

Forum Next Level program guide



What is Forum?

Philosophy of Forum

- Forum is a confidential, safe place to be authentic and have real conversations with my entrepreneurial peers
- I come to Forum for my own self-discovery and growth. It is my responsibility to listen for my own value in each meeting
- I am inspired by my Forum mates as they share their journeys of challenge and success
- We create collective wisdom as we learn and grow together

Forum is:

- A peer-to-peer group to support self-discovery
- A judgment-free, confidential, safe space to share our stories and experiences
- Consistent membership of 6-10 EO Forum-trained members
- Regular meetings, led by a peer moderator
- Standard agenda, featuring 5% Reflections and Deep Dives

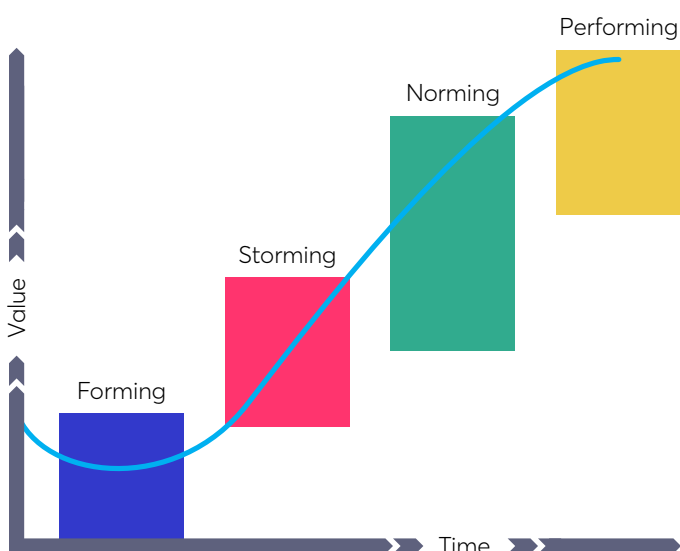


Forum is not:

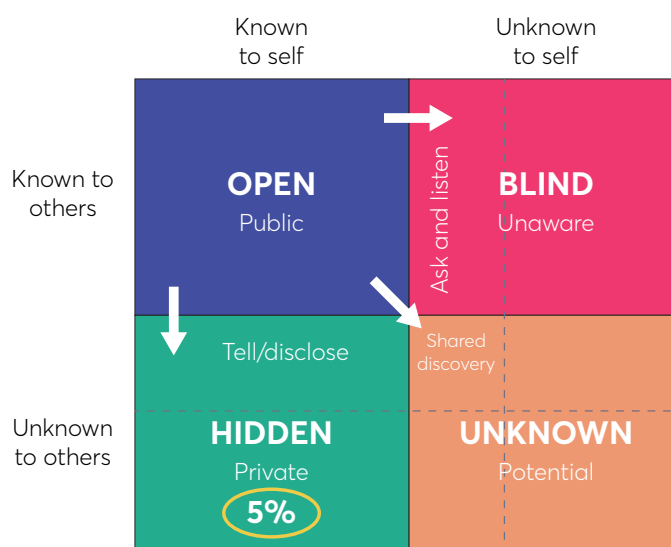
- A fix-it group
- A social club
- A therapy group
- A networking group
- Seeking or giving advice
- Judgment or the right answer



Tuckman model



Johari Window



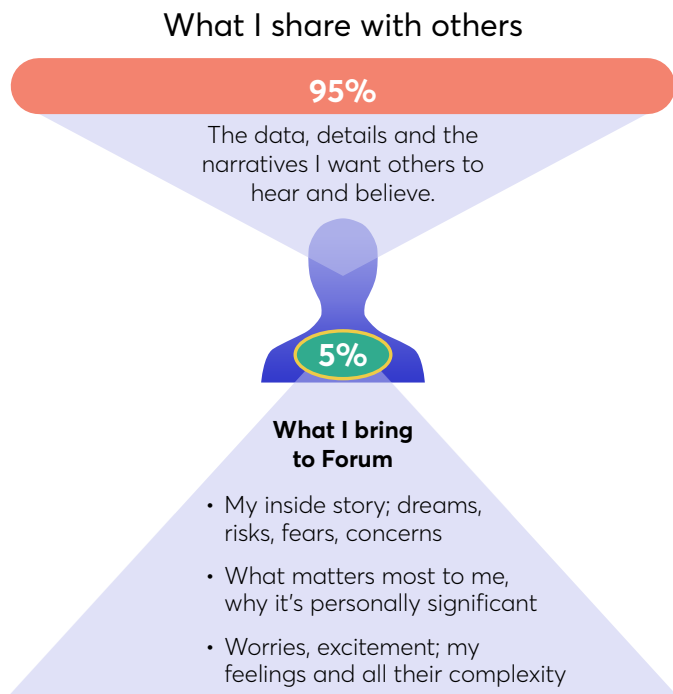
Did you know?

