

Annual Forum Strategic Plan

Moderator Plan Year: _____

Chapter Annual Theme: _____

Annual Forum Theme: _____

Monthly Calendar

2 - 4 Key Winning Moves in the year:

- _____
- _____
- _____
- _____

**Winning Moves are actions not goals. Examples: Each person presents 1 fully prepared Deep Dive presentation. 1 wow event per quarter. Each member attends at least 1 chapter event/qtr.*

Assign Meeting Responsibilities:

Mod elect: _____

Timekeeper: _____

Chapter Updates: _____

Secretary/Treasurer: _____

Gestalt: _____

Date Master: _____

Dinner Planner: _____

**Each member assigned at least 1 role*

**Assign other responsibilities (i.e., WOW Events, Spousal/Family event)*

Forum Retreat Roles:

Forum Exercises: _____

Dinners: _____

Transportation: _____

Lodging: _____

Wow Learning Event: _____

Wow Social Event: _____

**Every member of Forum assigned at least one role. Consider pairing.*

SMART Action Items:

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**Examples: Create communication starters, Setup interesting locations for forum, Attend mod quarterly dinners, Attend Mod Summit, Setup Forum Health Workshops, Setup Forum Next Level.*

Why do an Annual Forum Strategic Plan?

1. **Planning - eliminates the stress of being a moderator.**
2. **Nothing falls through the cracks. Everyone knows their responsibilities.**
3. **Increased engagement by all the members.**
4. **Reduce the work for the moderator.**
5. **Deliver a much higher-level forum experience. (Leadership is all about creating great change and those moderators who rise to the moment and lead others to the best they can be, will create great change in themselves.)**

Chapter Theme: Add chapter theme.

Annual Forum Theme: Put together a theme that is a personal passion of yours and one that can have an impact on your forum for the next 12 months.

Calendar: List key dates of events including wow events put on by members.

- Wow events are events that follow your annual theme and assigned to different members of your forum. List the dates and those responsible on the calendar. For more about wow events see below.
- Also add a date to start planning retreat, and actual month of retreat.
- If you are going to add a spousal event, consider setting that date as well.
- Lastly, consider adding key chapter events and the annual Nerve event. In larger chapters, it might be too difficult to list all the events. Focus on the ones you want your forum to attend.

Winning Moves: Winning moves are the actions you will take over the next 12 months as a moderator. They are not goals. Goals are outcomes. We want to identify the actions that will be taken by the forum. It's ok to tie these actions to goals if you like. Here are some examples:

- 1 fully prepared and coached presentation per person
- Meaningful engagement between meetings. Each member will meet another member each month.
- Everyone will be involved in the annual retreat planning.
- 4 Wow events per year
- 1 Spousal event

Assign Meeting Responsibilities: Apathy is the number 1 reason forums falter. It's important everyone participate in running the forum. A leader leads the members of the forum vs. manages them.

And guess what...its a heck of a lot less work when everyone participates. Consider the personalities in your group and assign based on those you think can do the best job here. Everyone has strengths and weaknesses. Assess them and assign appropriately.

Feel free to assign different roles that are not on the sheet including but not limited to: new member lead (someone who identifies and works to bring in prospects for interviews), Exercise chair (someone in charge of putting together exercises based on the moderators theme). The key is to do what works for your forum.

Lastly, don't be afraid to shake things up. What has been done in the past can be changed for the better.

Forum Retreat Roles: Retreats are the key events of the year. It's important to assign everyone a role for this event. But be sure to check on everyone to be sure they are delivering what they have committed to.

SMART Action Items: Smart means Specific, Measurable, Attainable, Relevant, and Timely. These are specific actions you as a moderator should consider taking during the year. It's ok to be fully transparent with your forum. Here are some of my favorites:

- Create custom communication starters based on your annual forum theme.
- Complete Annual Moderator plan by the first meeting date.
- Attend all moderator events including dinners and phone calls.
- Attend the moderator summit.
- Create a monthly schedule for forum member meetups.
- Complete and send agenda 1 week prior to meeting.
- Book meetings 3 months in advance.

Wow Events: For more advanced forums, consider adding wow events once per quarter. Wow events are events that follow your annual theme and are assigned to different members of your forum. **Be sure though to allow enough time to manage your presentations and updates.** Fully prepared presentations where you deep dive into issues is probably the most valuable part of forum. Our Wow events tend to add an extra hour or two to a meeting and do not replace the meeting itself.

There are 2 keys to a successful wow event: the content (usually connected to your annual theme), and the venue (change up the venue to make it more memorable). Some of the successful wow events my forum has done:

- Meet at a local company. We once met at NAP of the America's data center which included a full tour and use of their boardroom.
- Have a meeting at a sports stadium and talk to the Stadium manager and/or hall of famer.
- Meet at your sponsors office and get information on a particular topic (ie. Accountant/lawyer/bank etc.)
- Meet at a local charity and take a tour and learn about their mission.
- Meet at a local wellness center.
- Meet at a local incubator or innovation center like Alan Levan center, get a tour and talk with the manager.
- Meet at a comedy club and/or have a comedian come in to teach improv.
- Time a forum meeting where everyone can attend a chapter event of interest.
- Rent a Yacht large enough to host a forum meeting.

Share your Annual Strat Plan every time you send out an agenda so that nothing falls through the cracks. And if possible, work with another moderator to coach each other prior to your first meeting.