Theme 1: The Change-Ready Leader

Strengthening the Customer Cycle through Practical Adjustments and Trust

Builder | Pillar 1: Attracting, Securing, and Keeping Customers

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Meeting Focus

A thriving business begins with clarity about whom it serves, the problems it addresses, and the distinct value it offers. This session supports Builders in examining their current customer experience through the TPSV lens—target market, pain points, service, and value—to understand what drives customer decisions today and where opportunities exist to reshape that experience in more meaningful ways. Participants consider how these choices influence trust, a key element in building durable client relationships and sustaining engagement.

In this session, Builders identify who consistently converts, which pain points matter most, where their service supports or slows decision-making, and how customers interpret the value they deliver. They uncover gaps, clarify differentiators, and translate insights into focused actions that strengthen their ability to attract, secure, and retain clients.

As a Guide, your role is to create a space that blends strategic thinking with meaningful connection. Encourage participants to shift from a service-delivery mindset to one that recognizes their work as a channel through which insight and transformation flow.

One activity in this session is based on the 4 Actions Frameworks drawn from the book *Blue Ocean Strategy* by W. Chan Kim and Renée Mauborgne. Please ensure you are familiar with the 4 Actions Framework and the terms target market, pain points, serve, value (TPSV), and the customer cycle (awareness, engagement, conversion, and retention).

In this session, members will explore the guiding question: How can understanding your target market, customer pain points, service, and value reshape the customer experience and strengthen value and trust across their journey?

Meeting objectives: During this Core meeting, members will:

- Have a clear understanding of what influences your customers' decisions today and, using the lens of target market, pain points, service, and value (TPSV), identify where the opportunity lies to reshape that experience.
- Map how TPSV relates to the customer cycle and use their insights to identify a change they can make that will lead to greater customer value and trust using the 4 Actions Framework.

Materials and resources:
Meeting presentation deck (optional)

Resources

- Blue Ocean Strategy | W. Chan Kim and Renée Mauborgne
- 4 Actions Framework | Blue Ocean Strategy
- Market Opportunity Navigator | Case studies, worksheets, articles, and more!
- The Neuroscience of Trust | Harvard Business Review

High-Level Meeting Outline

Timing	Topic	Details
30 mins	**Welcome and Intro to Core**	**Opening Warm-up** - 5 mins What's one thing you're looking forward to in Core? **Guide Introduction** - 2 mins - Name and pronouns - Location - Brief (~30 seconds) professional history - Your background with facilitation/coaching - Why you're excited to work with this group **(Optional) Copy and paste in the Zoom chat:** Core empowers builders with the confidence, resources, and community to create and scale value-aligned, thriving businesses. **Leadership Pillars** - Attracting, Securing, and Keeping Customers - Scaling Systems to 10x Your Impact - Cultivating Your Support Ecosystem - Fortifying Your Financial Armor - Building and Being the Brand

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- Rising Through Resilience

Group Norms and 5Cs - 3 mins

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.

Member Introductions - 15 mins
If more than 10 members, complete in small groups

Introduction:
- Name, pronouns (optional)
- Location
- Company name and 1 sentence describing what service you provide
- 1 sentence: What lights you up about building your business right now?
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<td>50 mins</td>
<td>Dive Deeper: Attracting, securing, and keeping customers</td>
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Transition and Framing - 5 mins

When you reflect on recent client relationships, what actions have strengthened trust the fastest?

TPSV - 20 mins
Individual Assessment

1. Target Market - Who are they?
2. Pain Point - What problem are they trying to solve?
3. Service - How do you help them solve it?
4. Value - What change or result do they experience because of your work?

Reflect - Looking at your TPSV, which area does the most to build trust with your customers today, and which area would benefit from deeper focus to strengthen that trust?