Many Chapters offer Forums for Spouse/Life Partners (SLPs), Key Executives (KE) and adult children. Ask your Forum chair what types of Forums are available in your chapter. EO offers regional, experience and industry Forums.

Forum Cornerstones



Vulnerability



Confidentiality

No one, nothing, never

Why?

- Support authentic, deep sharing

What?

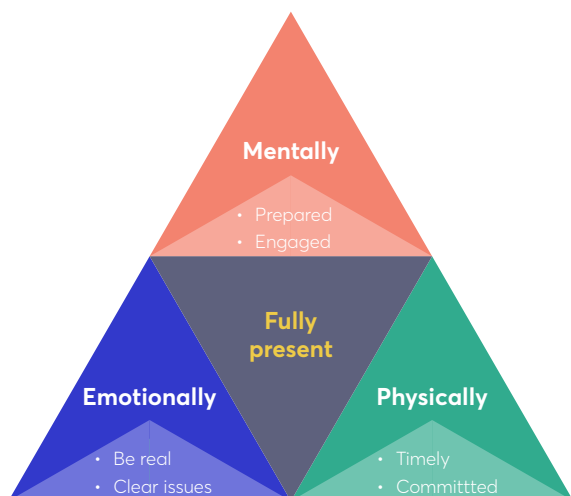
- Learnings can leave; stories always stay
- Each Forum needs clear, shared agreements

"Forever" Members are bound by Forum Confidentiality forever, whether they remain in Forum or not.	"No gossip" Never talk about another Forum member who is not present.
"Walls have ears" Forum must always be fully private-nothing overheard or intercepted. NO text, email, voicemail for confidential matters.	"No pillow talk" Never share others' stories/details with anyone, even spouse/partner, they are NOT our stories to share.

Consequences

1. Offenders automatically expelled.
2. Opportunity to apologize and discuss with Forum.
3. Re-admittance ONLY with unanimous vote.

