

New Core Group Checklist

Core Group # ____

This document provides tips, reminders, and resource links for all of the things you need to do when you're matched with a new group. As always, if you have any questions, please email guides@chief.com.

OVERVIEW

Use the checklist below to guide you as you kickoff a new Core Group. For detailed guidance for each checklist item, scroll down to the "Detailed descriptions" section.

You've
been
matched!

- ☐ Learn more about your assigned Core Group through your [Guide Portal](#)
- ☐ Send a ["hello" message](#) to your group(s)
- ☐ Review the member [Core Expectations and FAQ](#) pages on chief.com
- ☐ View the Core Homepage to confirm if any members are Core Premium Members and use the guidance on the [Core Premium Advisory](#) page to plan future comms and scheduling for advisory sessions.

M1

BEFORE MEETING

- ☐ Review and prepare for Meeting 1 using the [M1 Facilitation Materials](#)
- ☐ Download the M1 invite and add to your calendar
- ☐ Test the Zoom link in your calendar invite and claim host
- ☐ Submit a [meeting agenda](#) for M1
- ☐ Familiarize yourself with what's coming up at Chief - check out the [Announcements](#) and [Events](#) pages for things that might interest your group members
- ☐ Review the [Wrap Slides](#)

AFTER MEETING

- ☐ Submit [group attendance](#) in the Portal
- ☐ Post the member [meeting summary](#) in the Portal
- ☐ Submit the Chief [post-meeting recap](#) in the Portal
- ☐ Review and summarize your notes from the meeting, making note of information you want to remember from M1
- ☐ Submit your [invoice](#) (aggregated monthly invoice for all meetings)

M2

BEFORE MEETING

- ☐ Review and prepare for meeting 2 using the [M2 Facilitation Materials](#)
- ☐ Download the M2 invite and add to your calendar
- ☐ Review your notes from the previous meeting, looking for themes, items to follow-up on, or other connection points
- ☐ Submit a [meeting agenda](#) for M2
- ☐ Familiarize yourself with what's coming up at Chief - check out the [Announcements](#) and [Events](#) pages for things that might interest your group members
- ☐ Review the [Wrap Slides](#)

AFTER MEETING

- ☐ Record [group attendance](#) in the Portal
- ☐ Post the member [meeting summary](#) in the Portal
- ☐ Submit the Chief [post-meeting recap](#) in the Portal
- ☐ Review and summarize your notes from the meeting, making note of information you want to remember from M2
- ☐ Submit your [invoice](#) (aggregated monthly invoice for all meetings)

M3

BEFORE MEETING

- ☐ Review and prepare for meeting 3 using the [M3 Facilitation Materials](#)
- ☐ Download the M3 invite and add to your calendar
- ☐ Review your notes from the previous meeting, looking for themes, items to follow-up on, or other connection points
- ☐ Submit a [meeting agenda](#) for M3
- ☐ Familiarize yourself with what's coming up at Chief - check out the [Announcements](#) and [Events](#) pages for things that might interest your group members
- ☐ Review the [Wrap Slides](#)

AFTER MEETING

- ☐ Record [group attendance](#) in the Portal
- ☐ Post the member [meeting summary](#) in the Portal
- ☐ Submit the Chief [post-meeting recap](#) in the Portal
- ☐ Review and summarize your notes from the meeting, making note of information you want to remember from M3
- ☐ Submit your [invoice](#) (aggregated monthly invoice for all meetings)

M4+

BEFORE MEETING

- ☐ Review and prepare for meeting 4+ using the [M4+ Core Themes](#) facilitation guides and peer advisory resources*.
- ☐ Download the M4+ invite and add to your calendar
- ☐ Review your notes from the previous meeting, looking for themes, items to follow-up on, or other connection points
- ☐ Submit a [meeting agenda](#) for M4+
- ☐ Familiarize yourself with what's coming up at Chief - check out the [Announcements](#) and [Events](#) pages for things that might interest your group members
- ☐ Review the [Wrap Slides](#)

AFTER MEETING

- ☐ Record [group attendance](#) in the Portal
- ☐ Post the member [meeting summary](#) in the Portal
- ☐ Submit the Chief [post-meeting recap](#) in the Portal
- ☐ Review and summarize your notes from the meeting, making note of information you want to remember from M4
- ☐ Submit your [invoice](#) (aggregated monthly invoice for all meetings)

NOTE

At times, you might use different content materials to deliver a meeting, including: [M10 Looking Back & Looking Ahead](#), [Core Candor](#), or materials from the [additional meeting materials](#) page.

DETAILED DESCRIPTIONS

In this section, you'll find detailed descriptions for each of the checklist items above.

YOU'VE BEEN MATCHED WITH A NEW CORE GROUP!

Learn more about your assigned Core Group through your Guide Portal

Once you've been notified of your new Core Group, your first task is to learn more about your Core Group members by visiting Chief.com and clicking on "Core" then selecting the Core Group number you'd like to view. There you will be able to view member information, including: member emails, membership start dates, individual Chief goals, and individual Core goals.

Next, please review each member's Chief profile by clicking on their photo in the dropdown list. From there, you can view their LinkedIn profile by clicking on the LinkedIn icon under their photo. We recommend you spend some time learning about each member, such as their title, the name of their company, what industry they work in, and any other information they've shared on their Chief profile or LinkedIn. It is not required that you do a deep dive into each person's work history, rather, have a general idea about their role and company prior to your first meeting.

