



Participation in
one roundtable is
INCLUDED in your
MMAC dues

For CEOs,
CFOs & Senior
Executives

Advisory
board of
your peers

News, programs
and events
focused on small
business



Executive Roundtable Guide

Over 300 CEOs, CFOs and Senior Executives of metro Milwaukee businesses count on Roundtable program to fill the “lonely at the top” void that often comes with the territory of being one of the senior decision makers of a small business.

The purpose of the Roundtables is to provide a structured and confidential environment for executives to give and receive the benefit of their experiences to help resolve business challenges. A Roundtable is not intended as a venue for casual social conversation; to serve as a platform for sales presentations; or to be an occasion for guest speakers. However, experts may be invited to speak if group members do not have relevant experience to address a specific business issue.

This exclusive program supports members primarily through monthly Roundtable discussion groups. Each Roundtable group is unique and consists of 8-12 peers with similar company sizes in non-competing businesses. Special events throughout the year provide additional networking, educational and promotional opportunities to all group members.

MMAC's ROUNDTABLE MANAGER

has resources and best practices to assist each group. **Let us help!**



Chauntele Kreutz

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After nearly 40 years, MMAC has a lot of expertise to keep the roundtable experience effective and valuable for all participants. Support is available to ALL roundtable members, not just group leaders.

ROUNDTABLE TOOLKIT

- Group "I Will" templates
- Strategic Plan Sharing Session
- Group Connection Exercises

ROUNDTABLE CONCIERGE SERVICES

- Find new group members
- Assist with in-group surveys
- Support scheduling and improved RSVPs
- Connect group to other MMAC resources
- Recommend topical content experts
- General best practice assistance

Recommended Meeting Format

ONE WORD OPENER

Each member says one word to describe their status

CONFIDENTIALITY REMINDER

Occasional reminder that everything shared stays in the room

3-5 MINUTE UPDATES

Updates do not involve ANY discussion. These are uninterrupted moments for each member to "update" the entire group.

Please come prepared – to present efficiently during your 3-5 minutes.

- Everyone provides best/worst issues professionally; and if they care to – personally.
- To help in parking lot placement; indicate those issues with a tight deadline and/or of significant importance.
- Include brief update to any resolutions our outcomes to past issues that were shared.

1. Urgent-Important
2. Important-Not Urgent
3. Urgent-Not Important
4. Not Urgent-Not Important

*During the 3–5-minute updates, leader should use parking lot to identify and prioritize issues for discussion. **Urgent/Important** issues come first.*

SELECTING ISSUES

Group leader facilitates process to prioritize issues discussed. A typical meeting will address 1-3 issues in depth. Group leader can also ask group to vote if there are multiple issues on the table.

PRESENTING ISSUES

Group member of the first selected issue gives additional brief details on the issue. This is also uninterrupted time.

Q&A

Members can ask the presenter clarifying questions, to better understand the issue.

BEST PRACTICE SHARING

Members share experiences related to this issue following Gestalt language protocol. No directive given. Empathize and share positive or negative experience. *Example: "Here is what I did in a similar situation..."*

HOUSEKEEPING

Time to review any potential new members; address schedule changes or other concerns or issues any of the members would like to discuss about the function of the roundtable.

The Virtual Roundtable "Option"

MMAC advises each roundtable group discuss how virtual attendance is affecting peer connections and discussions (positively or negatively).

Policies should be clear and added to your "I Will" attendance policy. *Example: Virtual attendance is allowed for circumstances when in-person cannot be achieved.*

If virtual option is permitted, host locations should be in an environment that is conducive to a successful virtual call-in option.

MMAC does not endorse a wholly virtual roundtable experience.

Discussion Protocol

Members speak from experience rather than give advice. Giving advice or telling someone what to do is a matter of opinion. By sharing experiences, members end up with information that allows for better decision making. Adapted from Gestalt psychology, the use of the discussion protocol is a key component in creating a safe environment where members will feel comfortable sharing knowledge and expertise.

- Use the past tense
- Empathize
- Ask questions that prevent defensiveness
- Share positive and negative experiences
- Listen well

Confidentiality

For a Roundtable to be successful, members must share open and honestly. To enable this level of communication, members are required to maintain complete confidentiality. Nothing discussed in a Roundtable ever leaves the room.

This includes sharing information with partners, co-owners, spouses or significant others. A breach of confidentiality will result in removal from the group and adversely affect future eligibility for the Roundtable program.

The Roundtable Experience

Each Roundtable member is responsible for his/her own experience and must take equal voice in ensuring the group's success.

Be proactive

Take the lead in risking and sharing deep personal experiences. Trust is contagious and soon everyone else will follow.

Share your concerns immediately

If anything in the Roundtable bothers you and you do not discuss it, you do yourself and the group a disservice. An example might be that a member repeatedly fails to arrive on time. Make sure that you criticize the behavior, not the person. It is likely that someone else in the group has the same feelings. Raising concerns before they become too serious can prevent their escalation.

Developing a Group Purpose

Each Roundtable group agrees on a structure and level of formality that best meets the needs of all members. MMAC suggests each Roundtable develop and document its own "I will" document detailing how their group will operate and resolve issues.

- Group Purpose Statement
- Attendance Policy
- Discussion Protocol
- Confidentiality
- Non-Compete
- Majority Rule

Contact **Chauntele Kreutz** to assist in a Group purpose and "I Will" document.

Role of Group Leader

It should be remembered that the volunteer leader for each group is also a participant. Leaders can expect to:

- Serve as a point of contact between the group and the Roundtable Manager.
- Help their group stay on target with meeting format, keeping discussions efficient, equal and in depth.
- Manage housekeeping issues like reviewing prospective new members; discussing adjustments to meeting schedule; addressing needs to update group purpose or "I Will" agreement.

MMAC recommends group rotate leadership every 12-18 months. Rotating leadership is essential to instill ownership of the group experience with all participants.

While one group leader is serving their volunteer term, the next leader should already be identified. He/she should stand in when the group leader cannot make the meeting.

Group Leaders receive occasional special invitations from the Roundtable Manager, including the opportunity to participate in bi-annual Roundtable Leader Meetings. These sessions blend timely updates on MMAC policies and initiatives with the opportunity to learn and hear from other roundtable leaders – a best practice sharing platform on roundtable function.

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we are committed to increasing
the economic vitality of the metro
Milwaukee business community.

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