Small or large group discussion - 13-15 mins
Choose from the questions below or supply your own:
- What did you notice when you put your target market, pain point, service, and value side by side? Did anything feel clearer or more connected than before?
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		- Where do you see the strongest alignment between what your clients need and what you deliver? What helped you see that? - Which element of TPSV felt harder to articulate? What might be causing that? **Strengthening Your Customer Cycle with TPSV and Four Actions** - 25 mins Step 1: Review TPSV - 3 mins Step 1: - Awareness - Which element of TPSV naturally draws people toward me or my business? - Engagement - Which element of TPSV helps someone stay engaged? - Conversion - Which element of TPSV supports a buying decision? - Retention - Which element of TPSV tells clients to stay or return? Step 2: Map TPSV to the Customer Cycle - 4 mins Step 2: - Awareness - Does your target market immediately recognize you as relevant to their situation? - Engagement - Is the pain point articulated clearly enough to spark interest and conversation? - Conversion - Does your service description help people understand why and how to work with you? - Retention - Is the value you promise aligned with what keeps clients loyal or makes them refer others? Step 3: Apply the 4 Actions Framework - 5 mins Step 3: 1. Eliminate - What steps, habits, or messages weaken any part of the cycle or distract from your core value? 2. Reduce - Where are you creating unnecessary friction, especially during engagement or conversion? 3. Raise - What should be strengthened to make you more visible, more trusted, or more compelling? 4. Create - What new asset, message, or experience would improve movement from awareness to retention? Peer Exchange - 13 mins (Optional - if time allows) Whole Group Insight Harves

10 mins	**Wrap Slides + Closing Reflection**	**[Wrap Slides]** **Closing reflection (choose one)** - What one action will you take for yourself or your business as a result of today's session? - What do you want to explore further as a result of our conversation today? - What are 1-2 words that describe how you're feeling as a result of the conversation today? - What phrase or image stood out from our conversation today? **Resources** - Blue Ocean Strategy | W. Chan Kim and Renée Mauborgne - 4 Actions Framework | Blue Ocean Strategy - Market Opportunity Navigator | Case studies, worksheets, articles, and more! - The Neuroscience of Trust | Harvard Business Review

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Detailed Facilitation & Speaker Notes

Welcome and Intro to Core - 30 mins

Use the first 30 minutes to ground members in Core's purpose and norms and to spark connections among members. With limited time, pacing matters. Be sure to introduce the Core Journey, yourself, your role as a Guide, the 5Cs, and the members within this segment.

Opening Warm Up - 5 mins

Welcome members by name as they join to create a warm and inviting space. Prompt them to answer the welcome question in the chat and, if time allows, invite members to come off mute and expand their responses.

(optional) Copy and paste in the Zoom chat:

What's one thing you're looking forward to in Core?

Alternative welcome questions:
- What's the best Chief event, program, or offering you've participated in? What did you like about it?
- What's energizing you lately?
- What's a secret talent that you have?

Guide Role and Introduction - 2 mins
Briefly introduce yourself and your role as a Guide.

Recommendations for your intro:
- Name, pronouns (optional)
- Location
- Brief (30 seconds or less) professional history
- Your background with facilitation/coaching
- Why you're excited to work with this group

Core Journey Overview - 5 mins
Orient members to the Builder Core Journey and leadership pillars.

> ***Suggested talking points:*** *In Core, we approach every conversation with curiosity, share perspectives with depth, and hold one another accountable with care. This group is your trusted community, a circle of peers who understand the realities of leadership and offer genuine support through its challenges.*
>
> *The mission of the Builder Core Journey captures this spirit: Core empowers builders with the confidence, resources, and community to create and scale value-aligned, thriving businesses.*
>
> *Over the next year, we'll meet roughly every two months to explore topics that matter most to you as Builders. Each session will connect to one or more of the leadership pillars. Today's focus is the first pillar: attracting, securing, and keeping customers.*

(Optional) Copy and paste in the Zoom chat:

Core empowers builders with the confidence, resources, and community to create and scale value-aligned, thriving businesses.

Leadership Pillars
- Attracting, Securing, and Keeping Customers
- Scaling Systems to 10x Your Impact
- Cultivating Your Support Ecosystem
- Fortifying Your Financial Armor
- Building and Being the Brand
- Rising Through Resilience

Core Group Norms: The 5 Cs - 3 mins
Review the 5Cs to define how the group will work together. Share your perspective or examples of how other groups have thrived by honoring these principles. This moment helps establish trust and collective ownership.