Personal Responsibility



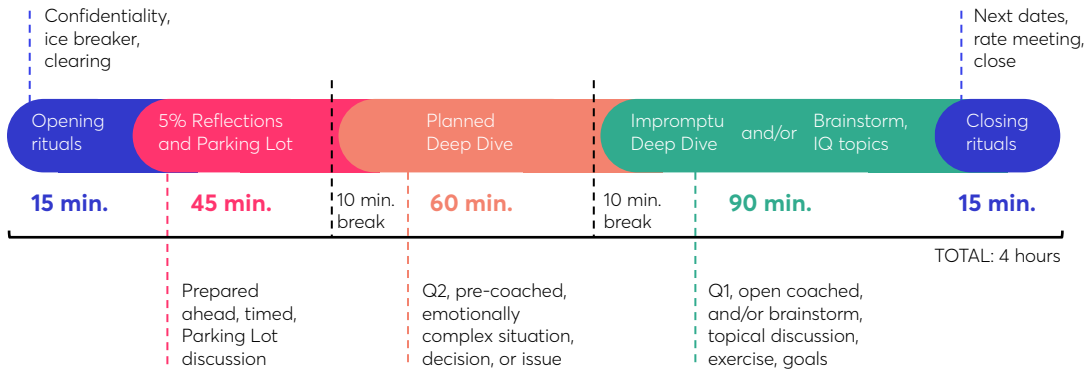
Forum Mindset



Forum meeting



Monthly agenda



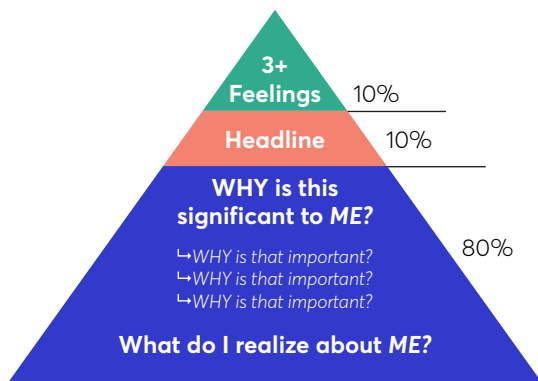
Location?

- Private, confidential space
- Home, office, private room

Date and time?

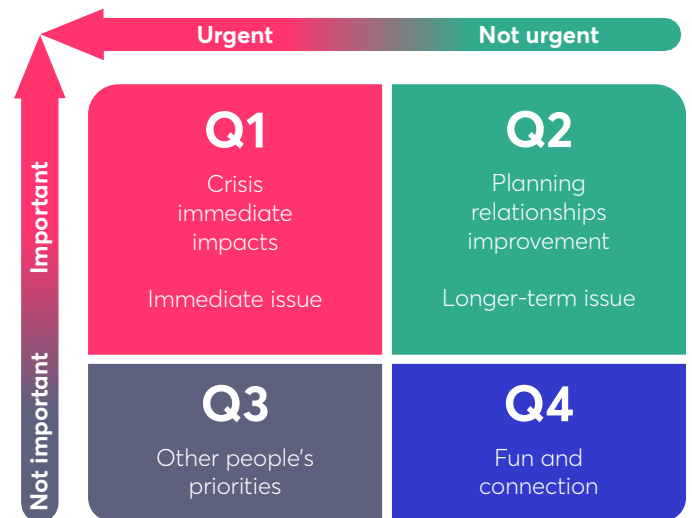
- Once a month—usually 4 hours
- Scheduled 6–12 months in advance

5% Reflections



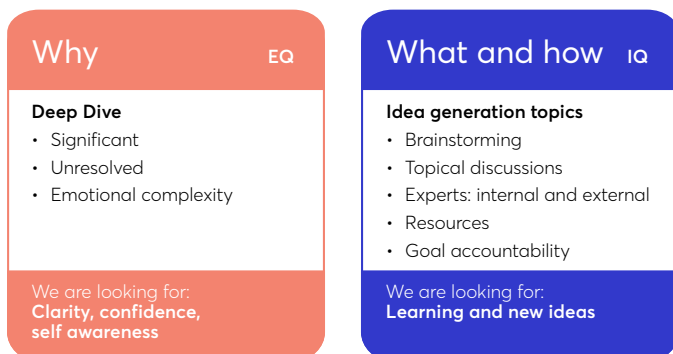
- I do my 5% Reflections for me, not to update my Forum
- It takes time to reflect, prepare and dig below the story to unearth my 5% significance
- My 5% are thoughts, feelings, beliefs, epiphanies, self-realizations—not the situation
- I can learn about myself when I listen to your 5%

Parking Lot

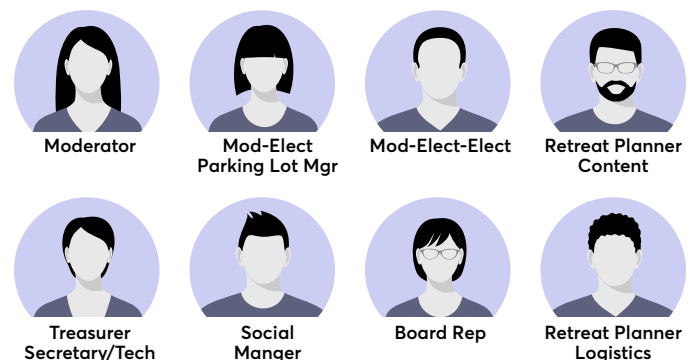


Powerful Deep Dives are always important, yet often not urgent.

