



PRESIDENTS' TRAINING LIFECYCLE (PTL)

LEAD

**CHAPTER PRESIDENTS'
JANUARY/FEBRUARY
CURRICULUM**

Welcome to the **LEAD** portion of your Presidents' Training Lifecycle. In this workbook, you will find the **best practices** and **key actions** to take to ensure you and your board finish the year strong.

WHAT THIS MODULE WILL TEACH YOU

1 HOW TO KEEP YOUR BOARD MOTIVATED AT THE HALFWAY MARK



2 USING YOUR MAP



5 HOW TO WORK EFFECTIVELY WITH YOUR CHAPTER STAFF



3 HOSTING A MID-YEAR CHECK-IN



4 TOP FIVE TACTICS FOR ENGAGING YOUR CHAPTER MEMBERS

HOW TO HAVE AN IMPACTFUL SECOND HALF OF THE YEAR

MINDFUL QUESTIONS:

What are two things you want your chapter to continue doing after you've stepped out of the role?

What is one thing a past president told you before your year that you've found helpful?



ACTION
WATCH VIDEO 1

2

REVISITING YOUR MAP/ ACTION PLAN

REVIEW YOUR MAP

It may feel like a distant memory, but you and your board invested hours and hours developing your Measurable Accountability Plan (MAP) with your facilitator during your virtual Strategy Summit held early in the year.

- 1. If you hosted an EO-facilitated Strategy Summit, revisit your detailed notes housed on Samepage.**

Have you been successful in measuring your performance against the plan's 30-, 60- and 90-day targets?



ACTION

IF YOU HAVE A MAP, TAKE IT OUT NOW TO REVIEW YOUR PROGRESS.

2. Things to consider when reviewing your MAP:

What to do if you've accomplished it all?	What to do if you haven't?
<p>If you have achieved the goals set at your initial Strategy Summit already, take a moment to celebrate this success. Your board has smashed their targets and deserves recognition.</p>	<p>It's not over yet! There are still a few months until the fiscal year closes.</p> <ol style="list-style-type: none"> 1. Bring up the MAP and share it with your board during the next board meeting to remind them of their responsibilities and re-emphasize their accountability. 2. After discussing stuck points and successes, you may want to host a mid-year summit to regain traction from earlier in the year.
<p>Once you've celebrated, shift focus! To keep momentum for the remainder of the year, pivot your focus to succession planning.</p>	<p>If you are still feeling stuck with your chapter's progress and revisiting your MAP does not resolve your challenge, consult with your regional council for additional support.</p>
<p>To maximize the effectiveness of the incoming board, ensure that your outgoing chairs have planned their hand-over, including a clear understanding of how to work with incoming chairs to continue to build on existing strategies.</p>	<p>Here's how:</p> <p>Step 1: Your area director is the first person to reach out to in terms of gaining support. Your area director has been a chapter president and likely has a lot of lessons to share.</p> <p>Step 2: If your chapter is struggling with a particular product (eg, learning, Forum, etc.), there are multi-functional directors (MFDs) on the regional council who can provide support on a specific matter. In addition, MFDs can arrange collaborative opportunities within the region to better support you in leveraging EO's products.</p>

SUPPORT DIRECTORY FOR YOUR REGIONAL COUNCIL

Where can I find the infographic for my RC network?

The best way to figure out who's on your regional council board is to review the infographic page in the Samepage group. If you're not sure where that is, reach out to your regional manager and/or Member Services Centre staff on eonetwork.org

**SAMEPAGE
GROUP**

**REGIONAL
MANAGER**

**MEMBER SERVICES
CENTRE (MSC)**



**ACTION
WATCH VIDEO 2**

3

HOSTING A MID-YEAR CHECK-IN

MINDFUL QUESTIONS:

What's one tactic you are going to leverage to keep board energy high during this lull?

Who is one board member you need to connect with? Why?
When will you meet with them?

Do I really need to do a check-in?

