Theme 1: The Change-Ready Leader

Embrace the Shift: Navigating Change with Resilience
April 2025 Core Meeting Facilitation Guide

Context: In order 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 April Core theme and provide guidance around facilitating upcoming Core meeting(s) with peer advisory still being the main focus of each meeting. The intention is *not* to create a rigid structure, but rather to offer a point of view and way to discuss a topic that is broadly relevant to Chief members. The use of these materials are 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 specifically requested by the group. Lastly, if 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 can be found 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.

Meeting Focus

Chief recently asked members of the Chief community about the biggest challenges and opportunities they're navigating this year as a part of our annual The New Era of Leadership awards. 61% of Chief Members surveyed say adaptability to change is most critical for success as an executive this year.

> **Guiding question:** What is an area of change that you will face in the coming year that will require great adaptability and how prepared are you to face that change?

Session goals: During this Core meeting, members will:
- Look ahead and identify an area of great change that they anticipate they will face in their professional careers
- Reflect on their readiness for change, their ability and readiness to adapt, and what's getting in their way
- Discuss specific challenges they'll face and share how they can tackle those challenges, including strategies, guidance, and ideas for embracing change and being adaptable

Materials and resources:
- Meeting presentation deck (optional)
- Resources for further reading:
    - What Differentiates a Great Team From a Good One During Times of Crisis
    - The Cost-Risk Analysis All Leaders Should Weigh When Making a Hard Decision
    - How Leaders Get in the Way of Organizational Change
    - Approach to Change Questionnaire (Note: This questionnaire includes a list of powerful self-reflection prompts about adaptability and change. You might choose to supplement your discussion with select questions from this list or use it to

encourage continued discussion or reflection between meetings.)

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] where we will be discussing the topic of change, including how you approach change, what changes are coming up for you in work and life, and ways you approach change with adaptability as your focus. To get you thinking about this topic, I encourage you to reflect on an area of change that you will face in the coming year and how prepared you are to face it. 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 take-away, next step, or intention stemming from the meeting*].

As I shared at the end of the meeting, I'm sharing a few resources that you might find useful in navigating the topic of change:
- [*share the provided links and/or add your own!*]

What else are you reading or consuming related to change and adaptability? Share it in the group chat!
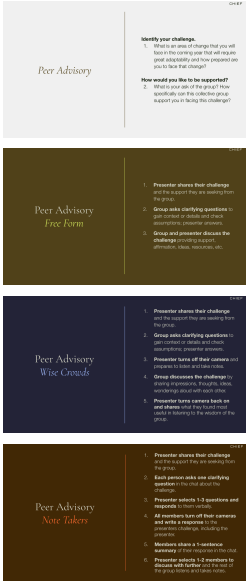

High-level meeting outline:

Suggested Timing	Topic
5 mins	Welcome and Icebreaker
5-10 mins	Align, Connect, and Maximize
15 mins	Set the Scene: Your Approach to Change
50-55 mins	Dive Deeper: Peer Advisory or Group Discussion
10 mins	Closing Reflection

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.

(optional slide share)	5 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: "What's something you were hesitant to try (e.g., restaurant, book, activity, professional opportunity, etc.) but did anyway? Were you glad you tried it or not? Why?" <u>or another welcome prompt of your choosing</u>. **(optional) Copy and paste in the Zoom chat:** What's something you were hesitant to try (e.g., restaurant, book, activity, professional opportunity, etc.) but did anyway? Were you glad you tried it or not? 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 and what they learned from the experience.

Wrap Slides
(optional slide share)
	5-10 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** - 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. *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.*
(optional slide share)	15 mins	<mark>**Set the scene: Your approach to change.**</mark> Chief recently asked members of the Chief community about the biggest challenges and opportunities they're navigating this year. 61% of members surveyed said that adaptability to change is most critical for success as an executive this year. Through this activity, you'll discuss members' approach to change, their readiness to embrace change, what might be getting in their way of achieving necessary changes, and strategies for approaching upcoming changes. <mark>**Individual reflection.**</mark> Display the following quotes via screenshare using the provided slide or copy and paste the quotes into the chat. Set a timer for 1 minute and ask members to choose the quote that most resonates with them and write a minute paper explaining why they chose the quote and what stands out most to them. **(optional) Copy and paste in the Zoom chat:** "Embrace what you don't know, especially in the beginning, because what you don't know can become your greatest asset." — Sara Blakely, Founder of Spanx "Don't fear change. You may lose something good, but you may also gain something great." — Soledad O'Brien, Journalist & CEO of Starfish Media "I always change. I don't think I've ever felt comfortable with the idea of being static in any way." — Janelle Monáe, Musician & Actor "If you focus on the obstacles, then you give them more power. Instead, focus on your dreams, your goals, and you will find ways to get past the obstacles." — María Elena Salinas, Journalist "I can't change the direction of the wind, but I can adjust my

