

# **Forum for the Future**

**How to Plan and Execute a Successful Forum Experience**

**Hollis Lessons Series**

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# Agenda

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- Basics of Forum
- Who Am I
- My Why for..
- What's the Problem
  - A Solution
  - Primary Differences
  - Keys to Success
- Retreat Plus
- Summary
- The What-Outcomes

## **Who is this for:**

Forums that have existed for a while and realize their approach is not sustainable. Members are bored, disengaged and/or dropping out.

## **Objective:**

Share another approach to Forum management that integrates principles of execution and modern technologies.

# Basics of a Forum

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- **Forums**

- A small group of aligned individuals that are willing to abide by a constitution that requires Commitment, Confidentiality and Trust
- Think Mastermind group, Special Board of Advisors, or small group

- **Why Exist?**

- Being an entrepreneur (or business leader) is a very isolated role
  - You have very few people that you can confide your entire concerns, fears and aspirations
- Forums are an effective strategy to have an outlet to share and learn
  - With Trust and Commitment by all, the Forum experience can be the most valuable resource in your life.

- **What you get with a great forum experience?**

- You build another family that knows you better than anyone
- You have real friends that you can count on for the big challenges of life

# Who Am I?

## For this discussion..

- I'm an Entrepreneur and Business Leader

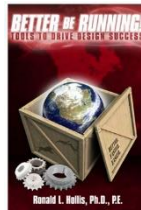
## Which means

- I don't like people to tell me what to do
- I am very confident in my abilities
- I hate to waste time
- I always believe there is a better way

## My Passion

Leverage the power of business to positively affect people

Implementing and Executing Systems of Business to increase optimization of the organization



## Engineer by Training- Business Builder by Passion

- **Boeing-** International Space Station (1990)
  - Systems Engineer and Design Engineer (Designed the Hatch Tracks on station now)
  - **Lesson Learned:** Appreciate systems and processes...they are the only way to allow a large organization to execute, adapt and grow

*Discovered CAD, Internet and 3D Printing at the birth, so spent the 90's as a Tech Geek trying to commercialize 3D Printing*
- **Fastec**
  - 20-year-old family business in manufacturing
  - Broken, stubborn and pre-death company that required massive overhaul
  - **Lesson Learned:** Sometimes emotional decisions are made even when rational decisions are obvious
- **Rapid Tech Engineering (Founder)**
  - Engineering and Manufacturing Services
  - **Lesson Learned:** Focus and competitive advantages are the key to being the best

*1998- Made conscious decision to be a Business Leader*
- **Quickparts.com (Founder, President & CEO)**
  - In 1999, we committed to use technology and innovation to change the custom parts market
  - **Lesson Learned:** Being part of a team of achievers makes business fun even when things are tough!
- **Since 2011...**
  - Worked with CEO's to solve major business problems in Strategy and Organizational Management

# My Why for....

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- I have been in a forum for 20 years in EO and YPO
  - My first forum training was January 2000.
  - I was told many things, including my forum would be my pallbearers
  - I have been in 3 forums since (2 were EO forums)
  - My current forum is a YPO forum
    - Been together for 16 years
    - Started with 10 and down to 6 with periodic ups and downs
    - Focused on executing the long-term promise of forum to finish life with each other
- I believe in the value of a Strong Forum to help you learn, grow and be more effective in life (both from learning and observing other life experiences)
- I want my current forum to last the rest of my life and be available to my family after I am gone.

**My WHY is to design and share a Forum System that is sustainable to ensure each forum member receives adequate value in exchange for their time, participation and commitment.**

# What's the Problem

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- I believe the traditional forum, which was designed by YPO and adopted by EO, lacks an effective structure and process to be sustainable for decades with the current lifestyles of entrepreneurs and executives.
- The Forum experience requires more diversity in process, planning and execution.
- A key to success for the Forum experience is to obtain value from *forced interconnectivity* among the forum members

**How to design a forum experience that can provide appropriate value to the members and last a lifetime?**

# A Solution

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**Design a system and format which forces interconnectivity between forum members with alignment on the expected forum experience.**