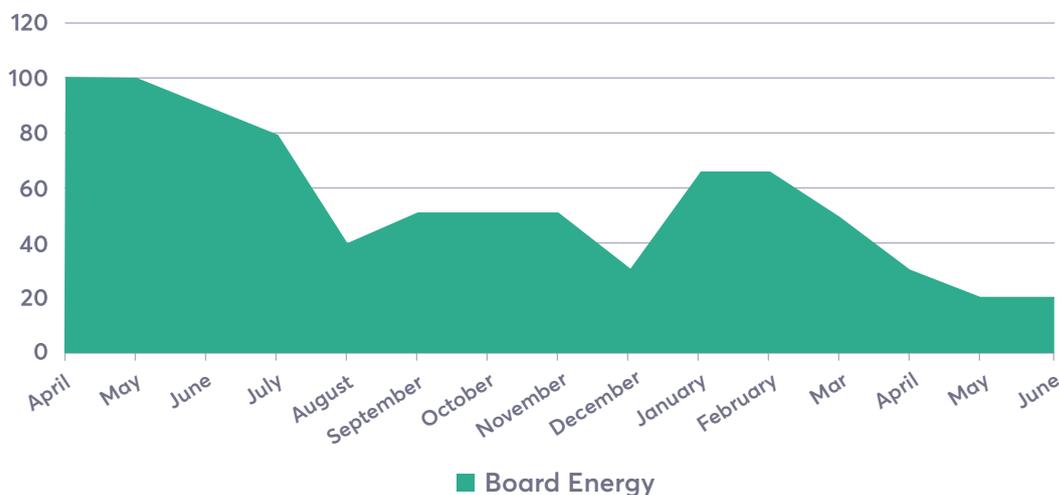
You set your chapter plan before the start of the fiscal year and everyone was energized and excited to get started. Then life happened. Does the board even remember what the priorities are?



ACTION
CAN YOU LIST YOUR BOARD'S TOP PRIORITIES FOR THE YEAR? NO PEEKING!

Mid-way through the year is a common time for the board to hit an energy lull. This makes it a great time to plan something to re-energize!

Average Board Energy Over the Fiscal Year



THE VALUE OF A MID-YEAR SUMMIT

The Mid-Year Summit is a great way to check in with your board on the chapter's progress towards the priorities, success metrics and action items that were put in place at the beginning of the year.

It's also the time when you might decide to shift your original goals or make new ones more relevant to where the chapter is (or perhaps you even hit your original goals and want to continue to reach beyond them).

There are two ways in which you could decide to host a summit.

1. Hire an EO facilitator

- This is the best action for any chapter that hired an EO facilitator at the start of their year. They will come prepared with your original MAP (Measurable Accountability Plan).

Hot tip! Check with your regional staff, as subsidies may be available.

2. Hire an outside facilitator

- If you are using another system to track priorities and metrics, it is best to bring in an outside facilitator.
- Costs will vary.

If I don't want to host a Mid-Year Summit, what are my other options?

BOARD DINNER

A board dinner may also be held in conjunction with a Mid-Year Summit, but in the case that you may not be able to get the entire board to commit to a full day and night to meet, it can also act as an alternative option.

It is a best practice to have this dinner operate as a working dinner by hosting a board meeting to cover your progress and action items against your strategic plan over the course of the dinner. Keep in mind, this should be fun! Here are some examples from other chapters:

- Murder mystery dinner
- Private chef at someone's house
- Exclusive dinner with a famous chef (James Beard House in New York City)
- Cooking class
- Wine/whiskey tasting
- Picnic with family
- Dinner cruise

OTHER ACTIVITY IDEAS

Interactive experiences that allow the board to collaborate can be added to your mid-year check-in to encourage team building. Some additional ideas could include:

- Ropes course
- Ranch retreat/board retreat to some place for a night



ACTION
WATCH VIDEO 3

4

FIVE WAYS TO CHECK MEMBER ENGAGEMENT PRIOR TO RENEWALS

MINDFUL QUESTIONS:

How are you measuring member engagement?

POWER PACK YOUR CHAPTER'S MEMBER ENGAGEMENT STRATEGY TO ENSURE RENEWAL SUCCESS

Member engagement is all about building relationships with your members, adding unique value to their lives, and capturing their attention just often enough to remind them of the role EO plays in it.

Members join EO because they want to feel like they're a part of something. They want to connect, share and grow with their peers. However, it is unlikely everyone in your chapter has the same needs.

Members extract value differently based on their profession, age, location and interests. A meaningful engagement strategy should consider strategies for value creation for not only those who are highly involved in the chapter, but also, more importantly, for those members who have been inactive in chapter events or group interactions.



ACTION

WHAT ELEMENTS OF EO ARE MOST VALUABLE TO YOU?

EO has developed a handy toolkit for identifying which products and benefits to engage depending on the unique needs of each specific member. By identifying whether they fit into the identity of Forum fan, networker, leader or learner, you can tailor individual engagement opportunities that will most resonate with your members and maximize their likelihood of engagement. You can find the Member Journey toolkit [here](#).

Engaged members are more likely to renew their membership and act as a passionate advocate for the organization, its members and its values.

