Theme 1: The Change-Ready Leader

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End of Year Reflection
December 2025 Core Meeting Facilitation Guide

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==Q3 Theme Overview: AI-Readiness and End of Year Reflection==

To close out the year, we'll be diving into AI, a topic that is top of mind for all leaders. In addition, groups may choose to incorporate or dedicate their year-end meeting to an end-of-year reflection. Below is a high-level description of each.

1. <u>AI-Ready Leader:</u> Members will explore their readiness to lead in the age of AI by exploring the AI Maturity Pyramid.
2. <u>Digital Mindset:</u> The 30% Rule - Mastery isn't the goal; instead, a digital mindset is about understanding enough to lead with confidence and make informed decisions.
3. <u>End of Year Reflection:</u> An opportunity to pause, synthesize learning, and reflect on individual and group growth over the last year.

Please use these materials to address the current needs of each of your groups, exploring the topics that each group finds most relevant. Use all three facilitation guides or a combination of them, depending on the number of meetings your group has during Q4. See the recommendations below for guidance.

# of meetings in Q4	Suggested materials
1	- AI-Ready Leader
2	- AI-Ready Leader - Digital Mindset and/or End of Year Reflection
3	- AI-Ready Leader - Digital Mindset - End of Year Reflection

As an alternative to this facilitation guide, you can create an asynchronous reflection moment for the group via email or the Chief platform chat. Refer to the sample email copy appendix for guidance on this approach.

Meeting Focus: End-of-Year Reflection

At this month's meeting, members will reflect on their growth over the past year in Core and also celebrate the achievements of their fellow Core Group members. This is an opportunity for members to pause, reflect, and share what they have learned over the last year, how they have shown up for themselves and each other, and discuss the impact that the group has had on their personal growth.

Note: If you have recently delivered the M10 materials or have facilitated a similar reflection activity similar to the ones in this facilitation guide, consider an alternative approach to this meeting. Some suggestions are below:
- Adjust the questions and/or timing to avoid it feeling repetitive.
- Deliver or extend your conversations from the October or November AI theme facilitation guide.
- Combine one or more of the facilitation guides from Q4 into one meeting
- Create an asynchronous reflection moment for the group via email or the Chief platform chat. Refer to the sample email copy appendix for guidance on this approach.

Guiding question: When you look back over this past year, in what ways have you grown the most as a leader?

Session goals: During this Core meeting, members will:
- Reflect on their personal and professional growth over the past year
- Celebrate each other's growth by sharing observations and encouragement

Materials and resources:
- Meeting presentation deck (optional)

- Additional Resources
    - The 'inside out' leadership journey: How personal growth creates the path to success | McKinsey & Company
    - How to Do a Personal SWOT Analysis: A Reflective Year-End Exercise for Intentional Growth | The Leadership Development Lab
    - The Surprising Power of Reflection with Giada Di Stefano | The Learner Lab
    - End of Year Personal Reflection Questions | CHIEF

- Suggested Group Communications Templates
    - Pre-meeting Agenda
    - Post-meeting Summary

- Facilitation Guide context, design approach, and other guidance for Guides.

High-Level Meeting Outline

| Timing	Topic	Details
5 mins	**Welcome and Icebreaker**	Suggested Question If you could send your January 2025 self a postcard from this year, what would it say?
5 mins	**Align, Connect, and Maximize**	Discuss Wrap Slides and upcoming meeting dates
20 mins	**Set the Scene:** Personal Reflection	Personal Reflection **Personal Reflection - Choose 2-3 questions from the list below and write a brief response to each.** 1. What was your biggest "aha" moment this year? 2. What's a "small win" from the past year that had a surprisingly big ripple effect? 3. What result are you most proud of, even if it doesn't show up on a KPI dashboard? 4. What's something you achieved that you didn't think was possible at the start of the year? 5. What is one moment in Core that helped you grow as a leader?
50 mins	**Dive Deeper: (Choose one)** 1. Growth Spotlight 2. Peer Advisory 3. Group Discussion	1. Growth Spotlight **Choose one of the prompts below and complete the sentence about the person in the "spotlight":** 1. Notable growth: "One way I've seen you grow this year is…" 2. Standout moment: "A moment that really stood out to me was…" 3. Enduring strength: "A quality I consistently see in you that makes you an effective leader is…" 4. Appreciation: "One thing I appreciate or admire about you is…" 5. Looking ahead: "A way I imagine you'll build on this year's growth in the year ahead is…"