Deep Dive vs. other tools

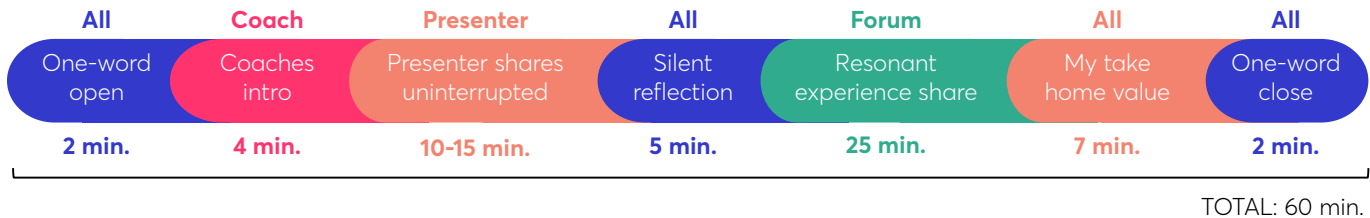


Roles



Deep Dive agenda

Planned—coached between meetings



Open coached



Four skills of coaching

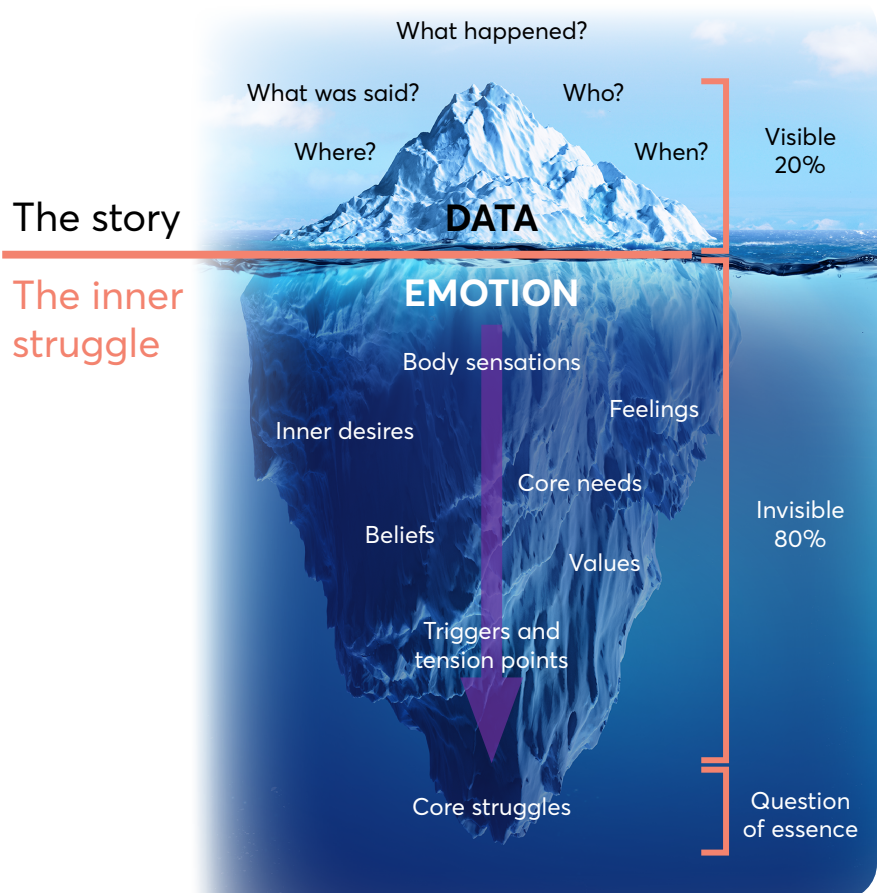
- 1. Quiet mind**
Resist solving. Just listen.
 - 2. Reflect back**
Repeat what you here, see, notice
 - 3. Listen for the struggle BENEATH the story**
Where is the challenge?
 - 4. Focus**
Which struggle is strongest?
-

A Deep Dive is...

- An opportunity to share ANY topic that is important, unresolved and emotionally complex
- An opportunity to hear resonant experiences
- A gift of vulnerability to your Forum

A Deep Dive is not...

