

Meeting 2: Deepen Your Connection

Facilitation Guide

Optional accompanying resource: [M2 presentation deck](#)

Updated: September 2024

Meeting Focus

In “Meeting 2: Deepen Your Connection,” members will explore the group’s experience, expertise, and growth areas and continue to build real, authentic connections within this group. You’ll also facilitate an introduction to peer advisory that will help set the foundation for future Core meetings.

Chief's Approach to Facilitation

Guides are essential to the Chief member experience. Providing a consistently high standard of practice is an integral part of the Guide’s role. In order to support Guides in delivering a high quality experience, we are sharing [Chief's Definition of Excellence](#) for Core facilitation. It is important that you use the Definition of Excellence to guide your facilitation approach.

At key points in their Chief membership, members will be asked to provide [feedback](#) on their Core experience and your facilitation. These feedback prompts are aligned with the key components of the Definition of Excellence. We gather this feedback to help ensure members are getting the most from their Core experience and to identify ways we can support, train, and enable Guides to meet all members’ needs. If members share feedback on your facilitation specifically, Chief has mechanisms in place to share it directly with you.

Please review [all meeting materials](#), including this facilitation guide, carefully prior to facilitating your M2.

Reminders for Guides

- In almost all cases, **if a member is absent from M1 and M2, they will be removed from the group** and have the option to be added to a new Core Group during the next Coremation cycle. M1 and M2 are integral to the Core experience and we want to ensure members have the opportunity to fully participate in Core and for the group to build trust and connection early on. On rare occasions, Chief will make an exception to this policy, however, that is up to the Concierge team to determine if an exception will be allowed.

- **Confidentiality, vulnerability, adaptability, and trust are key** components of the Core experience. As a Guide, it is your responsibility to set the tone and uphold these commitments within the group.
- **Slides are provided** for your use, and we trust your discretion in determining whether and when to use them. Some members appreciate the visual cues that slides provide, while others prefer not to view slides during Core meetings. If you choose not to screen share slides, please use the Zoom chat to share discussion prompts in addition to sharing them verbally in order to create an inclusive and engaging space for all members.
- **Commitment is essential** for members to get the most out of their Core experience. We also know that sometimes conflicts arise for members. We encourage you to discuss commitment, especially as it pertains to attendance, early on in the Core experience. If you know ahead of time that attendance will fall below 50% OR 100% of the group wants to reschedule an upcoming date, please fill out the [rescheduling form](#). We also recognize that members will sometimes arrive late or leave early. We encourage open communication with you and your members so that you can provide the best accommodation for situations when that does happen.
- **It is important to drive members to opportunities outside of Core early on** to help them get the most out of their Chief membership. Use the information in the [Wrap Slides](#) to connect members with upcoming Chief events and encourage members to connect on the Chief platform and through LinkedIn. Wrap Slides can be shared via screen share or you can simply incorporate the content from the slides (upcoming programming and opportunities for members) into your in-meeting member talking points or communications.
- In M2, you can **share Wrap Slides at the beginning or end of the meeting** (both options are provided in the facilitation notes below) as well as via your post-meeting summary or other Core Group communications. M2 is also a good opportunity to ask members what Chief programming they've engaged with since the last meeting.
- **Normalize feedback** and [Core Candor](#) with your members. Feedback helps you adjust your practice where needed to deliver the best experience for members.
- **We have provided the [New Core Group Checklist](#)** that you can reference to guide your own workflow for each Core Group. Please leverage this resource to make sure you are fulfilling the expectations of your role as a Guide.
- **If you have questions about M2**, email guides@chief.com or crowdsource ideas from the Guide community on the [All Guides channel](#).