		2. Peer Advisory What is a challenge you're working through, and how can the group support you? 3. Discussion Questions (choose one or more): 1. What is one moment from this year in Core that stood out to you? Why? 2. What's one leadership trait or habit you gained or strengthened this year that you want to bring with you into next year? 3. Share an example of a time where peer advisory helped you work through a challenge. What was the challenge, how did the group support you, and where are you at now with that challenge? 4. What is one way that we've grown as a Core Group? How has this collective growth influenced the overall Core experience? 5. What is one small step you can take to build more reflection into your everyday life? What might change if you do so?
10 mins	**Closing Reflection**	(choose from the list or supply your own) - What is one thing you're thinking and one thing you're feeling after today's session? - What is one takeaway from this meeting, and how can you apply it going forward? - In one sentence, what is one thing about your Core experience this year that you are grateful for?

Detailed Facilitation & Speaker Notes

Please review the pre-meeting reminders [here](#).

Welcome and Introduction - 5 mins
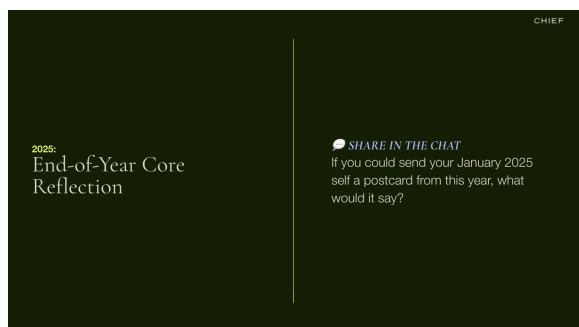
(optional slide share)

Facilitation note: *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 their response to the prompt below <u>or another welcome</u> <u>prompt of your choice in the Zoom chat or verbally</u>. If time allows, invite members to come off mute and expand on what they shared in the chat.

(optional) Copy and paste in the Zoom chat:

> If you could send your January 2025 self a postcard from this year, what would it say?

Facilitation note: *If you don't think the question above will resonate, try one of these alternatives or supply your own:*
- *What genre best describes your year: drama, comedy, thriller, documentary, sci-fi, something else?*
- *If your year were a weather pattern, what would it be? (e.g., "Mostly sunny with flash floods.")*
- *What's a "behind-the-scenes" leadership moment from this year that no one saw, but you're proud of?*

Align, Connect, and Maximize - 5 mins

Wrap Slides
(optional slide share)

Facilitation note: *Take a brief moment to review the Wrap Slides and align on upcoming meeting dates. Review [these recommendations](#) for more detailed guidance. Alternatively, you can do this at the end of the meeting.*

Set the Scene: Individual Reflection - 20 mins

Setting Context and Individual Reflection

(optional slide share)

Suggested talking points: Today, we'll take a moment to intentionally pause and reflect by acknowledging and celebrating your growth over the past year, creating a space for your peers to recognize your leadership journey and impact. Let's first start by turning inward. Take a few minutes to write down your responses to a few of the following prompts. You don't need to respond to all of them; just pick 2-3 from the list and respond to those.

(optional) Copy and paste in the Zoom chat:

Personal Reflection - Choose 2-3 questions from the list below and write a brief response to each.

1. What was your biggest "aha" moment this year?

2. What's a "small win" from the past year that had a surprisingly big ripple effect?

3. What result are you most proud of, even if it doesn't show up on a KPI dashboard?

4. What's something you achieved that you didn't think was possible at the start of the year?

5. What is one moment in Core that helped you grow as a leader?

Facilitation note: After 3-5 minutes, take a moment to debrief their reflections. Members don't have to share their responses to each question; instead, encourage them to share their big takeaways, what they noticed, or anything in particular that stood out to them in this process. For most groups, you will facilitate whole-group reflections. However, if your group has eight or more people in attendance, you might choose to debrief in two small groups instead.

