WPO PeerView™ Member Update Form –
How to Guide for Chapter Chairs

This guide will walk you through **Member Updates** – the 1st step in the WPO PeerView™ meeting model – Here are the 7 steps in WPO PeerView™

Step	**Purpose**
1. Member Updates	Using the Update Form, members share updates to foster connection, identify challenges and opportunities for collective support.
2. Issue Selection	Members select an issue or opportunity to focus on.
3. Member Presentation	One member presents their challenge to share context and desired outcomes.
4. Questions	Members ask open-ended, divergent questions to deepen clarity.
5. Experience Share	Members share relevant experience to support the Presenter.
6. Reflection	The Presenter reflects on their learnings and next steps. It's optional for members to share their learnings, if time allows.
7. Accountability	Members share and hold each other accountable for monthly commitments.

WPO PeerView Step 1 – Purpose of Members Sharing Updates is to:

1. **Create shared context & continuity -** Ensure the group stays informed about each member's current reality. It connects the dots from one meeting to the next, reinforcing progress, patterns, and accountability over time.

2. **Strengthen trust -** By sharing both business and personal updates, members model vulnerability, empathy, and trust - critical ingredients for a high-performing peer group.

3. **Encourage reflection -** Preparing a guided 3-minute update supports members to step back from the day-to-day and reflect on what matters and how it impacts them and their business.

4. **Surface high-value issues and opportunities -** A succinct update reveals what is most pressing, and helps to surface topics through a simple and equitable process.

5. **Help the Chair sense group energy & trends –** Member Updates allow the Chair to quickly read the room: who is thriving, who is struggling, and what themes might require attention. This helps with proactive support and facilitates issue selection.

6. **Model discipline & respect for group time -** The time-boxed structure helps to model discipline and encourage clear succinct communications.

WPO PeerView™ Member Update Form – How to Guide for Chapter Chairs

How to Facilitate the Member Updates Step:

How and when Members can complete the Update Form:

- **Pre-work:** 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.
- **Impact vs details:** 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.
- **Share what you can:** 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).

Process reminders:

- **Predictable order**: Follow a 'round table' approach (i.e. go in a circle) for Member Updates, so that everyone is clear on the order.
- **Timing:** 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).
    - 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).
- **Process flow:** Discourage interruption or group discussion during updates. It is an opportunity for each member to have a focused and attentive audience.
    - 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.

WPO PeerView™ Member Update Form –
How to Guide for Chapter Chairs

Recommended facilitation tools:

- Provide **name tents** to support members to get to know each other.
  - Include their Predictive Index profile if available.
  - Use the inside of the name tent for goal setting, word of the year, or to print the Great Questions Guide.
- Use an **audible timer** to help you stay on track with timed updates (3-5 minutes).
- Pass around a **Post-It Note** pad and ask members to note their issues in their own words.

Facilitation Tips for Chairs:

- 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.
-

Facilitation Tip for Members:

- 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.
- Please see page 4 for completed sample of Member Update Form

Following is a sample of a completed 'WPO PeerView™ Member Update' form to give you a sense of what to expect from members.

{COMPLETED SAMPLE}: WPO PeerView™ Member Monthly Update (today's date: *May 5, 2026***)**

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. See Step 7 – **Accountability**, for details.

==

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.*

Next Steps in the WPO PeerView™ Process:

2. **Issue Selection** – Once all members have shared their updates, guide them to identify the top issue by placing their post-it on an Eisenhower Matrix and voting with initials or check marks. You can also facilitate a brief discussion to choose the top priorities. For virtual meetings, use the chat or a quick poll to collect votes.
3. **Issue Presentation** – Once the issue is selected, the member completes Part I of the Presentation Guide template.
4. **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.
5. **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.
6. **Reflection** – The issue holder answers **Part II of the Presentation Guide**, to offer what resonated for them and they plan to apply their learning or what actions they plan to take. The final question challenges the member to share a future vision of what success looks like – ie. Outlining what the ideal outcome is at this time next month or in the longer term.
7. **Accountability** – Members share a monthly commitment, using the SMART criteria. This helps members bond and feel accountable to the group.