

WPO Inheriting a Chapter

Leading the Refresh
March 2026

AGENDA – 90 min

Meet them where they are (months 1-3): Honor existing Chapter culture. Build trust with members (individually & collectively).

Take them where they need to be (months 2-6 or longer): Gently begin culture shift. Introduce PeerView, or bolster process as needed.

Re-freshing



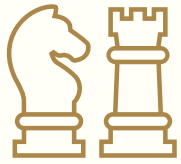
Appreciating the Chapter – Observe Meetings



Goal: Build trust and familiarity. Help them feel seen and heard.

- **Look & Listen:** Watch the dynamics and emotional tone. Identify the bright spots and possible detractors.
- **Ask:** What's working well in your chapter? What would make your WPO experience more valuable?

Appreciating the Members - One to One Meetings



Goal: Relationship building to understand individual needs and expectations.

Ask: What's working well in your chapter? What would improve the value for you?

- Conduct a consistent interview. You are gathering data.
- Follow-up with a quick summary of what you heard.

Appreciating the Members & Chapter - Survey



Goal: Opportunity for anonymous feedback

- **Survey to explore:** meeting format, content, attendance, logistics, trust, value etc..
- **Share:** Be transparent. Share results back to the group and review how they could shape next steps.

Appreciating the Members & Chapter – Predictive Index



Goal: Use PI to help understand both individuals **AND** the group dynamic.

Helps to understand communication styles and preferences. For example, who:

- prefers autonomy vs process
- might be prone to interrupting
- is most likely to prepare their Updates

Co-Create the Future

- Have a clear goal in mind
- Allow the data to tell the story
- Invite members to help design the changes
- Start small



Normalizing Attrition

- Loss can actually mean gaining alignment
- Reduced numbers can allow for a more comfortable re-build



(Re)Intro PeerView



- Acknowledge legacy.
- Illustrate value of PeerView – show through practice if theory doesn't translate.
- Tap into real-life examples (1-1's may shed light on who has had a positive, valuable PV experience).

(Re)Introducing PeerView

PEERVIEW™

1. BUILD TRUST

Timed, succinct update with emphasis on significance and emotion related to key updates.

MEMBER
UPDATE

3. INFORM

Insight into the key issue and desired outcomes. Sets members up to support the presenter.

PRESENTATION

5. LEARN AND GROW

Fosters learning and drives next steps. All members can benefit.

EXPERIENCE
SHARE

7. FOCUS ON FUTURE

SMART mini goals for monthly accountability and continuity.

ACCOUNTABILITY

2. NARROW FOCUS

Process of choosing the highest priority issue for the group to collectively work on.

ISSUE
SELECTION

4. DIVE DEEPER

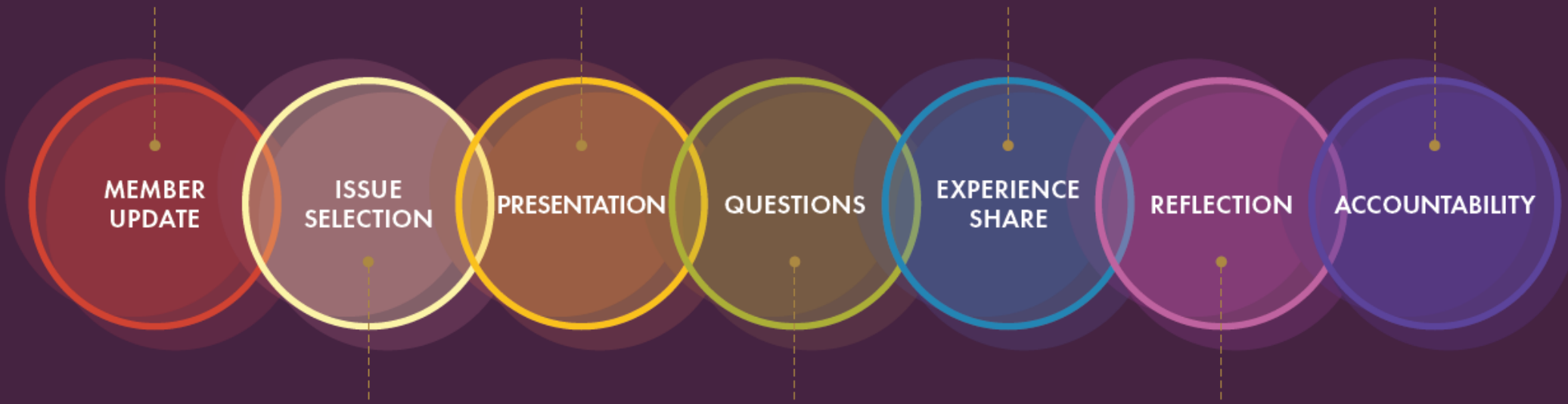
Provokes deeper thought and stimulates ideas. It can also hint at experience share.

QUESTIONS

6. EMBED LEARNING

Reflection on learnings, feelings, and next action steps. All members can participate.

REFLECTION



Your 6 Month Refresh Plan



Get to know members individually & the chapter dynamic (1-1, PI, Survey, meeting observation).



Appreciate what they want from their WPO investment. And what they are willing to commit to the chapter.



Co-create a plan with members (plan for next 6-12 month. Set Norms).



Validate and celebrate small wins to reinforce success.