<mark>Group Activity:</mark>
<mark>Growth Spotlight, Peer Advisory, and/or Group Discussion - 50 mins</mark>

Facilitation note: *For this month, you have three options to choose from:*

1. <u>*Growth Spotlight:*</u> *Each member takes turns in the spotlight, and other members share observations, reflections, and encouragements for the member in the spotlight. This is an excellent opportunity for members to hear how others perceive them, and it may surface observations they did not recognize about themselves.*

2. <u>*Peer Advisory:*</u> *For groups that love peer advisory, stick with it! Take this as an opportunity for members to either revisit a peer advisory challenge they shared earlier in the year and examine it with a fresh perspective, or work through a challenge that remains unresolved.*

3. <u>*Group Discussion:*</u> *Use the provided questions to facilitate a group discussion, or use this time to delve deeper into the questions in the "Individual Reflection" section above.*

<mark>Option 1: Growth Spotlight</mark>

(optional slide share)

Take turns inviting the group to share reflections about each other's growth and influence over the last year. Do this by inviting one member at a time to the "spotlight" (either metaphorically or literally by using the spotlight feature in Zoom) and prompting other members to share an observation (or two) about the person in the "spotlight."

Suggested talking points: Now, we're going to take some time to celebrate with each other and share wins, observations, impact, and reflections on how each of you has shown up throughout this year in Core. Sometimes, you don't realize the impact you've had on others. Likewise, we don't always have the opportunity or take the time to share our gratitude and observations. The goal of this activity is to create space for both.

This is how it's going to work: I will invite you one at a time to be in the "spotlight." Then the other members of the group will take turns sharing their reflections with you and the group. This is your opportunity to share and celebrate together.

I'll provide a few sentence starters in the chat. For each person, choose one sentence starter and think about how you'd finish the sentence for that person. Then, we'll take turns sharing your responses with each member when they are in the spotlight.

(optional) Copy and paste in the Zoom chat:

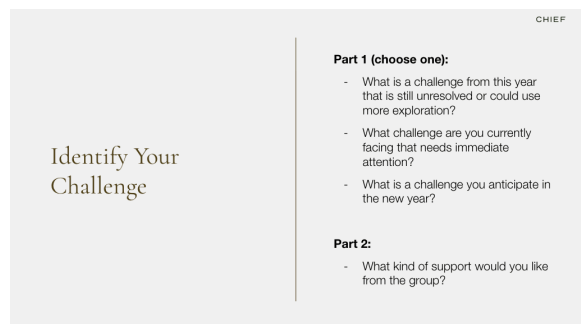**Choose one of the prompts below and complete the sentence about the person in the "spotlight":**

1. Notable growth: "One way I've seen you grow this year is…"

2. Standout moment: "A moment that really stood out to me was…"

3. Enduring strength: "A quality I consistently see in you that makes you an effective leader is…"

4. Appreciation: "One thing I appreciate or admire about you is…"

5. Looking ahead: "A way I imagine you'll build on this year's growth in the year ahead is…"

Facilitation note: *You'll want to pay close attention to the amount of time each person has in the "spotlight," ensuring each member gets roughly equal time. You'll need to do some "facilitator math" to determine how many minutes each member has in the spotlight by dividing the number of minutes left in the meeting (minus some time for a closing reflection) by the number of minutes present. For example, suppose you have 50 minutes until the end of the meeting and eight members in attendance. In that case, you'd subtract 10 minutes (setting those aside for the closing reflection) from 50, giving you 40 minutes, then divide that by the number of members present. The result is 5 minutes in the spotlight per person.*

If you have a large group in attendance, you can prompt all members to share their responses in the chat, then invite a couple of members to verbally expand on their written responses for the member in the "spotlight."

Option 2: Peer Advisory

Identifying Your Peer Advisory Challenge

(optional screenshare)

Suggested talking points: As we move into peer advisory, take a moment to think back on some of the biggest challenges that you've brought to the group this year. What remains unresolved or could benefit from further exploration? Take a moment to write down your challenge as well as how the group can support you.

If you can't think of any unresolved challenges from this year, instead think about the most pressing challenge you are facing now or one you will face going into the new year.

(optional) Copy and paste in the Zoom chat:

Identify Your Challenge

Part 1 (choose one):
- What is a challenge from this year that is still unresolved or could use more exploration?
- What challenge are you currently facing that needs immediate attention?
- What is a challenge you anticipate in the new year?

Part 2:
- What kind of support would you like from the group?

(pause for 1-2 minutes, allowing members to journal their responses)

Peer Advisory

Suggested talking points: Now, we're going to move into a few rounds of peer advisory. If there's anyone who has a timely and pressing need or who hasn't shared a challenge in recent meetings, let the group know now, and we'll start with you. Remember, there's power in the collective wisdom of the group, and there is an importance in both giving and receiving. Whether you are the one sharing your challenge or providing consultation, you can gain something from the conversation that can deepen your own professional and/or personal growth. I encourage you to keep that in the back of your mind as we move into peer advisory.