Suggested talking points: *The 5Cs of Core—commitment, confidentiality, candor, context, and curiosity—are the norms we all agree to in the Core experience. These are the foundational commitments we all uphold to create a safe, authentic, and confidential space. In addition, here are a few tips for getting the most out of your Core experience:*

- *Core doesn't just happen during scheduled Core meetings. Core members who find the most value in their experience connect between meetings (digitally, in person, or both). Think of Core as a 24/7 community.*
- *Commitment and communication are vital. It's essential that you show up for both yourself and each other. Let me and the group know in a timely manner if you cannot attend a meeting.*

(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.

Member Introductions - 15 mins

Use this time to facilitate brief member introductions. If your group has more than 10 members, move them into breakout rooms of 3-4 to introduce themselves further after everyone has shared their initial introductions in the chat.

Suggested talking points: *Let's take a few minutes to get to know one another and the experience each of us brings to the group. We'll keep introductions brief so we can dive into today's topic. Please start by typing the following information in the Zoom chat. Don't worry, you'll have a chance to expand on your defining moment later. For now, keep it short, like a headline.*

(optional) Copy and paste in Zoom chat:

Introduction:

- Name, pronouns (optional)
- Location
- Company name and 1 sentence describing what service you provide
- 1 sentence: What lights you up about building your business right now?

Pause for 1 minute while members share their responses in the chat; then call on members in the order that you see them to share their introductions, focusing on the service they provide and what lights them up about building their business. If your group has 10 or more members, move them into breakout rooms so each person has more time to share.

Note on Timing: Let members know they'll have additional chances to connect later. Ask that introductions stay within 1–1.5 minutes each so everyone can share in about 15 minutes. Short introductions preserve time for deeper conversations ahead. Provide a gentle cue, such as raising your hand, when there are about 15 seconds left.

Transition and Framing - 5 mins

Transition to a brief introduction of this meeting's leadership pillar (Attracting, Securing, and Keeping Customers) to set context and invite reflection. If timing is tight or you think the group is ready, skip this section and move straight to the following section, "TPSV."

Authentic Connection and Aligned Value

Create a warm welcome and set the tone for authentic connection and aligned value.

> ***Suggested talking points:*** *Now we're going to move into an interactive discussion and working session where you'll examine how to build trust with your customers by exploring your target market, pain points, service, and value influence various parts of the customer cycle. Then, we will move into an exercise where you will ideate ways to stand out among your competitors and exchange ideas and feedback with your peers.*

(Optional) Icebreaker Question

If time allows or you feel an icebreaker question would add to the discussion, prompt members to share their responses to the provided question. You might also skip this question and move straight into the next section.

> ***Suggested talking points:*** *In the chat, I'd like you to share: When you reflect on recent client relationships, what actions have strengthened trust the fastest?*

(optional) Copy and paste in Zoom chat:

When you reflect on recent client relationships, what actions have strengthened trust the fastest?

Ask for a few members to share with the whole group or move members into breakout rooms (pairs or triads) to discuss their responses. Some example responses include:

- A **short welcome call** during onboarding has been huge. It shows I'm invested before we dive into the real work.
- Minor **service-design tweaks**, like simplifying how clients submit information, reduced friction and boosted confidence.
- **Offboarding rituals** have generated more referrals than I expected. A final recap of wins reminds clients of the value they received.

- A **structured debrief** at the end of a project has sparked future work. Clients enjoy reflecting on progress while the experience is still fresh.

TPSV - 20 mins

This section helps participants build a grounded, honest snapshot of how customers currently experience their business across four key areas: Target market, pain points, service, and value. This exercise helps to clarify who they serve and how trust takes root.

Individual Assessment - 5-7 mins

Guide members through a series of self-reflection questions focused on the target market, pain points, service, and value. Wrap up this section by facilitating an experience-mapping activity in which members draw insights from their TPSV.