- A therapy session
- A fix-it brainstorm
- An opportunity to debate solutions



5% Reflections worksheet

	FEELINGS Strongest feelings this past month. Single words (joy, sad etc.) 3-5 words each box	HEADLINE What caused these feelings? Only one sentence	SIGNIFICANCE (5%) How was this <u>personally</u> significant to me? Dig deep!
Work			
Family			
Personal			
Next 30–60 days			

A significant, emotionally complex and unresolved challenge or opportunity I would like to explore further is...

Feelings inventory

The following are words we use when we want to express a combination of emotional states and physical sensations. This list is neither exhaustive nor definitive. It is meant as a starting place to support anyone who wishes to engage in a process of deepening self-discovery and to facilitate greater understanding and connection between people.

There are two parts to this list: Feelings we may have when our needs are being met, and feelings we may have when our needs are not being met.



FEELINGS WHEN YOUR NEEDS ARE SATISFIED

AFFECTIONATE

compassionate
friendly
loving
open-hearted
sympathetic
tender
warm

ENGAGED

absorbed
alert
curious
engrossed
enchanted
entranced
fascinated
interested
intrigued
involved
spellbound
stimulated

HOPEFUL

expectant
encouraged
optimistic

CONFIDENT

empowered
open
proud
safe
secure

EXCITED

amazed
animated
ardent
aroused
astonished
dazzled
eager
energetic
enthusiastic
giddy
invigorated
lively
passionate
surprised
vibrant

GRATEFUL

appreciative
moved
thankful
touched

INSPIRED

amazed
awed
wonder

JOYFUL

amused
delighted
glad
happy
jubilant
pleased
tickled

EXHILARATED

blissful
ecstatic
elated
enthralled
exuberant
radiant
rapturous
thrilled

PEACEFUL

calm
clear-headed
comfortable
centered
content
equanimous
fulfilled
mellow
quiet
relaxed
relieved
satisfied
serene
still
tranquil
trusting

REFRESHED

enlivened
rejuvenated
renewed
rested
restored
revived

Feelings inventory (continued)

FEELINGS WHEN YOUR NEEDS ARE NOT SATISFIED

AFRAID

apprehensive
dread
foreboding
frightened
mistrustful
panicked
petrified
scared
suspicious
terrified
wary
worried

ANNOYED

aggravated
dismayed
disgruntled
displeased
exasperated
frustrated
impatient
irritated
irked

ANGRY

enraged
furious
incensed
indignant
irate
livid
outraged
resentful

AVERSION

animosity
appalled
contempt
disgusted
dislike
hate
horrified
hostile
repulsed

CONFUSED

ambivalent
baffled
bewildered
dazed
hesitant
lost
mystified
perplexed
puzzled
torn

DISCONNECTED

alienated
aloof
apathetic
bored
cold
detached
distant
distracted
indifferent
numb
removed
uninterested
withdrawn

DISQUIET

agitated
alarmed
discombobulated
disconcerted
disturbed
perturbed
rattled
restless
shocked
startled
surprised
troubled
turbulent
turmoil
uncomfortable
uneasy
unnerved
unsettled
upset

EMBARRASSED

ashamed
chagrined
flustered
guilty
mortified
self-conscious

FATIGUE

beat
burnt out
depleted
exhausted
lethargic
listless
sleepy
tired
weary
worn out

PAIN

agony
anguished
bereaved
devastated
grief
heartbroken
hurt
lonely
miserable
regretful
remorseful

SAD

depressed
dejected
despair
despondent
disappointed
discouraged
disheartened
forlorn
gloomy
heavy-hearted
hopeless
melancholy
unhappy
wretched

TENSE

anxious
cranky
distressed
distraught
edgy
fidgety
frazzled
irritable
jittery
nervous
overwhelmed
restless
stressed-out

VULNERABLE

fragile
guarded
helpless
insecure
leery
reserved
sensitive
shaky

YEARNING

envious
jealous
longing
nostalgic
pining
wistful

Deep Dive: presenter's worksheet

Complete prior to your coaching session to help you organize your thoughts and dive into the complexities of your situation. You can use this structure as a basic outline for your Deep Dive. You may rework or update the document after your coaching session to include deeper issues uncovered.