Identify Your Challenge:

Facilitate peer advisory: *Lead the group through as many rounds of peer advisory as possible, choosing one of the following* [peer advisory structures](#) *or one from your personal toolkit:*
- *Free Form with Enhancements*
- *Wise Crowd*
- *Note Takers*
- *Wicked Questions*
- *Different Angles*
- *Powerful Questions*

Each round will likely last between 10-20 minutes. As a reminder, be mindful of the group dynamic, including speaker air time, who is contributing and how often, inviting members who haven't participated in the conversation, and ensuring the group doesn't immediately jump to giving unsolicited advice (unless explicitly asked for).

<mark>Option 3: Group Discussion</mark>

Group Discussion

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1. What is one moment from this year in Core that stood out to you? Why?

2. What's one leadership trait or habit you gained or strengthened this year that you want to bring with you into next year?

3. Share an example of a time where peer advisory helped you work through a challenge. What was the challenge, how did the group support you, and where are you at now with that challenge?

4. What is one way that we've grown as a Core Group? How has that collective growth influenced the Core experience overall?

5. What is one small step you can take to build more reflection into your everyday life? What might change if you do so?

(optional screenshare)

Suggested talking points: Now that we've spent some time reflecting, I have a few discussion questions to explore in more depth. As a reminder, the power of this group lies in our ability to hear how each other approaches situations, learn from one another's experiences, and offer perspective, feedback, and clarity when relevant. I have some questions in mind, but I want to remind you that we are all co-owners of this experience, and this is meant to be a robust conversation bringing in all of your reflections, ideas, and thoughts. Please ask additional questions and bring your own experiences to the discussion–we learn from each other!

Suggested Discussion Questions (choose one or more):

1. What is one moment from this year in Core that stood out to you? Why?
2. What's one leadership trait or habit you gained or strengthened this year that you want to bring with you into next year?
3. Share an example of a time where peer advisory helped you work through a challenge. What was the challenge, how did the group support you, and where are you at now with that challenge?
4. What is one way that we've grown as a Core Group? How has this collective growth influenced the overall Core experience?
5. What is one small step you can take to build more reflection into your everyday life? What might change if you do so?

<mark>Wrapping up.</mark>
Facilitation note: *As the discussion comes to a close, wrap up the conversation by highlighting some of the high points that you noticed throughout the discussion (e.g., Did someone talk that you don't typically hear from? Was there a theme that emerged during the conversation? Did you notice a shift in the meeting that you want to highlight?). Also, remind members that Core is a 24/7 experience and that the discussion doesn't have to end at this moment. Encourage members to stay connected via the group chat and share how they are using takeaways from today's discussion throughout the weeks between now and the next Core meeting.*

<mark>Closing reflection</mark> *- 10 mins*

Facilitation note: *Close out the meeting by providing members with the space to share their final reflections and takeaways from the meeting, and meaningfully transition out of the Core space.*

Prompt each member to share their response to one of the following questions or a different closing reflection question of your choosing:

- What is one thing you're thinking and one thing you're feeling after today's session?
- What is one takeaway from this meeting, and how can you apply it going forward?
- In one sentence, what is one thing about your Core experience this year that you are grateful for?

Facilitation note: *Lastly, highlight any further reading, thought leadership, or resources that members can use to dive deeper into the theme. Some suggested resources are listed below. You are encouraged to add to the list, pulling from your own toolkit and/or by sharing any resources that members mentioned during today's meeting.*

(optional) Copy and paste in the Zoom chat:

Resources:
- [The 'inside out' leadership journey: How personal growth creates the path to success](#) | McKinsey & Company
- [How to Do a Personal SWOT Analysis: A Reflective Year-End Exercise for Intentional Growth](#) | The Leadership Development Lab
- [The Surprising Power of Reflection with Giada Di Stefano](#) | The Learner Lab
- [End of Year Personal Reflection Questions](#) | CHIEF

Facilitation note: *Have a go-to article, framework, or resource related to the theme? Add it to the list! Don't think one of these resources will land with the group? Don't include it! Did a member mention a resource during the meeting about this topic? Ask them to share the link! Did you see an upcoming event on the Chief platform relevant to this topic? Share it!*

Appendix

Facilitator Guidance

Context: To increase the connection between the Core experience and the larger Chief experience, we're launching monthly content themes designed to provide additional structure and direction for timely Core meeting discussions and peer advisory. These content themes are in response to recent member feedback asking for more leadership development takeaways in Core:

- "It's hard to gauge if I'm getting value from my Core Group when the topics feel disconnected from my work."
- "The coaching/Core sessions are the same. Attrition is happening because the value is not there. You must elevate, elevate, elevate the programming."
- "Have [a] methodology to guide conversations. Feels more like a 'what's on your mind' approach and unguided."