		sails to always reach my destination." — Dolly Parton, Singer-Songwriter & Businesswoman *facilitation note - Have a favorite quote about embracing change or being adaptable? Add it to the list or swap it out for one of the quotes above. Does a member have a favorite quote about change and/or adaptability? They can share it with the group and use it as inspiration for their minute paper.* **Group share out.** After the minute is up, prompt members to share which quote they chose and why. Give each member ~1-2 minutes to share. You can choose to facilitate this discussion in a large group, small groups, or pairs. If you choose to use small groups or pairs, ensure you reserve a small amount of time for the whole group debrief after the small group discussions end.
Peer Advisory *Peer Advisory* **Identify your challenge.** 1. What is an area of change that you will face in this coming year that will require great adaptability and how prepared are you to face that change? **How would you like to be supported?** 2. What is your ask of the group? How specifically can this collective group support you in facing this challenge? *Peer Advisory Free Form* 1. Presenter shares their challenge and the support they are seeking from the group. 2. Group asks clarifying questions to gain context or details and check assumptions; presenter answers. 3. Group and presenter discuss the challenge providing support, affirmation, ideas, resources, etc. *Peer Advisory Wise Crowds* 1. Presenter shares their challenge and the support they are seeking from the group. 2. Group asks clarifying questions to gain context or details and check assumptions; presenter answers. 3. Presenter turns off their camera and prepares to listen and take notes. 4. Group discusses the challenge by sharing impressions, thoughts, ideas, wonderings aloud with each other. 5. Presenter turns camera back on and shares what they found most useful in listening to the wisdom of the group. *Peer Advisory Note Takers* 1. Presenter shares their challenge and the support they are seeking from the group. 2. Each person asks one clarifying question in the chat about the challenge. 3. Presenter selects 1-3 questions and responds to them verbally. 4. All members turn off their cameras and write a response to the presenter's challenge, including the answers. 5. Members share a 1-sentence summary of their response in the chat. 6. Presenter selects 1-2 members to discuss with further and the rest of the group listens and takes notes. (optional slide share) Group Discussion *Group Discussion* 1. **Personal Adaptability:** Share a time when your adaptability as a leader was tested. How did you navigate the challenge, and what lessons did you take away? How did that experience influence the leader you are today? Would you handle the situation the same or differently today? Why? 2. **Organizational Change:** With 91% of executives clarifying adaptability as critical, what strategies have you seen work best for fostering a culture of adaptability within your teams or organizations? 3. **Skill Development:** What specific skills or mindsets do you believe are essential for increasing adaptability as an executive leader, and how can you actively develop them? 4. **Balancing Stability & Change:** How do you balance the need for adaptability with maintaining stability and consistency for your teams and stakeholders? 5. **Future Readiness:** Looking ahead, what are the biggest changes you anticipate in your industry, and how are you preparing yourself and your organization to adapt successfully? (optional slide share)	50-55 mins	**Dive deeper: Peer Advisory or Group Discussion.** *While we strongly recommend you lead the group through peer advisory, as that is the foundation of the Core experience, we do recognize that, at times, the moment calls for something different. In this section, you have two options: peer advisory or group discussion. Choose the one that best fits the group and the moment, flexing as needed between the two.* --- **Option 1: Peer Advisory (recommended)** In the next part of the meeting, you'll facilitate peer advisory with a focus on upcoming changes that members will face and how they can use the collective wisdom of the group to gain more clarity, confidence, understanding, perspective, and/or tactics to help them embrace the upcoming change. You'll have the choice of which peer advisory facilitation structure to use (Free Form, Wise Crowds, Note Takers, or your own structure) based on the group's preferences and members' needs at that moment. **Note: The goal of Core is that members bring their challenges to the group for timely and necessary peer support. So, if a member brings a challenge to the group that's not exactly about "embracing change," that's okay! As the Guide, we trust your judgement and flexibility to meet the group and each member where they are at. Support that member in the moment and eventually guide the conversation back to the*

theme.

Individual Reflection: Identifying your challenge.
Suggested talking points: As I shared earlier, Chief recently asked members of the Chief community about the biggest challenges and opportunities they're navigating this year. 61% of members surveyed say adaptability to change is most critical for success as an executive this year. We just learned more about each person's perspective and approach to change and next we're going to move into peer advisory to tackle specific challenges together as a group. For peer advisory today, I invite you to reflect on the following question: *What is an area of change that you will face in the coming year that will require great adaptability and how prepared are you to face that change?* I'll put 2 minutes on the timer and I invite you to write your reflections on a piece of paper or a document on your computer.

(optional) Copy and paste in the Zoom chat:

Reflect for two minutes: What is an area of change that you will face in the coming year that will require great adaptability and how prepared are you to face that change?

Now that you've identified your challenge and how prepared you feel, take a moment to reflect on how the group could support you through this change. Do you need a specific perspective shift? Would it be helpful to brainstorm new ideas? Are you looking for a resource or connection? Do you want to hear how others have tackled a similar challenge and what they learned from it? I'll add 1 more minute to the timer. Use this time to think about your ask from the group. How can this collective group specifically support you in facing this challenge?

