses organically and through new products and services
- The afternoon panel was made up of women business owners (both members and nonmembers) who shared trial and tribulations of the sale of their businesses.

The tables were intentionally mixed with members from all three groups providing members the opportunity to network.

The event space was centrally located, offering parking and great catering.

Frankly, what I appreciated most was not having to carry the weight of the event by myself and the opportunity to divide the labor of a one-day retreat with Marla along with the support of WPO headquarters.

BRENDA WADE, ZENITH II

In Zenith 2 we've instituted the "Opportunity Round", suggested by Phyllis, Any member who has an opportunity in which other members can participate presents it investment, purchase, partnering. etc.

SANDRA WEAR, VANCOUVER I & II

I created check-list and example to work through valuation drivers. Also had a take-away to do from home in weighting and strength of each member's business. I divided into breakout groups of 3-4 to work through the exercise and then discuss the results to the group. The exercise worked quite well.

*See Appendix: Sandra Wear

SANDI WEBSTER, NEW YORK III

I have my members give presentations of their companies or on a specific product/service they added. Members have said even though they have been in this chapter with the other ladies, until they did a presentation of their company or a topic on which they speak, they didn't realize how much that company did, or some thought they did something totally different. Now when that member has an issue, it's easier to give impactful feedback since they know more now about the company. Members also expressed how vulnerable they felt to present at that level to their peers. The people who included high level financials said they also waffled about numbers because they never really discussed them in depth in meetings - they would say "we grew 20%" without giving a number. I now hear members say "hey, I met someone at a conference who you should really meet - I'll connect you." I feel they are closer as a chapter than they were previously. One member presented why we should be investing in art right now and got some buyers from the group as well as recommendations.

LIZ WHITHEAD, GREATER BALTIMORE, GREENBELT & WASHINGTON D.C. II

Use the Chapter Chair Slack Channel! I've found it so helpful to get information on presenting Spark, finding a speaker on a particular topic and just crowd sourcing ideas.

ANNI WILHELMI, CAPE TOWN I & II, JOHANNESBURG I & PLATINUM VII

A week before a meeting, I email or WhatsApp the following to members:

Afternoon ladies,

Kindly respond to the following, on this group:

1. Confirm attendance at the meeting in person next Thursday, 6th July 2.00pm to 6.00pm. (yes/no). If no, kindly indicate reason for absence.

Please prepare a 3-minute check in, as per our usual document. Give special attention to analysing your annual goal performance at the halfway mark of the calendar year to report a percentage (%) of achievement.

2. Advise if you have a business issue for roundtable or lightening round. (yes/no)

3. Advise if you have a new idea or concept or strategy which you would like to test on the group. (Yes/No). If yes, please complete the attached document. (yes/no)

4. Advise if you have an issue, you need encouragement/motivation/support with. (yes/no). If yes, can we schedule a call or could you email me context so that we can prep to effectively deliver this to the chapter.

For Chapter Chairs to note: This is very often a roundtable that a member has not identified as such.

5. Advise if you have a topic of interest to present to the group. Using google slides, prezzie, canva or PP to enhance your presentation will be appreciated.

- Rozi - Teams is not only a meeting platform. How to use Teams as an ERP system.
- Anyone on Enterprise Development