> ***Suggested talking points:*** *When customers choose where to spend their time and money, they look for clear signals of relevance. They pay attention to how well you address their needs, the quality of your service, the value they expect to receive, and whether you've shown the reliability that builds trust.*
>
> *Approaching your work this way reinforces trust because it reflects intentional choices that put customer needs at the center rather than reacting to what others are doing.*
>
> *We'll start by examining what currently shapes your customers' decisions and where fresh opportunities may exist. To begin, you'll complete a brief self-assessment. No need for long answers—just jot down your thoughts.*

Copy and paste in Zoom and/or display the corresponding slide:

1. Target Market - Who are they?
2. Pain Point - What problem are they trying to solve?
3. Service - How do you help them solve it?
4. Value - What change or result do they experience because of your work?

Reflect - Looking at your TPSV, which area does the most to build trust with your customers today, and which area would benefit from deeper focus to strengthen that trust?

Facilitation notes: The activity helps members clarify the core elements of their offering and see how those elements work together. By putting their target market, pain point, service, and value side by side, they gain a clearer view of what drives their customer decisions and where their positioning feels strongest.

When facilitating this section, model a sample response from your own experience or use one of the provided responses below:

Fractional CFO in Health Tech

1. Target Market - Growth-stage health tech companies navigating complex financial operations.
2. Pain Point - They struggle to forecast accurately and manage cash with confidence during rapid scaling.
3. Service - I build forecasting models, streamline reporting, and guide financial decisions.
4. Value - They gain clarity, operational stability, and a stronger foundation for investment conversations.

Reflection - The pain point is the area that builds the most trust today because clients see immediately that I understand their financial pressures. I want to focus more on articulating long-term value, since showing what improves over time would further strengthen trust.

Founder of an Experiential Design Agency

1. Target Market - Brands that want to create immersive events or interactive experiences to deepen audience engagement.
2. Pain Point - They struggle to translate their message into moments that feel memorable and emotionally resonant.
3. Service - I design and produce experiences that combine storytelling, spatial design, and technology.
4. Value - They gain events that capture attention, strengthen connection, and elevate how audiences perceive the brand.

Reflection - My service builds the most trust because clients can see the rigor and creativity behind how I bring ideas to life. I want to focus more on clarifying the transformation they experience, since a stronger value narrative would reinforce trust earlier in the relationship.

Small or Large Group Discussion - 13-15 mins

Debrief member responses either in small groups or as a whole group. Use the questions below or supply your own:

- What did you notice when you put your target market, pain point, service, and value side by side? Did anything feel clearer or more connected than before?
- Where do you see the strongest alignment between what your clients need and what you deliver? What helped you see that?
- Which element of TPSV felt harder to articulate? What might be causing that?

Facilitation note: There are different benefits to debriefing in small groups or as a whole group. Use the guidance below to determine the best tactic for each group.

- <u>Small group discussion:</u> This creates an opportunity for members to learn more about each other's businesses and the unique value they bring to their offerings. Members can go a little deeper with a few other members and gain more feedback, clarity, and insights on their responses.
- <u>Large group discussion:</u> With this method, members likely won't discuss many specifics of their businesses; instead, they will draw on and share insights into the process of thinking through TPSV, and

you can guide the discussion to the depth or breadth the group needs.

Key takeaway: A clear picture of the target market, the specific problem you address, the service you provide, and the value you create establishes a foundation for trust by showing customers that you understand them and operate with clarity. Together, these elements show customers that you operate with focus, insight, and accountability. This creates conditions in which trust forms naturally.

Strengthening Your Customer Cycle with TPSV and Four Actions - 25 mins

Members will refine their Target market, pain point, service, and value by examining how well each element supports the customer cycle. They then use the 4 Actions Framework to identify opportunities for improvement and receive peer feedback to help them select a high-impact next step.

Step 1: Review TPSV - 3 mins

Reflect on the elements of TPSV through the lens of the customer cycle.