# Primary Differences (old vs. new)

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- Differences between a traditional forum and the proposed updated approach
  - **Structured Retreat Process**
    - Forum process to develop a plan, calendar and processes to execute the forum
  - **Strategic Plan**
    - Strategic operating plan based on the Priorities, Strategies and Goals of the Forum for the upcoming year
  - **Meeting Regiment**
    - Versatile meeting that uses virtual and physical meetings to drive interconnectivity
      - Traditional forum is 10 meetings per year for approximately 4 hours per meeting. New is 12 meetings per year with various lengths and mediums based on the agenda

# **Keys to Success** for a Positive Forum Experience

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- **Forced interconnectivity**
  - People are busy, so they must be forced (and committed) to interact with their forum mates to connect
- **Be a Team**
  - Emotional connection, trust, positive conflict, resolution and commitment
- **Adaptation to the phases of life of the members**
  - People mature and diversify their life (kids, empty nesters, etc.)
- **Documented Strategic Plan from the Annual Retreat**
  - Forums must be planned annually with a complete and aligned Strategic Plan and process review

**All members must be present, involved  
and committed before leaving the retreat**

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**Let's Get Started!**

**The following is the  
Dixie 7 Forum Process**

# Keys to the Annual Retreat

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- An executed Annual Retreat is the 1<sup>st</sup> step
  - Preparation
  - Planning
  - **Process**
  - Updates
  - Socialization and Bonding

# Kickoff and Agenda



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## Let's Get Started!!!

- Confidentiality
- Hands-In

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## Agenda

- **3PM Wednesday (5/20/20)**
  - Confidentiality
  - Hands-In
  - Agenda Review
  - Opening Exercise
  - Forum for the Future
  - Strategic Plan for 2020-2021
- **6PM Adjourn for Drinks/Dinner Prep**
- **7PM Dinner and Updates**
- **8:30AM Thursday (5/21)**
  - Strategic Plan for 2020-2021
  - Calendars
  - Process Reviews
  - Wrap-up/Housekeeping
- **3PM Adjourn**

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## Opening Exercise

**What is most important to you for YOUR Forum experience? Or (What MUST you get out of Forum to make it worth your energy?)**

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# Guideline Review for Forum

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## Guidelines for Forum

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- An effective forum requires regularly forced interconnectivity among the members
- Virtual meetings with video conference is acceptable interconnectivity
- Physical meetings are always available for anyone that needs them
- Commitment to the forced interconnectivity is critical for the long-term success of the forum
- Physical interactivity is required at least quarterly
  - Location should rotate among areas to align with external experiences
- Strategies for Forced Interconnectivity
  - Physical meetings
  - Virtual meetings
  - Overnight Retreats/Trips
  - Annual Retreats
  - Weekly Update Emails
  - Monthly Updates
  - 1on1 engagements (dine/phone/text/etc.)
  - Events

# Schedule Structure

## Proposed Forum Meeting Structure

- 4 Physical Meetings (quarterly)
- 8 Virtual Meetings (monthly)

2020-2021	2020-2021 Calendar	Location	Date	Owner	Presentation	Presentation	Experience
May	Annual Retreat						
June	Virtual Meeting- Updates Only						
July	Physical Meeting-1 overnight-experience- 2 Presentations						
August	Virtual Meeting- Updates Only						
September	Virtual Meeting- Updates Only						
October	Physical Meeting-1 overnight-experience- 2 Presentations						
November	Virtual Meeting- Updates Only						
December	Virtual Meeting- Updates Only						
January	Physical Meeting-1 overnight-experience- 2 Presentations						
February	Virtual Meeting- Updates Only						
March	Virtual Meeting- Updates Only						
April	Physical Meeting-2 overnight-Retreat- Forum Planning-experiences						
Guidelines 1 overnight schedule: Arrive by 5PM/Dinner at 7PM/Updates/Start 8AM next day/ Adjourn by 5PM next day 2 overnight schedule: Arrive by 5PM/Schedule with 2 overnights/Adjourn by 3PM last day Virtual Meeting- Use published virtual meeting room/Have working video-audio/arrive early to verify functionality/stay focused (no email/web)/3 hours Owner coordinates lodging and meeting accommodations, dining, experience, etc.							