High-level Meeting Outline

Suggested Timing	Topic
5-10 min	Welcome
10 min	Align, connect, and maximize <i>*This can be done at the beginning or end of the session. Your choice! However, it only needs to be done once per meeting and we have allotted 10 mins within the run of show at the beginning OR at the end for this section.</i>
2 mins	Core Journey
3 mins	Review the 5 Cs
25 mins	Beneath the Surface Reflection
30 mins	Intro to Peer Advisory
10 mins	Closing reflection
10 mins	Align, connect, and maximize <i>*This can be done at the beginning or end of the session. Your choice! However, it only needs to be done once per meeting and we have allotted 10 mins within the run of show at the beginning OR at the end for this section.</i>

Detailed Facilitation Notes

Slide	Suggested Timing	Facilitation Notes
n/a	n/a	Pre-meeting reminders: • Log onto Zoom ~10 min prior to the session. If you run into any technical issues, please first ensure you're logged in to the Zoom account registered with Chief, and then contact guides@chief.com with 'URGENT' in the subject line if you need support. • Set up your tech to best support you. Turn off notifications and prepare your screen(s) so you can easily access your facilitation materials as well as see members' faces in gallery view. • Rename yourself on Zoom to include your full name and pronouns. • Take notes. Whether you take notes during the session or immediately after, it's essential that you make note of key moments and themes from the meeting so you can refer back to them in your meeting summary message and/or during future meetings. • AI Notetaker policy: Please note, AI Notetakers will not be allowed to join Core group meetings and Identity-based Community Conversations due to confidentiality. View Chief's AI Notetaker policy here.

n/a	5-10 mins	Welcome members by name as they join to create a warm and inviting space. If a member mentioned an important milestone in the last meeting, ask them how it went. Prompt members to share in the Zoom chat or verbally their response to the prompt: “If you had to describe how your day is going with a weather forecast, what would the forecast be and why?” or another welcome question of your choosing. (optional) Copy and paste in the Zoom chat: If you had to describe how your day is going with a weather forecast, what would the forecast be and why? The chat prompt is intended to help you get a sense of each member as they come into the Core space. If time allows, invite members to come off mute and expand on what they shared in the chat. (if applicable) New member(s) introductions. If you have any new members in M2, use this time to welcome them to the group and complete a quick round of introductions by asking everyone to share their name, pronouns (optional), role, and company and their answer to the opening prompt question. Depending on group size and number of new members present, you can choose to have everyone share their responses verbally or have returning members share their responses in the chat and invite new members to share verbally. Either way, make sure you facilitate a warm introduction for the new group member(s) so that they and the rest of the group can begin to gel.
Wrap Slides (optional slide share)	10 mins	Align, connect, and maximize* Take a moment to align on a few key aspects of the Core experience: attendance, feedback, and maximizing the Chief experience. You can use this opportunity to discuss: • Core meeting schedule - Check to make sure everyone can view their upcoming Core meeting dates on their Core homepage and remind folks to add the meetings to their calendars. You can use this time to remind them of their commitment to themselves and to the group and encourage them to share as early as possible if they have a known conflict for a future Core meeting. • Feedback - remind members that they will have many opportunities to share feedback with Chief, whether it’s through the post-meeting feedback survey (CSAT), connecting with the Concierge team, or other surveys they will receive throughout their Chief membership. Encourage them also to share feedback with you directly as you want to make sure they’re getting the most out of their Core experience. • What’s Happening at Chief - build excitement about events, programming, and resources that Chief has to offer outside of Core. Display the Wrap Slides and/or share event descriptions or links in the Zoom chat. You can also ask members to share what Chief events they attended last month or what they’re looking forward to attending this

