

Four-Step Forum Exploration FAQs

Since its inception in 1975, forum has become a safe haven for members to discuss important and emotionally charged business, personal and family concerns. Forum is the most highly valued YPO member benefit. And, in the past 40 years, we have seen incremental leaps in the development of forum education and the meeting model, most notably in the last 10 years with the [Transformational Forum™](#) retreat.

Now, in 2014, we are leaping forward with the **Four-Step Forum Exploration**. Beginning 1 July, forums will have an opportunity to take advantage of this new presentation process — which retains all of the best parts of the traditional presentation model, while adding opportunity for greater return on the forum experience.

What is the Four-Step Forum Exploration?

The Four-Step Forum Exploration is the most important innovation in forum methodology in the past 20 years, and is a featured component of the revised **Forum Fundamentals** and new **Forum Moderator & Leadership Development** (FMLD, replacing FMD) workshops.* The Forum Exploration is a new presentation model that introduces the element of self-curiosity and focuses on creating shared value for all forum members. [See how the process works.](#)

How does the Four-Step Forum Exploration differ from the traditional presentation model?

The Forum Exploration is based on the three pillars of emotion, self-curiosity and vulnerability, and focuses on mutual self-discovery. Differences from the traditional process include:

- De-emphasis on the Q&A portion of presentations. Clarifying questions may still be asked but must follow forum protocol.
- Coaching is not a necessary component of the new model because it can lead to problem-solving, instead of opening up the possibilities of self-discovery.

Our presentation process works well. Why is the international Forum Committee introducing this new presentation model?

An effective presentation process that is working well is a sign of a healthy forum. However, some forums are looking for the opportunity to get more out of their presentation process. The Four-Step Forum Exploration challenges forum members to share meaningful updates and surface relevant and important issues. The Exploration is recommended for all forums, regardless of type or meeting frequency.

The Forum Committee is confident that the addition of the self-curiosity principle will increase YPO-WPO members' forum take-home value. As a result, the Forum Exploration process will be what is taught in the Forum Fundamentals and Forum Moderator & Leadership Development workshops.

* FMLD has been redesigned as a highly experiential one-day program that develops the core competencies for effective leadership, such as active listening and conflict resolution.

What if a newly trained forum member joins our forum and we're using the traditional presentation model?

Welcoming a new forum member is an opportunity for forum renewal. In this spirit, adding a new member is a great opportunity to implement the Four-Step Forum Exploration. Forum Fundamentals workshop attendees will be educated in forum protocol, confidentiality and the commitment required for forum participation – the key success principles of forum and the foundation of YPO. In addition, they will be introduced to the Forum Exploration and the difference between it and the traditional presentation model.

How does the Four-Step Forum Exploration translate to business issues?

Business decisions inherently come with emotions: mergers create anxiety; selling the family business may create a complex mix of emotions, ranging from sadness to relief. The Forum Exploration connects the emotion and analysis of significant business challenges and allows all forum members to engage through self-curiosity. Once everyone has experienced self-curiosity, the forum will check in with the presenter to determine if his or her needs were met. This way, the presenter still owns the presentation and is fully supported by his or her forum mates.

How can forums learn about the Four-Step Forum Exploration process?

- *For Forum Officers/Spouse Forum Officers:* Host a Forum Moderator & Leadership Development in your chapter. Though FMLD was designed with the moderator in mind, the focus on leadership creates take-home value for any member who has been through Forum Fundamentals, and has been in a forum for at least a year. Encourage multiple members from the same forum to attend, or even better, entire forums can go through the workshop together. WPO Forum Officers launching new forums can host a [WPO Forum JumpStart](#).
- *For Moderators:* Include the Four-Step Forum Exploration in your annual forum retreat or biannual mini retreat. The model may be featured in other forum experiences such as [Forum SuperCharge](#). Schedule a [Transformational Forum](#) retreat as it includes the Forum Exploration and offers additional skills and bonding exercises that will bring a greater level of understanding and connection among your forum mates.**
- As a forum, review this information sheet and [infographic](#).

***When bringing the Four-Step Forum Exploration to your forum for the first time, the Forum Committee recommends that you invite a certified forum facilitator to facilitate your first session and ensure that your group understands the full process.*

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