

FORUM TOOLS

MODERATOR GUIDE

EQ TOOLS



Unresolved, emotionally complex questions are ideal for Deep Dive Explorations. EQ tools invite us to feel with, listen deeply and respond with resonant empathy.

IQ TOOLS



Faster paced, on point, crisp. Forum members think together with examples, ideas, experiences or lessons. Perspective and learning in thoughtful discussions.

DEEP DIVE EXPLORATION

TIME: 60 minutes

A powerful tool to frame and explore unresolved topics with high emotional complexity. The Presenter shares their situation, journey and question as a gift to the Forum, who respond with self-curiosity and resonance. Detailed resources for deep dive mastery can be found online.

FULL DISCLOSURE

TIME: 10 - 15 minutes

A member shares in depth, requiring more time than the monthly 5% Update/Reflection provides. One-way disclosure, no responses or experience sharing provided.

MODERATOR INSTRUCTIONS

- Set timer for requested time (15 min. max.)
- Reminder: no questions or experiences shared.
- Member speaks, uninterrupted.
- Member may choose Attila-the-Hun confidentiality (*never to be mentioned again by anyone except its owner*).

BLIND WINDOW FEEDBACK

TIME: 15 minutes

From the Johari Window. We share more deeply from the Hidden Window requesting Forum member feedback into our Blind Window. 'Blind spot' insights can be useful information as we ponder a decision, situation or challenge. Members may request feedback to be specific and focused or more general observations from their forum members.
NOTE: for experienced forums, who know each other well.

MODERATOR INSTRUCTIONS

- Member presents summary/key points of the situation in a group of 3 or 4 members (5 minutes)
- The Member turns their back to the group, listening as remaining forum members share blind window feedback
- Ensure all members have an opportunity to offer curiosity and insights into the blind window (5-7 minutes)
- IMPORTANT: no judgment or advice. All members have a curious mind with respect and compassion
- Invite the member to turn back to the group to share any feedback or thoughts (2 minutes)

ROLE PLAY

TIME: 15 - 30 minutes

A forum member wishes to practice an important, upcoming conversation. They can role play themselves, or, if useful, another forum mate can assume the member's role and the member emulates the other party.

MODERATOR INSTRUCTIONS

- Member chooses forum member to Role Play, providing them relevant information and background (e.g.: personality, objectives, ulterior motives)
- Members have a 'mock' conversation, focused on the concern, dispute or challenge
- Observers may contribute a short 'I noticed' question, thought or concern, if time permits.

LIGHTNING ROUND

TIME: <10 minutes

A simple question, included on the agenda or raised in meeting. Forum members have relevant information top of mind or may arrive prepared to share succinctly.

MODERATOR INSTRUCTIONS:

- Our Objective: Gather fast input from the group.
- Question may be provided ahead or impromptu. (*ie. How much emergency cash do you keep on hand? Useful /interesting content for a leadership offsite? How often do you meet with each direct report & why?*)
- Each member <1 minute for their contribution
- No full group discussion, just succinct, individual sharing

BRAINSTORM

TIME: 10 – 15 minutes

A focused question or situation, generating spontaneous ideation, without judgment. No questions, other than essential clarification. Scribe captures ideas so all can see, and result available to member(s).

MODERATOR INSTRUCTIONS:

- Member or moderator quickly frames a specific question or topic (i.e. Effective ways to retain top talent.)
- Appoint scribe to capture on flip chart or whiteboard
- Silent moment: Write a few ideas on own. (1 min)
- Moderator gathers one idea from each member, every member adding something from their list (1 min)
- Open floor to random contributions; ideas and thoughts as they occur to us; original & generative
- Our objective: to generate as many unique, interesting and novel ideas as possible. No debate or disagreement
- Originator welcome to take Flip Chart pages and/or anyone interested can take a photo

ROUND TABLE DISCUSSION / TOPICAL DISCUSSION

TIME: 20 – 30 minutes

Topics may be scheduled in advanced (noted on agenda) or impromptu. Often used for general topics, or a member may frame a specific issue or question. Moderated discussion is directed to the *topic*, not towards the individual member who requests it. The group can reflect, research and prepare when topic is provided ahead and on meeting agenda.

MODERATOR INSTRUCTIONS

- Moderator introduces the topic and sets the discussion's focus and boundaries
- Use a publicly displayed timer to keep discussion crisp
- Keep the conversation on topic. Don't debate, politic or preach.
- Our objective: to share experiences and expertise to expand our understanding of the topic, alternative perspectives and divergent ideas. (2-3 minutes per person).

NEEDS & LEADS

TIME: 8-10 minutes

NEEDS: Members makes a specific request to the group. 'Needs' may be in the form of a question, a connection or another specific request.

LEADS: Members may share a recommendation for other Forum member's benefit. It may be a positive (*or negative*) experience with a vendor, supplier or client.

LEARNING EXCHANGE

Podcast, Book, Video.

TIME: 20-60 minutes

Content is suggested in advance to read, watch or listen, as pre-work for an informed discussion.

MODERATOR INSTRUCTIONS

- A member provides the framing and focus of the discussion
- Each member summarizes what they learned, took away or intends to incorporate into their thinking or habits
- If useful, a scribe can capture key points of the discussion for the Forum's future reference

INTERNAL EXPERT

TIME: ~30 minutes

A member of your forum (or chapter) may have relevant, deep expertise to share on a specific topic. This may be anything from recently acquired knowledge to long time, professional expertise.

MODERATOR INSTRUCTIONS:

- A member agrees to present now or in the future (*planned or impromptu*)
- When planned, it may be useful to hold the Forum Meeting at a relevant location (*ie. their plant or office*)
- Member presents for 10-15 minutes, with visuals if useful
- A moderated Q&A session for 10 – 20 minutes, closing sharing with each member's take-home value or learning
- No debate or opinions are shared, our objective is unique, diverse and innovative ideas and thinking.

EXTERNAL EXPERT

TIME: 30 - 60 minutes

Some parking lot questions / subjects benefit from a credible external expert's knowledge and expertise. Identify and invite an expert to the meeting, providing clear expectations of the topic and timing, as well as background on the forum.

MODERATOR INSTRUCTIONS

- Identify and contact an available expert for a parking lot topic where specific expertise is essential, (*IE: mental health, financial planning, tax planning, executive comp, child psychologist, employment law, ESOP plans, etc.*)
- Introduce the speaker, who is prepared to speak for up to 15 minutes
- Moderate a Q&A group conversation with full engagement, ensuring detailed or specific questions are taken offline (*members can be provided the expert's contact information*)
- Close after 30 minutes (or as agreed) with a debrief or experience share, when useful

FACILITY or VENUE TOUR

TIME: 30 – 60 minutes

Facility or venue tours may provide an interesting space to meet and learn, where a tour can follow or proceed a regular Forum meeting, or it may be offered as an optional event. Tours are most effective when a local guide or peer can lead the tour, with a useful Q&A session during or after the tour. Clear communication and preparation for the Guide is essential.

MODERATOR INSTRUCTIONS

- Communicate clear instructions to forum or arrange transportation to/from the venue. Coordinate all details with key contact at venue
- Determine if there is a private, appropriate space to hold the remainder of the Forum Meeting on site