		month. <i>*Some Guides prefer to “align, connect, and maximize” at the beginning of the meeting and some prefer to do this at the end. Choose which timing works best for you and each of your groups! Please note, this section only needs to be covered one time during this meeting.</i>
 (optional slide share)	2 mins	Core Journey. Begin by orienting the group to where you are in the Core journey. Briefly summarize what you discussed in M1 and orient members to what you’ll talk about today. Recommended talking points: - In M1, we talked about the mission of Core, aligned on our group norms including the 5 Cs, and learned about each other by sharing two defining moments that made us who we were today. - Today, in M2, we’ll first reflect on and share about your experience, expertise, and areas in which you want to grow. Then we’ll dive into peer advisory. Additional key points to discuss: - Core doesn’t just happen during scheduled Core meetings. Core Groups that find the most value out of their experience connect with each other between meetings (digitally, in-person, or both). - Commitment and communication is vital. Encourage members to show up for themselves as well as for others in the group and communicate with you in a timely manner if they cannot attend a meeting. Members can also self-report future absences via the Help and Support page on the Chief platform.
 (optional slide share)	3 mins	Review the 5Cs. Briefly review the 5Cs of Core to aid in setting the norms and expectations of the space. Reference any additional norms that the group aligned on in M1 and ask if they still hold true or want to amend any norms. (optional) Copy and paste in Zoom chat: 5Cs of Core: Commitment: Prioritize, show up, and be present. Confidentiality: Nothing said in Core leaves the room - ever. Candor: Be direct, honest, and non-judgmental. Context: Share your experiences and actively listen to others. Curiosity: Lead with curiosity and engage respectfully across differences.
	25 mins	Beneath the surface reflection. Next, you’ll lead the group through an individual reflection activity. In this activity, members will write their responses to the three prompts, each uncovering a more vulnerable or private layer. The goal is to guide members through the various prompts so that they can begin identifying what they bring to the group and how they want to grow, as well as



(optional slide share)

acknowledging previous instances in which they have grown. You'll use the iceberg as the analogy because, for many people, we only share our *successes* with others. When we explore further under the surface, there is often more to us that others don't often see.

Facilitation directions for iceberg exploration activity. Complete all activities below in the provided order:

1. **Set the context:** Most people only share a small portion of ourselves with others (especially at work) but there is a lot more under the surface that makes us who we are. The goal of this activity is to uncover some of those things that lay under the water, similar to an iceberg, and bring them to the group. Core is a place where you can do that safely, confidentially, and openly and this activity will help us see new parts of each other.
2. **Silent reflection:** Prompt members to take out a pen and paper or open a doc. Let them know that you will share three questions (one at a time) and they will have 2 minutes to silently journal their response to each question (6 minutes total). Share the first question and give members two minutes to respond. Repeat until members have responded to all three questions.
 - a. What are your professional superpowers?
 - b. What have you learned about yourself throughout your career journey?
 - c. In what areas do you want to grow professionally and/or personally?

(optional) Copy and paste in Zoom chat one question at a time:

What are your professional superpowers?

What have you learned about yourself throughout your career journey?

In what areas do you want to grow professionally and/or personally?

3. **Small group discussion:** Next, let members know that they will have a chance to share their responses with 1-2 other members of the Core Group. This is a chance to get to know a few other members on a deeper level. Assign members to breakout rooms (pairs or triads) and set a timer for 8-12 minutes (depending on the size of the breakout rooms). Each person will have ~4 minutes to share what they wrote about with the group. Remind members to be mindful of time and ensure each person has adequate space to share their reflections. You can send a [broadcast message through Zoom](#) at key intervals to remind members to switch speaking roles and ensure everyone has time to share. Also, make note of which members are in breakout groups together so you can change it up next time they are in small groups.