> ***Suggested talking points:*** *For this next section, I'm going to lead you through a fast-paced multi-part reflection activity. At the end of this activity, you will identify one area in your business that you can improve, receive peer feedback on your idea, and identify one high-impact next step you can take going forward.*
>
> *To get us started, let's take a deeper look at your TPSV in relation to the customer cycle. Take a moment to read over your TPSV responses, then reflect on these questions focused on the four areas of the customer cycle: awareness, engagement, conversion, and retention. Just jot down quick notes—no need for perfection!*

Copy and paste in Zoom and/or display the corresponding slide:

Step 1:

- Awareness - Which element of TPSV naturally draws people toward me or my business?
- Engagement - Which element of TPSV helps someone stay engaged?
- Conversion - Which element of TPSV supports a buying decision?
- Retention - Which element of TPSV tells clients to stay or return?

(pause for 3-4 minutes while members write their responses)

Step 2: Map TPSV to the Customer Cycle - 4 mins

Examine how TPSV influences each stage of the customer cycle.

> ***Suggested talking points:*** *Next, let's take a look at how your TPSV influences the customer cycle by*

reflecting on this second set of questions and noting which stage feels strongest and where friction shows up. Remember, just jot down quick notes!

Copy and paste in Zoom and/or display the corresponding slide:

Step 2:
- Awareness - Does your target market immediately recognize you as relevant to their situation?
- Engagement - Is the pain point articulated clearly enough to spark interest and conversation?
- Conversion - Does your service description help people understand why and how to work with you?
- Retention - Is the value you promise aligned with what keeps clients loyal or makes them refer others?

(pause for 4-6 minutes while members write their responses. Remind members to both reflect on the questions and also identify which stages of the customer cycle they are strongest and weakest.)

Step 3: Apply the 4 Actions Framework - 5 mins

Using the elements of the 4 Actions Framework, members will identify where they can eliminate, reduce, raise, or create to deliver greater customer value.

Suggested talking points: *Now that you've mapped your TPSV to the customer cycle, we'll turn those insights into practical adjustments using the 4 Actions Framework, a concept from the book Blue Ocean Strategy by Renée Mauborgne and W. Chan Kim. This step helps you see where your current approach is helping or hindering parts of the customer cycle.*

On your paper, please draw a simple four-quadrant grid labeled eliminate, reduce, raise, and create.

In the next few minutes, you'll look at your customer journey and identify one or two ideas for each quadrant. Focus on quick, concrete thoughts such as minor shifts in your messaging, process, or experience that could strengthen how clients move through your cycle. I'll share a few guiding questions to spark your thinking. Take a moment now to begin filling in your grid.

Copy and paste in Zoom and/or display the corresponding slide:

Step 3:
1. Eliminate - What steps, habits, or messages weaken any part of the cycle or distract from your core value?
2. Reduce - Where are you creating unnecessary friction, especially during engagement or conversion?
3. Raise - What should be strengthened to make you more visible, more trusted, or more compelling?
4. Create - What new asset, message, or experience would improve movement from awareness to retention?

(pause for 4-6 minutes while members write their responses)

Facilitation note: As needed, illustrate the exercise by sharing an example. Use your own or the one provided below:

Solopreneur running a Leadership Coaching Business:
1. Eliminate - Low-value services, unfocused content
2. Reduce - Intake friction, redundant questions
3. Raise - Thought leadership, testimonials
4. Create - Signature workshop, diagnostic tool

Peer Exchange - 13 mins
Members will move into small groups (3-4 members each) and receive feedback on their 4 Actions Framework Ideas.

> ***Suggested talking points:*** *Now, let's move into the peer exchange portion of the activity.*
>
> *You've each mapped your TPSV to the customer cycle and drafted ideas in your Four Actions grid. Now you'll pressure-test those ideas with each other. In a moment, I will place you in breakout rooms of 2 or 3. Each person will have approximately two minutes to share a few of their top ideas from the 4 Actions Framework activity. Go into a little more detail as to why you came up with the idea and why. Each person takes about 2 minutes for their share.*
>
> *If you're not sharing, then you will be listening and then offering brief advisory feedback. Focus your responses on clarity and practical insight, asking clarifying questions or offering reflections such as "Here's an opportunity you might be overlooking," or "X element in your grid feels especially strategic for your target market." Keep your feedback concise so everyone has time to share.*

(Place members into breakout rooms for their peer exchange discussion. Send a broadcast message through Zoom when they have 1 minute remaining.)

