



PRESIDENTS' TRAINING LIFECYCLE (PTL)

ENVISION

PRESIDENT-ELECTS'
JANUARY/FEBRUARY
CURRICULUM

Welcome to the **Envision** workbook for president-elects embarking on their **leadership journey**.

This workbook is designed to help you reflect on **developing your goals** for your presidency and offers **steps for achieving them**.

LEARN HOW TO

1 TACKLE YOUR HOPES AND FEARS FOR THE YEAR AHEAD



2 ENVISION YOUR PRESIDENCY AND BEYOND



4 BEST PRACTICES FOR TRANSITIONING INTO YOUR NEW ROLE



3 LEVERAGE KEY RESOURCES

PERSONAL REFLECTION

ACTIVITY

What three things are you worried or apprehensive about in taking on the role of president?

ACTIVITY

What are your personal motivations for taking on the role of president?

ACTIVITY

What do you want to learn during your time in this role?



ACTION
WATCH VIDEO INTRO

**IN ORDER TO CARRY
A POSITIVE ACTION,
WE MUST DEVELOP HERE
A POSITIVE VISION.**

– Dalai Lama

WHY IS A VISION IMPORTANT?

A vision can unify your team



A vision can inspire and energize your team



A vision can help guide your team's priorities and planning



ACTION
WATCH VIDEO 1

ACTIVITY What is your chapter's three-year plan?	What vision do you have for your chapter?



ACTION
WATCH VIDEO 2

LEADERSHIP AND TRANSITION

SUPPORTING THE CURRENT CHAPTER PRESIDENT

While you prepare to become president, your current president will still be focusing on leading the board, finishing the year strong and leaving the chapter in a better place. As you progress over the next several months, working with the current president on the transition process will become more important.

Operational workflows will need to be addressed. Important information will need to be transferred and the transition of work from each board chair to their successor will need to be planned.

Developing a close working relationship with past presidents is a real benefit – you'll gain valuable perspective from those who have already faced similar challenges and situations as you will experience on your EO leadership journey.

BEST PRACTICES

- 1 In March, consider planning short, regular 1:1 calls or meetings with the outgoing president.
- 2 Establishing a "past president council" can be a good starting point to gain insights, bounce around ideas or resolve conflicts.
- 3 Consider how your board can standardize its operational processes in order to save time and mitigate burnout later in the year.

ACTIVITY

What will you do to facilitate a smooth transition for your chapter leadership?

(3-4 lines)



ACTION
WATCH VIDEO 3

LEVERAGING YOUR CHAPTER STAFF

While the various board members change each year, your chapter staff does not. This member of your team plays a central role in the success of your chapter. A strong working relationship with him or her will not only benefit your team, but also help your chapter staff feel supported and valued.

It is important to understand that as chapter president, you are the manager of your chapter staff. From their perspective it may feel as if they have multiple bosses and constantly shifting priorities, however. Find out what has, and has not, worked for your chapter staff in the past, and build on their deep knowledge of your chapter to avoid reinventing the wheel.

BEST PRACTICES

- 1 Organize a formal meeting in March with your chapter staff to discuss their feedback and expectations (along with your own).
- 2 Empower your chapter staff to facilitate the transition process between board members after GLC.
- 3 Look for opportunities in professional development for your chapter staff, which will benefit both them and your chapter.
- 4 Establish a check-in routine for the year.

ACTIVITY

What will you do to ensure your chapter staff is engaged and supported?



ACTION
WATCH VIDEO 4

YOUR RESOURCES

AREA DIRECTOR | Area directors are member leaders within the regional council whose primary role is to support a group of presidents within their respective area in the region. Each area director has previously served as a chapter president and has experienced many of the issues you will face. They are also excellent connection points to the rest of the region and can find support for your local initiatives within the regional council.

REGIONAL STAFF | In conjunction with your area director, you will also be supported by a regional staff professional who should serve as your primary contact point in the organization. In addition to providing updates on the various initiatives occurring within the organization, the regional staff professional is also an excellent resource for finding best practices and making connections between your chapter and the organization at-large.

OTHER CHAPTER PRESIDENTS | Starting in May, monthly president calls hosted by your area director and regional staff will begin. The primary objectives of these calls are to connect chapters, disseminate information and, most importantly, to allow presidents to experience share in a Forum-like environment. These are fantastic opportunities to connect with other motivated member leaders and see how other chapters manage over the course of the year.

PRESIDENTS' TRAINING SITE | Over the next several months, EO will continue to provide updates to the Presidents' Training Lifecycle microsite. This site will serve as the central platform for any resources you may need for your role. It will include on-demand training videos, supplemental resources on various topics (governance, strategy summits, etc.), and scheduling information for calls and events. EO will send notifications whenever the site is updated, but make sure to bookmark it in any case!

YOUR UPCOMING CHECKLIST JANUARY-MARCH

- View on-demand videos on the Presidents' Training Lifecycle microsite
- Attend February global president-elect call
(confirm the details of your call with your regional staff professional)
- Confirm board members for next year
- Attend regional (in-person or virtual) alignment meeting in March/April
(confirm the details of your regional event with your regional staff professional)
- Organize meetings with outgoing president
- Organize formal meeting with chapter staff

ENVISION

A **vision** is not just a picture of what could be; it is an appeal to our better selves, a call to **become something more.**

– Rosabeth Moss Kanter



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