REFLECTION TIME!

- How engaged are your members today?
- What activities are engaged members participating in?
- How can you track the impact of these activities?
- How can you spark engagement before they miss their renewal payment?

The routes to building member engagement are as varied as your imagination. It's a tall order, but by using the right tactics, you'll be able to succeed. To help you do so, we have picked five smart tactics that can help you in the next six months of your term to ace the renewal season!

1. Personalized outreach (by you or chapter staff)

The "Likelihood to Renew" dashboard found on eonetwork.org offers a valuable look into individual members' level of engagement with the organization and the chapter. Check a member's record and see how engaged they are to identify where additional outreach may be needed. Have they attended an event in the last three months? When was the last time they logged in? Are they active on the chapter groups? If you see a pattern, reach out to the individual. First try email, then phone. No response? Send them a personal note. Each task takes less than five minutes and may nudge a member to re-engage.

2. Chapter-wide monthly e-blast from your desk

Think about your own communication strategy. How frequently are you communicating with your members? If they only hear from you in the quarterly newsletter or at your learning events, you may not be reaching out enough. You don't have to email them every week, but make a touch point every month. Keep them updated about chapter changes and updates, share unique member stories or highlight industry news.

3. Regular review of feedback received

By getting to know your members on a deeper, more human level, you'll be better positioned to understand who they are, what they want and how to keep them satisfied. A regular short feedback survey after events and mixers, open-ended suggestion box or town halls are important ways you can read into the minds of members and understand what is — and is not — driving value for them. Equally important is acting upon that feedback by altering plans, activities and initiatives to drive maximum member satisfaction.

4. Meeting with Forum moderators

Another way to understand member enthusiasm in the chapter can be to interact with the Forum moderators from chapter Forums. They can help create more personalized feedback on member satisfaction and raise any red flags to address. A quarterly meeting with the Forum moderators can add to a thorough member engagement strategy.

5. Chapter-specific member engagement survey

By asking members what's most important to them and what's missing from your chapter's current offerings, you can refine your engagement strategy to better suit your members' needs. A specific survey focusing on member engagement will ensure a better understanding of where you stand and what you can do to ensure a power-packed renewal season ahead of you.

GET INSPIRED BY YOUR PEERS

EO Gurgaon Integration Survey template

EO Gurgaon: https://docs.google.com/forms/d/1s-W49kFTuHno_H6Tv4XGWFj89yJqDmQOZix6LC-svao/viewform?edit_requested=true

Here are a few open-ended questions to get you started:

- Are there any industry-related topics you would like to learn more about?
- Which membership benefits are most valuable to you?
- Which EO products do you enjoy the most?
- What would you like to see more of on our social media? (EO events, member spotlights, industry-related news, etc.)
- Have you ever volunteered with EO? If not, what might encourage you to do so?
- What kinds of events would you like for us to host in the future?

INNOVATE TO STAY IN THE GAME!

While these are some of the ideas that we felt could be helpful, you can stay ahead of the curve by trying different and innovative ways to boost member engagement in your chapter. But remember, when you do that, don't forget to share it with us!



ACTION
WATCH VIDEO 4

5

MID-YEAR DEBRIEF WITH CHAPTER STAFF

In the dynamic and constantly-evolving EO world, chapter staff have proven to be the backbone of every chapter. Their knowledge, expertise, abilities, skill sets and experience are an invaluable resource in securing the future of the chapter.

As you pass on the leadership baton, be sure to engage your chapter staff and close the loop on the activities, initiatives and work that the chapter staff has been involved in throughout the year — doing so will ensure you close your term effectively.

It is also important that you evaluate the yearly performance of the chapter staff and share feedback for improvement.

Some ideas to make this process effective are listed below:

- Take performance feedback from incoming president and other board members
- Check with members individually or in your chapter survey to gather feedback
- Consult regional staff to check how involved your chapter staff has been in necessary regional/global activities, calls and initiatives
- Document the performance evaluation for future use



ACTION

SCHEDULE A DEBRIEF IN JANUARY OR FEBRUARY AND USE THE CHAPTER MANAGER CHECKLIST INCLUDED IN YOUR PTL LEAD RESOURCES TO ASSESS YOUR PROGRESS AND IDENTIFY WHAT REMAINS TO BE COMPLETED IN THE SECOND HALF OF THE YEAR



ACTION

WATCH VIDEO 5

Many will **start fast,**
few will **finish strong.**

– Gary Ryan Blair



ACTION
WATCH VIDEO 6



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