(optional - if time allows) Insight Harvest
Prompt members to share what they learned or are taking away from this experience and how they plan to use this in the coming days. You might also ask if they heard any ideas or shares from another member that they'd like to learn more about or follow up on. This can foster a sense of connection among members ahead of the next meeting while also offering a chance to dive deeper into practical peer guidance. Some potential prompting questions include:
- What surprised you in what others shared?
- Did you notice any themes or shared challenges?
- Any "aha" moments or sparks for action?
- Did anyone share anything you want to follow up on or learn more about?
- What is an idea percolating for you that you could use some peer support to work through more?

Key takeaway: Seeing how the target market, pain point, service, and value connect to the customer cycle creates a coherent view of how customers move from awareness to long-term engagement. This context makes the 4 Actions Framework more effective because the decisions to eliminate, reduce, raise, or create are grounded in a full understanding of how customers think and behave at each stage. The result is a set of actions that align with real customer needs and deliver a clear, differentiated experience, which strengthens trust by showing that choices are intentional and consistently oriented toward customer outcomes.

Wrap Slides - 5 mins

Take a brief moment to review the Wrap Slides and align on upcoming meeting dates.

Closing Reflection - 5 mins

Close out the meeting with intention by prompting members to reflect on insights and translate the discussion into personal or collective meaning. This ensures that members leave grounded, motivated, and ready to apply what they've gained.

Individual Reflection.

Close out the meeting by providing members the space to share final reflections and takeaways, and meaningfully transition out of the Core space.

> ***Suggested talking points:*** *As we wrap up, I want to highlight why this work matters. Trust is the foundation of any successful business, and it grows when clients see that you understand their needs and deliver with clarity and intention. TPSV helped you define who you serve, the problem you address, the service you provide, and the value you create. The 4 Actions Framework translated that insight into focused improvements that remove friction, strengthen what works, and introduce new value.*
>
> *Taken together, these tools give you a clearer path to earning and sustaining trust. Even small, consistent adjustments can influence how clients find, choose, and continue working with you.*
>
> *Let's close by sharing one final reflection.*

Questions (choose one):

- What one action will you take for yourself or your business as a result of today's session?
- What do you want to explore further as a result of our conversation today?
- What are 1-2 words that describe how you're feeling as a result of the conversation today?
- What phrase or image stood out from our conversation today?

Resource Highlight.
Lastly, highlight any additional reading, thought leadership, or resources members can use to delve deeper into the theme. Some suggested resources are listed below. You are encouraged to add to the list by drawing on 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:
- Blue Ocean Strategy | W. Chan Kim and Renée Mauborgne
- 4 Actions Frameworks | Blue Ocean Strategy
- Market Opportunity Navigator | Case studies, worksheets, articles, and more!
- The Neuroscience of Trust | Harvard Business Review

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

Suggested Group Communications
Use the copy below to send the pre-meeting agenda and post-meeting summary via the Guide portal on Chief.com. We also recommend sending an email to the group 2 days before the meeting to encourage attendance and build enthusiasm about the conversation. 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 will examine how your business attracts, secures, and keeps customers—and then explore one shift you can make to strengthen customer value and trust.
>
> If you'd like to reflect beforehand (optional), consider: How can understanding your target market, customer pain points, service, and value reshape the customer experience and strengthen value and trust across their journey?
>
> 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 what it means to lead from your core. [*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:

- Blue Ocean Strategy | W. Chan Kim and Renée Mauborgne
- 4 Actions Frameworks | Blue Ocean Strategy
- Market Opportunity Navigator | Case studies, worksheets, articles, and more!
- The Neuroscience of Trust | Harvard Business Review

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

Next Session Preview: In our next session, scheduled for [date and time], we will explore how to create structure and consistency, allowing the business to run efficiently without relying solely on your time and energy.

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 and 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 to note 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.

Wrap Slides Review Guidance:

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. Also, encourage them 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.