

## Purpose

Monthly Update forms are used at the beginning of the meeting to gain alignment among the group. Each person shares an update of what has happened since the last time the Forum met. The form is a tool to provide structure to the updates whereby specific highlights and significant events are covered. Note that each Forum can choose which Monthly Update form they want to use, or they can create their own. Form selection is changed periodically.



## When to Use

The Monthly Update form should be completed in advance of the Forum meeting, preferably one or two days in advance. This gives the person ample time to thoughtfully reflect on the entire month, rather than frantically writing down what is front of mind at the last minute. In some Forums, completing the form in advance is mandatory and failure to do so may result in a fine.

During the meeting, the updates are shared at the beginning of the Forum meeting, usually after a brief welcome, confidentiality reminder and ice breaker exercise. Members are encouraged to listen intently during each person's update. Over time, the updates become a living journal of each person's life. They help us to know and understand each other better, thereby increasing the bond between members and the overall value of the Forum experience. They also provide an opportunity for members to pause and think introspectively about significant events, which can inspire deeper, more strategic thinking.

## How to Use

The Forum typically goes in a circle, and each person shares their update using the Monthly Update form as a guide. In most Forums, monthly updates are timed, usually 3 to 7 minutes depending on the size of the Forum and the length of the meeting. There are no interruptions while the person shares their update. In some Forums, a short Q&A is allowed after each person's update (usually 1 minute).

## Form Fields

This Monthly Update form is intended to focus on matters of most significance and speak about them in depth. It is a stark contrast to update forms that gather a higher quantity of events. Updates tend to be more meaningful and substantive in this format. Ask people to share their three events in order of importance, with the most important event first. This helps the Forum understand what is most important, and it helps with time management. If someone runs out of time, they've already covered the most important things.

- Snapshot Ratings – To provide a quick, numeric picture of how you are feeling in various aspects of your life, give yourself a rating between 1 (low) and 10 (high) on each of the four aspects: Business, Family, Personal/Self and Forum.
- Last 30 days – Identify the three most significant events that have happened in the last 30 days. Events can be issues, challenges, successes, breakthroughs, etc. These can be in any category. Just focus on what is most important to you.
  - Brief Description – Write a few words about each of the events.
  - Significance, Impact – Make note of how each event was significant to you and what its impact is on you, both short term and long term.
  - Emotions – For each of the events, identify how you feel when you think about it. What emotions do you experience? This field is an attempt at uncovering the EQ (Emotional Quotient) component around the event. At a minimum, write down three words that describe your feelings. For example, frustrated, helpless, betrayed, skeptical, frightened, hopeful, relieved, etc.
- Next Steps, Actions – Consider if there are any next steps or actions related to each of the events.
- Previous Presentation Update – If you have presented an issue to the Forum that has experienced change, provide a brief update on what has happened.
- Most Looking Forward to Next Month – Share what you are most looking forward to in the next month.