1. HEADLINE OR SUMMARY STATEMENT

What do I want to explore with the Forum?

2. CONTEXT

a. Background:

b. Current situation:

c. Next steps I am considering:

3. DIVING DEEPER INTO MY STRUGGLE

a. What is hardest for me?

b. How might my own actions be contributing to the challenge I face?

c. Where am I stuck?

d. What do I most want to change?

Deep Dive: presenter's worksheet (continued)

4. MY FEELINGS

a. My strongest fear/uncertainty/concern:

Feelings/emotions	Where are these coming from? Thoughts/story creating these feelings...

b. A metaphor or image that comes to mind that describes my situation:

5. LOOKING FORWARD

a. My hope, dream or ideal outcome is...

b. What would failing mean for me and those around me?

c. What would success mean for me and those around me?

d. Are there any beliefs or biases I might need to shift in order to get what I want?

e. My core opportunity or dilemma might be...

Deep Dive: coach's "cheat sheet"

Coaching supports powerful Deep Dives that focus on our inner struggle, rather than details of my story/situation. My Forum mates listen to connect to their own resonant memories or struggles and share those vulnerably.

PREPARE

- Coach and presenter meet one to two weeks BEFORE Forum Deep Dive (not day of meeting).
- Meet in a comfortable, private space. Plan for an uninterrupted hour.

Coaching mindset	Coaching tips
• Listen curiously to help find the inner struggle beneath the current situation • Reflect back what you hear and notice • Silence is powerful; listen more than speak • No problem solving or experience sharing • Emotions lead to depth	• Ask open-ended questions, "Tell me more..." "Help me understand..." "Why..." • Notice body language or tone of voice and inquire as to meaning • Listen for powerful words or metaphors • Where does the conversation return to, repeatedly? • What emotions are most powerful? What lies beneath them?

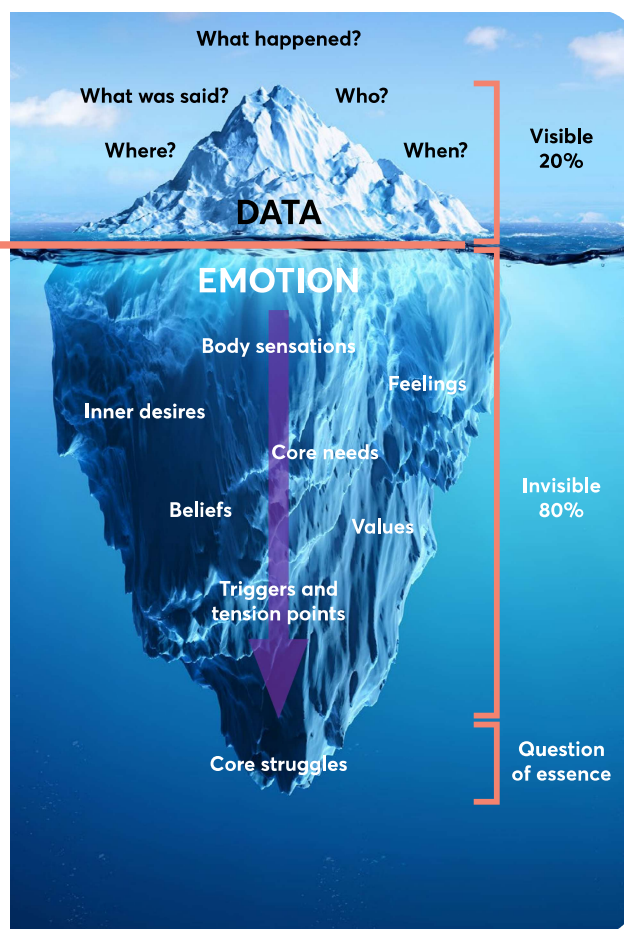
FOUR SKILLS OF COACHING

- 1. Quiet mind**
Resist solving. Just listen.
- 2. Reflect back**
Repeat what you hear, see, notice
- 3. Listen for the struggle BENEATH the story**
Where is the challenge?
- 4. Focus**
Which struggle is strongest?