APPENDIX FOLLOWS

Feelings List

Accepting / Open	Angry / Annoyed	Connected / Loving	Disconnected / Numb	Fragile	Stressed / Tense
Calm	Agitated	Accepting	Aloof	Helpless	Anxious
Centered	Aggravated	Affectionate	Bored	Sensitive	Burned out
Content	Bitter	Caring	Confused	Grateful	Cranky
Fulfilled	Contempt	Compassion	Distant	Appreciative	Depleted
Patient	Cynical	Empathy	Empty	Blessed	Edgy
Peaceful	Disdain	Fulfilled	Indifferent	Delighted	Exhausted
Present	Disgruntled	Present	Isolated	Fortunate	Frazzled
Relaxed	Disturbed	Safe	Lethargic	Grace	Overwhelm
Serene	Edgy	Warm	Listless	Humbled	Rattled
Trusting	Exasperated	Worthy	Removed	Lucky	Rejecting
Aliveness / Joy	Frustrated	Curious	Resistant	Moved	Restless
Amazed	Furious	Engaged	Shut Down	Thankful	Shaken
Awe	Grouchy	Exploring	Uneasy	Touched	Tight
Bliss	Hostile	Fascinated	Withdrawn	Guilt	Weary
Delighted	Impatient	Interested	Embarrassed / Shame	Regret	Worn out
Eager	Irritated	Intrigued	Ashamed	Remorseful	Unsettled / Doubt
Ecstatic	Irate	Involved	Humiliated	Sorry	Apprehensive
Enchanted	Moody	Stimulated	Inhibited	Hopeful	Concerned
Energized	On edge	Despair / Sad	Mortified	Encouraged	Dissatisfied
Engaged	Outraged	Anguish	Self-conscious	Expectant	Disturbed
Enthusiastic	Pissed	Depressed	Useless	Optimistic	Grouchy
Excited	Resentful	Despondent	Weak	Trusting	Hesitant
Free	Upset	Disappointed	Worthless	Powerless	Inhibited
Happy	Vindictive	Discouraged	Fear	Impotent	Incapable
Inspired	Courageous / Powerful	Forlorn	Afraid	Incapable	Resigned
Invigorated	Adventurous	Gloomy	Anxious	Trapped	Victim
Lively	Brave	Grief	Apprehensive	Tender	Calm
Passionate	Capable	Heartbroken	Frightened	Caring	Loving
Playful	Confident	Hopeless	Hesitant	Reflective	Self-loving
Radiant	Daring	Lonely	Nervous	Serene	Vulnerable
Refreshed	Determined	Longing	Panic	Warm	
Rejuvenated	Free	Melancholy	Paralyzed		
Renewed	Grounded	Sorrow	Scared		
Satisfied	Proud	Teary	Terrified		
Thrilled	Strong	Unhappy	Worried		
Vibrant	Valiant	Upset			
		Weary			
		Yearning			

Body Sensations

Achy	Contracted	Gentle	Numb	Shaky	Sweaty
Airy	Dizzy	Hard	Pain	Shivery	Tender
Blocked	Drained	Heavy	Pounding	Slow	Tense
Breathless	Dull	Hollow	Prickly	Smooth	Throbbing
Bruised	Electric	Hot	Pulsing	Soft	Tight
Burning	Empty	Icy	Queasy	Sore	Tingling
Buzzy	Expanded	Itchy	Radiating	Spacey	Trembly
Clammy	Flowing	Jumpy	Relaxed	Spacious	Twitchy
Clenched	Fluid	Knotted	Releasing	Sparkly	Vibrating
Cold	Fluttery	Light	Rigid	Stiff	Warm
Constricted	Frozen	Loose	Sensitive	Still	Wobbly
Contained	Full	Nauseous	Settled	Suffocated	Wooden



Better Together

(WPO Spring Regional)

Tuesday, April 4th, 2023

4:30pm-7:30pm

Ciel Creative Space
2611 Eighth Street
Berkeley, CA 94710

Coordinator/Host: Allison Tabor

Sponsor: LaSandra Hunt, JP Morgan Chase

Venue Host: [Cecilia Caparas Apelin](#)

Photographer: [Lara George](#)

Musician: [Gary Muszynski](#)

Caterer: [Red Door Catering](#) (Coordinated by Ciel)

Wine: [Jill Osur, Teneral Cellars](#)

Product Sponsor: [Julie Gordon White, Bossa Bars](#)

Guests: Estimated 60-75

Arrivals:

- Allison and Gary will arrive by 2pm (Carlos @2:15pm, Chloe @ 3:15)
- Photographer [Lara George](#) will arrive by 3:15pm
- LaSandra by 3pm
- Camille by 4pm
- Guests at 4:30pm