		4. Whole group debrief and share out: Bring the group back together and ask for a few members to share what they noticed or learned during their conversations. Remind members to speak from their own experience and not for other members in the group (unless permission is explicitly given). Alternatively, you can ask everyone to share a takeaway in the chat. This is a great opportunity for you to raise themes and connections between members, call back to themes you heard in M1, and take notes for future reference.
 (optional slide share)	30 mins	Intro to Peer Advisory. The goal of introducing peer advisory in M2 is to expose members to this format and model expectations of peer advisory. If your group is already familiar with peer advisory, you might choose to take a less structured approach and go straight into a peer advisory session using the Free Form structure. If your group is newer to peer advisory or needs more time to build trust and understanding, you can use the structured approach outlined below to help everyone understand the various aspects and roles of peer advisory. Facilitation directions for introduction to peer advisory: 1. Set the context: Share what peer advisory is and why we do peer advisory in Core meetings. This is your opportunity to build excitement and share a few success stories or examples of how you've seen peer advisory work in past Core groups. You might also choose to connect back to what you discussed in M1 or earlier in this meeting and/or remind everyone of the 5Cs as the norms and commitments everyone will hold during this process. 2. Generate a list: Let members know they will have 2 minutes to create a list of all of the goals that they hope to achieve in the next 6 months. Encourage members to write down as many goals as they can. Goals can be both professional and personal. After a minute, give members another 30 seconds to select one goal from their list. Encourage them to select a goal that they feel comfortable sharing with the group. 3. Expand: Next, set a 2 minute timer and prompt each member to journal about their goal. Encourage members to write about why they want to achieve this goal <u>and</u> how they would like to be supported by the group in achieving this goal (e.g., resources, accountability, perspective, advice, clarity, etc.). 4. Share out: Prompt each person to share their goal and how they want to be supported in the Zoom chat. If time allows, you can ask for a couple of members to expand on their responses verbally. 5. Deep dive: Select one member and ask them to explain the goal or situation in a bit more detail, providing context, motivation, nuance, or other important information so that the group gets a better sense of the situation. Be sure to have the member share how they want to be supported by the group (e.g., resources, accountability, perspective, advice, clarity, etc.). This should take no more than 4 minutes and you can ask prompting questions as needed to model the amount of

		context and detail expected from the person sharing. Minute paper: Set the Zoom timer for 1 minute and ask everyone, including the presenter, to write a brief reflection on what the presenter shared. You can also encourage members to reflect through other forms of engagement such as drawing pictures or diagrams, writing down key words, or thinking silently. Share out: Let everyone know that this is the second part of peer advisory: tapping into the collective wisdom. Ask for members to share what they wrote about, guiding the conversation as you go along. As the Guide, you have this opportunity to highlight behaviors or responses in line with the goal of peer advisory and also correct behaviors that veer out of the bounds of peer advisory (e.g., unsolicited advice, judgment, condescension, etc.). Repeat steps 5-7 with additional member(s) if time allows.
n/a	10 mins	Closing reflection. Close out the meeting by providing members the space to share a final reflection about their experience in M2. It's important to create a closing moment so that members can fully reflect on their experience and transition out of the Core meeting space. Prompt each person to reflect on and/or share their response to one of the following questions or a question/prompt of your choosing: Weather forecast revisited: If you had to describe how you feel <i>now</i> as a weather forecast, what would the forecast be and why? Superpowers revisited: Reflect on the professional superpower you wrote about earlier. How do you think that superpower will be a benefit to the group and what other superpowers did you notice in the group? Set an intention: What is one intention that you want to set as a result of our discussion today?
Wrap Slides (optional slide share)	10 mins	<i>(if not done at the beginning of the meeting)</i> Align, connect, and maximize* Take a moment to align on a few key aspects of the Core experience: attendance, feedback, and maximizing the Chief experience. You can use this opportunity to discuss: Core meeting schedule - Check to make sure everyone can view their upcoming Core meeting dates on their Core homepage and remind folks to add the meetings to their calendars. You can use this time to remind them of their commitment to themselves and to the group and encourage them to share as early as possible if they have a known conflict for a future Core meeting. Feedback - remind members that they will have many opportunities to share feedback with Chief, whether it's through the post-meeting feedback survey (CSAT), connecting with the Concierge team, or other surveys they will receive throughout their Chief membership. Encourage them also to share feedback with you directly as you want to make sure they're getting the most out of their Core experience. What's Happening at Chief - Build excitement about events, programming, and resources that Chief has to offer outside of Core.

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