Sample coaching questions:
• What's on your mind? • What are your strongest emotions about this? (ask at different points of the conversation) • What is the real challenge? • What question do you hope to answer for yourself? • Of everything you've shared, what are you most troubled by, uncertain about, or stumped by? • What do you want? • If you could wave a magic wand, what would it look like?

The story

The inner struggle



Deep Dive: coach's introduction

INTRODUCTION

The core of this opportunity or challenge? *(A single sentence, in the PRESENTER'S words)*

The struggle(s) beneath this story I heard:

Feelings I heard:

Something I heard (or noticed) that I want to share:

DEEP DIVE COMMUNICATION STARTER:

Think of a time when you felt _____ (presenter's strongest feeling)
because _____ (a general description of the situation).

Example: Remember a time when you felt frustrated because an important person in your life was holding you back.

NEXT LEVEL DAY FORUM AGENDA

Plan	Actual	
:00		Arrive - One word check-in - Electronics off and put away - Confidentiality agreement 1 min of silence
:10		Communication Starter - Name - Years in EO - One powerful EO moment and its impact on my life
:15		5% Reflections 3-5 minutes per member - Parking Lot Discussion - Identify Deep Dive Open Coached Topic and brainstorm topic for today (a WHY & HOW topic)
1:15		BREAK – 10 Min.
1:25		Deep Dive - WHY Topic - Open Coaching (See Deep Dive agenda below)
2:25		BREAK – 10 Min.
2:35		Alternate Format - HOW topic - Brainstorm (See handout)
2:55		Housekeeping - What worked, what could have been better - Most impactful take away for me - One word check-out

5% REFLECTIONS - MONTHLY

The monthly 5% Reflection segment is an opportunity for members to share their most significant moments and impact over the past month in their business, personal and family life.

Come to your Forum meeting having prepared your 5% Reflection and reflected to what you intend to share and why it was significant to you.

DEEP DIVE

The Deep Dive is the section of the meeting when a member shares where they feel stuck or seek clarity on an opportunity or issue that is emotionally complex, unresolved and personally significant to them.

This is an opportunity for members to share resonant experiences and learn from each other.

DEEP DIVE AGENDA

What	Who	Planned DD/ Scheduled Coaching	Impromptu DD/ Open Coaching
One word open, confidentiality	Moderator	Less than 1 minute	Less than 1 minute
Coach's intro Communication starter	Coach/All	5 minutes	–
Deep Dive (no interruptions)	Presenter	10 minutes	15 minutes
Silent reflection	All	3 minutes	3 minutes
Reminder: listen for own value	Moderator	Less than 1 minute	Less than 1 minute
Resonant Experience sharing	All	3-5 minutes each	About 25 minutes
Individual take-home value	All, with presenter last	5 minutes	5 minutes
One word close	All	2 minutes	2 minutes



3-STEP BRAINSTORMING SESSION

Timing

10 – 12 minutes. Set a timer.

Objective

- Generate MANY new ideas. Creative, crazy, interesting, new.
- Rules: No arguing, no discussing, no dismissing an idea, no judgment, no solving, no selling ideas. Just generate a lot of interesting ideas. Build on it, make it better.
- Tools: Flip charts or white board

Setup

We aren't looking for the "best" answer—we are looking to generate new thoughts, new ideas and new perspectives.

2 min	Identify the question. What is it exactly that we are looking to generate new and creative ideas about?
2 min	Each person writes down their own thoughts.
5–7 min	• Set the timer for 5, 6 or 7 minutes (whatever time is available). • Go around the group, inviting each member to contribute a single idea. • Don't repeat what someone else says, contribute something else you wrote down. • Once you have done a round or two from the written ideas, open it up to the group. Now anyone can speak whenever, and they can contribute another new idea or add to an existing idea; change it, combine it with another idea, be silly, be ridiculous, be bold, listen, think and contribute when something pops into your brain. • Fill up many sheets—lots of white board. • Can use "mind mapping" technique if you like—you start in the center and then add to ideas in a nonlinear fashion. • When time is up (or when the group runs out of ideas), then stop.
1 min	Invite anyone who is interested to photograph the results. Give the paper (if on flip charts) to the person who requested the brainstorm. Discuss confidentially.