Allison Tabor



Better Together
(WPO Spring Regional)

Tuesday, April 4th, 2023

4:30pm-7:30pm

Ciel Creative Space
2611 Eighth Street
Berkeley, CA 94710

Allison Tabor

Registration table in Atrium:

- TWO 6ft tables with black tablecloths (Ciel): Chase to also bring two branded tablecloths for possible use.
- Chase to bring collaterals.
- Chase to bring all printed badges and extras. Allison to bring badge ribbons.
- WPO standing pop-up signage next to tables (Allison)
- WPO tabletop QR code signage and collaterals (Allison)
- Basket with BOSSA BARS and collaterals (Julie Gordon-White)
- Musician, Photographer and Wine collaterals
- Ciel Creative collaterals (or may have a separate table display)

Ciel Creative is providing the following equipment:

- Microphone and speakers (for announcements & member shares)
- Little Giant Up lights (WPO colors eggplant and gold)
- Registration tables (black tablecloths as backup)
- High Top Tables
- Sofas, chairs
- Rugs
- Plants
- Possible display area near the food for the Bossa Bars samples



Better Together

(WPO Spring Regional)

Tuesday, April 4th, 2023

4:30pm-7:30pm

Ciel Creative Space

2611 Eighth Street

Berkeley, CA 94710

Headshot Station Needs (will be stationary):

Studio 3 (has open access to Studio 4 (main room))

Cecilia: Do you have an easel, stand up sign holder or white board we can use to indicate :

Head Shots

- 7x10 space needed.
- Available outlet ideal
- Close to a wall ideal, in case group shots wanted.
- Will bring her own lighting/strobes and black background.
- Area where the sun isn't beaming down (windows are high so shouldn't be an issue)
- Everyone will get 3-4 headshots.
- Lara will provide 2 links to share with group; one with all headshots and another with event photos (mingling, music, candid, all others).



Better Together
(WPO Spring Regional)

Tuesday, April 4th, 2023

4:30pm-7:30pm

Ciel Creative Space
2611 Eighth Street
Berkeley, CA 94710

Event Schedule/Choreography

2pm-4pm Set-up / vendor arrivals /tech

4pm-4:30pm Pre-Event VIP photos (Chase Sponsor, WPO CEO Camille Burns
Hosts: Allison/Cecilia)

4:30pm Guests Arrive & Register (Ciel to provide registration table)
Chase to greet/host the table and have pre-printed name badges in holders. I will bring ribbons (4" horizontal) for "Sponsors", "Guests", "Facilitators", "VIP's" and "Host". Ciel to provide a greeter host at table as well.

4:30pm-5:15pm Music (Set One) Event Photography and headshots.

5:15pm-6pm Music on BREAK (until poem/exercise)

Welcome-Allison (5min):

Ciel will have microphone/riser set-up.
Ciel will have 100 egg shakers (Gary dropping them off on Monday before). Ciel to assist with distribution. Possible Ciel Swag bags.



Better Together
(WFO Spring Regional)
Tuesday, April 4th, 2023
4:30pm-7:30pm
Ciel Creative Space
2611 Eighth Street
Berkeley, CA 94710

Thank you's (Allison Cont'd)

- Event Sponsor: LaSandra, JP Morgan Chase
- Venue host: Cecilia
- Musician: Gary Muzynski

Gary is a leadership and team development consultant, an experience designer and facilitator who helps companies, boards, and teams to harmonize and work more effectively together through the magic of music. He will be joined by Carlos Caminos on guitar and Chloe Scott Jones on flute.