Purpose: This facilitation guide is designed to orient you to the June Core theme and provide guidance around facilitating upcoming Core meeting(s), with peer advisory still being the primary focus of each meeting. The intention is *not* to create a rigid structure, but instead to offer a point of view and a way to discuss a topic that is broadly relevant to Chief members. The use of these materials is encouraged but not required.

Design approach: This facilitation guide is designed to provide light structure while also allowing you, the Guide, ample flexibility and choice. If you'd like to ask a different icebreaker question, go for it! If a member has a really pressing need to discuss with the group that's unrelated to the theme, carve out some time to talk about it! If a member is in transition between roles, encourage them to think about the topics in the context of previous or future roles. The goal is to provide a point of view and facilitation guidance while also ensuring that you can meet the needs of each group and deliver the highest level of member experience through Core.

Exceptions to using this facilitation guide: There are some instances where you will choose to lead a tentpole meeting instead of using the monthly theme, including: Meeting 1, Meeting 2, Meeting 3, and every 10th meeting (Meeting 10, 20, 30, etc.). There are also times when you might supplement the theme with hyper-relevant discussions based on the group's needs, such as facilitating a Core Candor conversation or discussion related to a topic requested by the group. Lastly, in the case that new members are joining an existing Core Group, we recommend using the abridged M1-3 materials or the New Member Introductions resource, both of which you can find on the additional materials page.

Balancing personal and professional: We encourage you and the group to focus your discussion primarily on professional challenges, *and* we also know that professional and personal are interdependent. Our general recommendation is to meet the needs of members at the moment and bring the conversation back to professional growth as the foundation of the Core experience. Of course, we know that professional affects personal and personal affects professional, so use your judgement to balance the needs of members and the group with the recommendations in this facilitation guide. We trust you.

Suggested Group Communications

Use the copy below to send the pre-meeting agenda and post-meeting summary via the Guide portal on Chief.com. Please adjust the tone and details to reflect your voice, the group dynamic, and to address any relevant and timely needs of members and the group.

Pre-meeting agenda:

Hi G{#}! I'm looking forward to seeing you all at our next Core meeting on [date and time] at [insert Zoom meeting link or meeting location], where we'll be reflecting and celebrating all of the ways you have grown this year. You'll have a chance to share both your personal reflections and observations about each other's growth. We'll be diving into this conversation and more! See you there!

Post-meeting summary:

Hi G{#}! Thank you so much for [*insert detail from the meeting, such as how the members showed up to support one another, their vulnerability in sharing their challenges, the commitment they showed to the group and one another, etc.*].

We discussed [*insert very high-level summary of the points of discussion. Be sure not to include overly specific member details*, and as a result, we [*insert a takeaway, next step, or intention stemming from the meeting*].

As I shared at the end of the meeting, I'm sharing a few resources related to our discussion:
- [*share the provided links and/or add your own!*]

What else are you reading, watching, or learning? Share it in the group chat!

(Optional) Asynchronous End of Year Reflection

Hi G{#}! As we are nearing the end of 2025, I want to celebrate all of the ways that you have grown, both personally and professionally, and how our group has shown up for each other in many ways.

[Share a few observations about how the group has grown, challenged themselves, or supported one another over the course of this year. End with excitement and encouragement for the upcoming year].

I also invite you to share your own reflections, wins, and words of gratitude with the group! Let's take a moment to celebrate your growth and reflections on the year with each other by replying to this thread and sharing your response to **one or more** of these questions:
1. What is one moment from this year in Core that stood out to you? Why?
2. Share an example of a time where peer advisory helped you work through a challenge. What was the challenge, how did the group support you, and where are you at now with that challenge?
3. What's something you achieved that you didn't think was possible at the start of the year?
4. What's a "small win" from the past year that had a surprisingly big ripple effect?

I'm looking forward to hearing your responses!

With gratitude,
[Guide name]

Pre-meeting reminders for Guides:

- **Log onto Zoom ~10 min before 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, you must 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.

<mark>Wrap Slides Review Guidance:</mark>

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** - review the upcoming 2-3 meeting dates and times and remind members to hold that time on 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.