If you'd like, please send a connection request (with a brief note mentioning that you're their new Core Guide) now or after your M1.

Send a "hello" message to your group(s)

Within 2-3 days of receiving notice of your new Core Group, please send a brief introduction email or message through the Chief app to say hello and introduce yourself to the group. Below is an example of email copy that you can use. Please feel free to adjust this email to represent your personality and tone.

Hello!

Welcome to your Core Group! My name is [Name] and I'll be your Core Guide. I'm looking forward to meeting you all during our first Core Group meeting on [day and time]. Please take a moment to download the calendar invite to your personal calendar by visiting the Core tab on Chief.com and clicking on the "Add to Calendar" button. There you will find the Zoom link [insert link] you will use to join our meeting.

Here's a bit about me:

[brief 2-3 sentences about your background, your facilitation style, and why you are drawn to Chief's mission and excited to be this group's Guide]

Core Groups can provide transformational experience for our members. To get the most out of your experience, I encourage you to come to Core meetings open-minded, honestly, and with a willingness to share and receive. This requires trust, candor, and openness on every member's part. I am excited to start this journey and meet each and every one of you soon!

*Best,
[Guide name]*

Review the member Core Expectations and FAQ pages on chief.com

Review the [Core Expectations](#) and [FAQ](#) pages on chief.com. These pages will inform you of the expectations, policies and general information that is shared with the members of your group. This is also a great place to direct your members for any Core related questions that might arise during your meetings. For any questions related to Core or their Chief membership please direct members to reach out to concierge@chief.com.

BEFORE EACH MEETING

Review and prepare for the upcoming meeting using the facilitation materials provided on [ChiefGuides.com](#)

The [Meeting Materials](#) page contains all the information you need to prepare for each meeting. Here, you have access to detailed facilitation notes and member presentation decks.

Download the meeting invite and add to your calendar

Add Core meetings to your calendar through the Guide Portal. If you'd like, you can sync your calendar with the Chief website by clicking on your profile picture, then scroll down until you see Calendar Settings, and click Connect Calendar. This will add all Core meetings to your calendar along with any event you RSVP to on the Chief website.

Test the Zoom link in your calendar invite and claim host

Prior to each meeting, test the Zoom link that is located in your calendar invite. The password should be embedded in the link, but if not, the password is CHIEFGREEN.

If you have any issues with your Zoom link please reach out to guides@chief.com prior to your meeting so we can ensure you are all set up.

Review your notes from the previous meeting (except M1)

Look for themes, items to follow-up on, or other connection points. Make sure you are familiar with the topics discussed during the last meeting so they are top of mind during your next meeting and identify areas where members might want to explore further.

Submit a meeting agenda

2-3 days before the Core meeting, Guides should [populate the meeting agenda](#) in their Guide Portal. Please see the [meeting materials](#) pages for suggested meeting agenda copy.

Familiarize yourself with what's coming up at Chief by viewing the Announcements and Events page on the Chief platform

Take a moment to review the [Announcements](#) and [Events](#) page to familiarize yourself with what's happening at Chief and identify upcoming opportunities that might be of interest to your Core Group members. You can view events in different locations on the Events page by utilizing the dropdown location menu and browsing different locations.

Review the Wrap Slides

Prepare to discuss the [Wrap Slides](#) for your upcoming meeting. You can choose to share them at the beginning of the meeting or the end. You may choose to slideshare or talk through them without displaying the slide. We encourage you to share any relevant links in the chat and via the meeting summary.

AFTER EACH MEETING

Submit group attendance through your Portal

Please [submit meeting attendance](#) within 48 hours of the meeting via the Guide Portal on Chief.com. Chief relies on attendance data to trigger automated processes that address disengaged members. By logging accurate and full group attendance, Guides provide Chief with the data it needs to support the Core service.

Post the member meeting summary in the Portal

Within 48 hours of the Core meeting, Guides should submit the [member meeting summary](#). The objective is to remind members of key takeaways, highlights from the meeting, and other important reminders and generate excitement for the journey to come and set expectations for the following meeting.

Submit the Chief post-meeting recap in the Portal

Please complete [Guide recap](#) within 48 hours of the meeting. This recap is a tool that allows the Chief to hear your perspective about the meeting and group dynamics. Your group will never see what you share in this recap. The Chief team uses the Guide recaps to surface trends, identify areas for future improvement, and understand overall Guide sentiment.

Review and summarize your notes from the meeting, making note of information you want to remember from this meeting

We encourage you to take notes during or directly after each meeting about the most important topics covered, items that individuals shared including areas they want to grow in, and themes that emerge from the meetings. These notes will be invaluable as you begin to prepare for your following meeting.

Submit your invoice

All new vendors should submit a copy of their W9 to accountspayable@chief.com for tax reporting purposes. Once you've done that, you will submit your invoices monthly, by the end of the month – containing all billable services for that month. Please send all invoices as a PDF to accountspayable@chief.com. The PDF must include: Guide's full name, phone number, email address, mailing address, Core Group number, meeting number, meeting date, and amount due. List each Core meeting as a separate line item.

Please note, all fees are payable thirty (30) days upon Chief's receipt of the invoice. If you have any additional questions email guides@chief.com.