- Photographer: Lara George
- Wine: Teneral Cellars, Jill Osur
- Bossa Bars: Julie Gordon White

Introduce CC's: (Allison Cont'd)

- Linda Graebner, EB
- Teri Eyre, SF
- Ann Tancio, SV
- Juli Betwee, Platinum
- Brenda Wade, Platinum
- Myself: DV, GB & Platinum V



Better Together
(WPO Spring Regional)
Tuesday, April 4th, 2023
4:30pm-7:30pm
Ciel Creative Space
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Berkeley, CA 94710

Allison to Introduce Camille

Camille Welcome (5min)

Allison introduces *Better Together*, Member Feature Stories: (15-20min)

- DV- Jill Osur (3min)
- GB- Stacy Crinks (3min)
- SV- Lauren Aguilar (3min)
- EB- Nina Cooper (3min)
- SF- Juliana Sommer (3min)
- SF- Krista Mitzel (3min)

Allison to Read WPO Poem with Gary's music (3min)

(After "Gary will now do something to help us find our flow/groove as a group, with music").

Gary leads Musical Interactive Exercise with Egg Shakers (10 min)

Allison to remind everyone to visit headshot station.

Back to networking and music (Music Set Two).



Better Together
(WPO Spring Regional)
Tuesday, April 4th, 2023
4:30pm-7:30pm
Ciel Creative Space
2611 Eighth Street
Berkeley, CA 94710

6:00pm- 7:30pm Networking & Headshots

Music Set Two 6:00- 6:45pm

Gary to take music break 6:45pm-7:05pm and play recorded music.

Music Set Three 7:05- 7:30pm

7:30pm+ Photographer on hand until 8pm

Allison Tabor



Home



My Network



Jobs



Messaging



Notifications



Me

**Allison Tabor, CPC, Dynamic Speaker and Award Winning Facilitator**

Guiding business owners, leaders and teams to communicate better, get farther faster, and stop working so hard in business and in life.

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Guiding business owners, leaders and teams to communicate better, get f...

3mo • 🌐

"Better Together" proved to be more than just a theme for our [Women Presidents Organization](#) (WPO) Bay Area regional mixer!

What a great evening in community with members from five bay area WPO chapters, facilitator colleagues ([Ann Badillo](#), [Teri Eyre](#), [Linda Graebner](#), [Juli Betwee](#), [Dr. Brenda Wade](#)), and guests, including VIP [Camille Burns](#) our WPO CEO visiting from NYC, in support and leadership.

We gathered at a WPO member's beautiful venue, [Ciel Creative Space](#), for an evening of networking and camaraderie.

A few members shared in mini-TED talk style, their inspiring Better Together stories ([Stacy Crinks](#), [Krista L. Mitzel \(she/her\)](#), [Jill Osur](#), [Lauren Aguilar, PhD](#), [Juliana Choy Sommer](#), [Nina Cooper](#)), while we sipped [Teneral Cellars](#) wine and sampled member [Bossa Bars Menopause Energy Bars](#), [Named an Oprah Daily Best Menopause Product!](#) All this with while being entertained by world class music led by [Gary Muszynski](#). To top it all off, we had so much fun getting our headshots updated, thanks to a WPO favorite photographer, [Lara George](#).

Extra special thanks to [Cecilia Caparas Apelin](#) for hosting us in the the most perfect place and to [LaSandra Hunt](#), who generously sponsored our evening and continues to generously support the WPO and other women in business.

Indeed we are Better Together! [#WPO](#) [#BetterTogether](#) [#womenbusinessowners](#)