Forum workshops

Forum core content workshops

FORUM ESSENTIALS and TOOLS **Increase meeting effectiveness**

- Review agenda, structure and processes
- Deepen Forum Mindset to increase vulnerability and trust
- Strengthen understanding/commitment to 5% content
- Build strong Parking Lot and Deep Dive schedule
- Develop coaching mindset and skills
- Practice coaching and unplanned Deep Dive

MASTERING COACHING: Become a skillful coach

- Learn and practice coaching mindset and skillset
- Use presenter and coaching worksheets
- Build coaching skills for Forum, business and life

DEEPER CONNECTIONS: Explore deeper levels of trust and sharing

- For connected, effective Forums
- Structured approach to blind window sharing
- Share more deeply, explore blind window

GOALS AND ACCOUNTABILITY: Set goals and create Forum accountability

- Set meaningful goals for Forum support
- Establish accountability partners
- Design ongoing accountability in Forum

Leadership for Forum workshops

Leadership skills for Forum and life

STORYTELLING: Tell powerful stories

- Understand story structure and archetypes
- Craft and deliver authentic, powerful stories
- Improve your storytelling in Forum and life

LIVE YOUR LEGACY: Build a plan, live with intention

- Why and core value discovery
- Design your life; today and future
- Actionable individual plans and Q2 Forum topics

To book a workshop for your Forum, please connect with your chapter manager or Forum Chair:
<https://www.eonetwork.org/member/forum/request-forum-training/>

For assistance, email Forum@eonetwork.org

PLEASE NOTE!

Forum workshops are not designed as interventions for a Forum in crisis, rather to support Forum effectiveness and value. If your Forum requires immediate support, contact your local Forum chair, regional Forum expert or a Forum trainer.

EVOLVING EO'S FORUM TERMINOLOGY

Entrepreneurs' Organization is evolving the Forum terminology that we use within the organization. After consulting EO Forum Trainers, and taking into account the insights of EO members who participate in Forums, it's clear that the terminology we use needs to be simplified, updated and improved to better reflect the true essence of Forum. With this development, Forum will maintain and keep the fundamentals of our program intact, while achieving better participant understanding of these terms.

PREVIOUS TERM NAME	NEW TERM NAME	REASONING
EO Gestalt Mindset	Forum Mindset (Gestalt)	The term "Gestalt" has other connotations in the psychology field, and does not represent what we do in Forum: "Gestalt maintains that the whole has a reality of its own, independent of the parts." When members ask for books or references, there are none to show as accurate sources. The Forum Mindset is a more accurate term that includes the experience share approach, no judgment, no advice. Leaving "Gestalt" in parenthesis was important to keep context for past members.
Updates	5% Reflection	The term Updates suggests a report of things that happened. It also takes the focus away from introspection, and it focuses on "updating" the group with tasks that are not significant. The term "Reflection" invites the member to reflect on things and not only to report them. The widely understood 5% term was added as a descriptor to suggest we should only be speaking about the 5% in Forum.
Forum Presentation	Deep Dive	The term Presentation suggests that a subject matter expert prepares a PowerPoint and presents in front of a room, which is contrary to the essence of what happens in Forum. Deep Dive represents the essence of going below the surface, with a support system for success (since one should never dive alone in open waters). This term offers great analogies, such as: Going under the surface, (diving deeper), going down to the core of the issues (ie: iceberg, 80% of the mass is underneath), needing to be certified to dive, sharing your oxygen with people in need, having a diving buddy who shines the light under corals, etc.
Advanced Forum Series (AFS) Jump Start (AFS) Shift into High Gear (AFS) Fired Up (AFS) Fast Track (AFS) Dive Deep (AFS)	Forum Workshops Forum Launch Forum Essentials Forum Tools Goal Setting & Accountability Deeper Connections	EO is filled with acronyms and most members don't understand what an AFS is. The previous AFS names were picked from a Driving theme that is no longer relevant. We simplified the terminology to accurately represent what is covered during each workshop.