# Strategic Plan with PSG

## 2020-21 Forum Strategic Operating Plan

Purpose: Working matrix to allow the complete planning and discussion for a forum year

Elements of Forum	Priority	Strategy	Goals (for Forum Year)
Self Growth	Self-Growth through Learning		
		Have educational presentations	Have 3 educational presentations within the forum
			1
			2
			3
		Have experience trips	Have 3 forum trips with experiences
			1
			2
			3
		Have family member present	Have 3 family member presentation
Help Members	Maintain connection with each other		1
		Weekly email or text updates by all members	By 9PM Monday, Email of infobit (share location, lesson, challenge, anything)
		Monthly Updates	Each member provide a pre-prepared emotional update each month
Growth as a Family	Deeper knowledge of each other	Each member Shearn, LifePlan, Deepdive, Presentation during year	Each member present at least 1 time
Growth as a Family	Quantity Time		
		Celebrate milestone events	Make forum aware of events
		Meetings	Have meeting each month
		Integrate family members together	Build group text for all
Growth as a Family	Committed Quality Time		
		Forced Interconnectivity	At physical meeting, each member provide at least 1 thing that is working well and 1 thing we can do to improve the forum experience

# Process Review

## Forum Processes Review

Forum Process Information in on Dropbox in the Forum Process Folder

- Agendas
  - Monthly Virtual Meeting
    - Use published virtual meeting room
    - Have working video-audio/arrive early to verify functionality with headphones
    - Stay focused (no email/web)
    - 3 hours
  - Quarterly Experience
    - 1 overnight schedule: Arrive by xPM/Dinner at 7PM/Updates/Start 8AM next day/Adjourn by xPM next day
- Forum Update Worksheets
  - Focus on the Top/Bottom 5% you can't share with others
- Presentations
  - Best Practice: Use a coach
- Shearing Process
  - Sharing about your life so we have deeper relationship
  - Teach something to others for their learning

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## Forum Processes Review

- Issues Clearing Process
  - Process map in the folder
- Hands-in Exercise
  - Added to Agenda to start each meeting
  - Key is to use to set expectations for time needed for update
- Meeting Moderation
  - Start meetings on-time
  - Distribute Agenda
  - Support Presenters and Experience Owners

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## Forum Processes Review

- Parking Lot Process
  - Managed by the Moderator
  - Reference for future member presentations
- Weekly Update Process
  - By 9PM Monday, Email or text information bit (share location, lesson, challenge, anything)
- Constitution Review
  - Comments
    - Added physical and virtual adjective for meetings that we commit to attending. Also, if scheduled, then expected to be attended
    - Defined the Annual Retreat as main meeting in which roles are changed and it is mandatory to avoid immediate dismissal
    - Confidentiality section did NOT change....Legacy information
  - Updated and Accepted
- Meeting Dates and Topics
  - Calendars (should be complete by now)

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# Process Review and Wrap-Up

## Forum Processes Review

### ➤ Roles

- Moderator: Ron
- Vice Moderator: Emily
- Treasurer: Russell
- Historian: Emily

### ➤ Forum Scorecard Review

- At physical meeting, each member provide at least 1 thing that is working well and 1 thing we can do to improve the forum experience

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**Do not conclude the retreat until there is 100% VERBAL commitment by each member to be accountable in executing the Strategic Plan and Processes**

## Wrap-Up and Housekeeping

### ➤ Wrap-Up

- Any open items or topics for discussion

### ➤ Housekeeping

- Next Meeting: June 16 at NOON
- Retreat Review
  - At physical meeting, each member provide at least 1 thing that is working well and 1 thing we can do to improve the forum experience

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# Summary of Forum for the Future

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- **Planned and Executed Annual Retreat**

- Build the plan
- Review the Processes
- Re-commit by all

- **Formal Strategic Plan**

- Leverages the power of forced interconnectivity

- **Adapted Calendar**

- Aligned with the members phases of life

# The What- Outcomes

- Highly aligned plan for the forum experience for the upcoming year
- Accountability metrics to measure to avoid “subjective assessment” of the forum value
- Transparency of the forum experience expectations
- Flexibility to shift the forum to align with the phases of life of the forum (adapt to life)
- Gives all a voice in the process and ensures verbal commitment to the process



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# Questions?

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