2023 WPO UK Annual Schedule												
	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Renewal Month	Birmingham	-	-	-	-	-	-	London	-	-	-	-
Number of confirmed Members	7											
Learning Theme	STRATEGY			FINANCE			SALES & MARKETING			LEGAL/HR		
Learning Activity Birmingham	Sharing of strategy models	Sharing of key areas of Strategy plans	Review of work and success on Strategy plans	Fahreen Meghani Accountant - Ffieside Chot	Feedback and Actions	Feedback and Actions	Liquid PR - Social Media and Marketing	Feedback and actions	Feedback and actions	TBC		
WPO Birmingham Chapter Meeting Dates												
Birmingham Venue												
WPO Birmingham Chapter Meeting Guests												
Number of confirmed Members	6	9										
Learning Theme	STRATEGY			FINANCE			SALES & MARKETING			LEGAL/HR		
WPO London Chapter Meeting Dates	11th Jan	8th Feb	8th Mar	12th Apr	17th May	14th Jun	12th Jul	16th Aug	13th Sep	11th Oct	8th Nov	6th Dec
Format	Zoom	In Person	In Person	In Person	In Person	Zoom	In Person		As Per new Agreement			CHRISTMAS
London Venue	UJC	Drummonds	Union Jack Club	X Forces	RETREAT		X Forces					-
WPO London Chapter Meeting Guests	Michelle Booyson			Siwan Griffiths.								
1 hr Joint UK Peer sessions for learning and sharing												
Social Events							Birmingham and London Drinks					
Retreats					London Spring Retreat	Birmingham Moxhall Event						
Recruitment										London Extraord		
Conferences / Events		Drummonds Dinner 8th Feb London			10-12 May Las Vegas (Members)			2nd - 4th August Chapter Chair Training				
							Cleveland Ohio					



Succession Planning vs Exit Planning

Both are strategies that businesses can use to prepare for changes in leadership or ownership. Goal and mechanics are different, exit planning can include succession planning.

	Succession Planning	Exit Planning
Key Driver	Pipeline of talent	Shareholder value
Goal	ensure that the company has a pipeline of talented individuals who are ready to step into leadership roles when needed	maximize the value of the business and ensure a smooth transition of ownership.
When Used	company is planning for the retirement or departure of key executives or other high-level employees	owner is planning to retire or otherwise exit the business
Outcome	identify and develop employees within company with the potential to fill key leadership positions in the future	developing a strategy to sell or transfer ownership of a business



Valuation Drivers (Breakouts)

Two companies: Mom & Dad Shop; Brothers & Sisters Inc.
 Both: are in the same industry
 Brothers & Sisters Inc: has a much higher valuation than Mom & Dad Shop.

The only information you have is each of their annual revenues & EBITDA. What other factors could influence the valuation?

Activity – 25 minutes

1. Break-out into groups of 4
2. Put yourself in the shoes of the 'buyer'.
3. Identify additional factors that drive valuation and why.
4. Detail the differences in the respective company's column.
5. Choose a spokesperson and present to the group.

Mom & Dad Shop Valuation = 1x EBITDA	Brothers & Sisters Inc. Valuation = 4x EBITDA
\$120 Million in Annual Revenue	\$50 Million in Annual Revenue
\$10 Million EBITDA	\$10 Million EBITDA



Readiness Assessment – (Take Home)

Take a moment to assess your company's "exit readiness". For each of the listed value drivers score your company as 1 (weak), 2 (average), 3 (strong) as well as the respective weight (low, med, high) on your company's value. (NB Goal for Exit Ready = 45 or higher; Focus Efforts on Heavier Weighted Factors to Better Differentiate.)

	Score (1, 2, 3)	Weight (Low, Med, High)
Strategic-Exit Plan (Buy-in by Owners, Managers & Team)		
Annual Operating Goals & Actions		
Compensation Tied to Operating Goals		
Key Indicators Tracked Monthly		
Competent, Respected, Supported CEO		
Depth of Management (Sideways & Top-to-Bottom)		
Succession Plan/Professional Development Plans Defined		
Succession Plan/Development Plan in Play: Candidates Identified, Skills Assessed, etc.		
Proprietary Processes, Products, IP, etc.		
Diverse Customer Base: Revenue Spread, Customer Age		
Depth of Product Lines		
Audited Financial Statements		
Internal Systems & Controls Defined & Followed		
Automated Processes (A/P, A/R, etc.)		
Corporate Growth Rate (profit, new customers)		
Brand Recognition		
Corporate Governance Defined, Healthy & Followed		