(optional) Copy and paste in the Zoom chat:

Reflect for one minute: What is your ask of the group? How specifically can this collective group support you in facing this challenge?

Invitation to share your challenge.
Suggested talking points: Now that you've had a moment to reflect on your upcoming change, your personal readiness to adapt to it, and how the group can support you through it,

let's open up the conversation to the group: Type a brief summary of your challenge in the chat (10 words or less) but send your message just yet. I'll tell you when to hit send!

Pause to allow members to type in the chat. Once everyone has typed their response, prompt members to hit send. Review what was shared in the chat and identify any themes (if possible), what stands out to you from reading the members' shares, or ask any brief clarifying questions so you have a sense of each member's challenge. Alternatively, you could prompt each member to briefly (1-2 minutes) share out loud with the group.

Launching peer advisory.
Suggested talking points: Now, we're going to move into a few rounds of peer advisory. If there's anyone that has a really timely and pressing need or that hasn't shared a challenge in recent meetings, let the group know now and we'll start with you. Otherwise, I'll choose from the list in the chat and we'll cycle through as many challenges as we can during this time. Also, 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.

Peer Advisory: Lead the group through as many rounds of peer advisory as possible, choosing one of the following peer advisory structures:
- [Free Form with Enhancements](#)
- [Wise Crowd](#)
- [Note Takers](#)
- Other peer advisory structure from your personal toolkit

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

Wrapping up: As peer advisory comes to a close, wrap up

the conversation by highlighting some of the high points that you noticed throughout peer advisory (e.g., Did someone talk that you don't normally hear from? Was there a theme that emerged during 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 this group is available to support outside of the Core meeting. You might even highlight the challenges of members that didn't get to share and spend a moment creating a plan for how members will connect to support them between now and the next meeting. Take note of who didn't get to share and try to give them priority in upcoming meetings.

Option 2: Group Discussion
For groups that might want a bit more of a structured discussion (or moments in time that might call for it), you can use the following questions to facilitate reflection and discussion related to adaptability and change. Choose from the questions on the list below or provide your own questions related to the theme.

Suggested talking points: Now that we've spent some time thinking about change broadly and reflecting on our ideas about change, we're going to dive a little deeper into a more tactical discussion. I have a few discussion questions to get the conversation started. As a reminder, the power of this group is that we can hear how each other approaches situations and learn from their experience 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. **Personal Adaptability:** Share a time when your adaptability as a leader was tested. How did you navigate the challenge, and what lessons did you take away? How did that experience influence the leader you are today? Would you handle the situation the same or differently today? Why?
2. **Organizational Change:** With 61% of executives

		identifying adaptability as critical, what strategies have you seen work best for fostering a culture of adaptability within your teams or organizations? 3. **Skill Development:** What specific skills or mindsets do you believe are essential for increasing adaptability as an executive leader, and how are you actively developing them? 4. **Balancing Stability & Change:** How do you balance the need for adaptability with maintaining stability and consistency for your teams and stakeholders? 5. **Future Readiness:** Looking ahead, what are the biggest changes you anticipate in your industry or function, and how are you preparing yourself and your organization to adapt successfully? **Wrapping up:** As the group 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 normally hear from? Was there a theme that emerged during 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.
n/a	10 mins	<mark>**Closing reflection.**</mark> Close out the meeting by providing members the space to share final reflections and takeaways from the meeting. 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:** • **Fill in the gap:** I came into today's meeting feeling ___ and now I'm feeling ___. • **Short response:** What is one insight or intention you have as a result of today's meeting? • **Short response:** What is one tactical next step you commit to taking before our next meeting? Lastly, highlight any further reading, thought leadership, or resources that members can use to dive deeper into the topic of change and adaptability. 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 were mentioned by members during today's meeting. **(optional) Copy and paste in the Zoom chat:** **Resources:** - What Differentiates a Great Team From a Good One During Times of Crisis - https://chief.com/articles/what-differentiates-a-great-team-from-a-good-one-during-times-of-crisis - The Cost-Risk Analysis All Leaders Should Weigh When Making a Hard Decision - https://chief.com/articles/the-cost-risk-analysis-all-leaders-should-weigh-when-making-a-hard-decision - How Leaders Get in the Way of Organizational Change - https://hbr.org/2021/04/how-leaders-get-in-the-way-of-organizational-change - Approach to Change Questionnaire - https://docs.google.com/document/d/1Er6V2ajS-gmWo5N7nQv2O6kJW6vbnVp7sl_Dl7tL15U/edit?tab=t.0 *facilitation note - Have a go-to article, framework or resource about navigating change? 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 they like related to this topic? Ask them to share the link! Did you see an upcoming event on the Chief platform relevant to this topic? Share it!*