VISTAGE

RITUALS50 CHECKLIST & WORKSHEET

Through RITUALS we build families and communities, we navigate change and mark important events, we celebrate and commiserate, and we develop our identity. Each ritual we follow in our Vistage Group is meant to solidify us as a group each month AND as a model for how you can build your own culture of effective and meaningful meetings in your own organization. That being said, except for the inclusion exercise you can order them in any way that makes sense to you. Every leader has their own style. Executive brevity and keeping to an agenda* are important executive skills and the goal is to complete the checklist in about 50 minutes. (each activity time is a suggestion)

* To allow the meeting to flow more seamlessly from one activity to the next without sacrificing depth, facilitate in a way that allows for deeper discussion to move to the parking lot. Intervene with something like "Bob, can we explore that more deeply? Can you do a 3./5/10 minute summary for us when we get to the Parking Lot right after we finish the rituals?

15min ☐ **Inclusion Exercise**

WHO: HOST --PURPOSE: To reacquaint, warm-up and form deeper personal connection between members of the group. To get to know each other on a more personal level.

Host Inclusion question/activity:

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2 min ☐ **Core Values**

WHO: HOST -- PURPOSE: To name our core values and remind members of the behaviors that show that value so that the group shows up as their best-selves. Assign a core value and have member tell quick example of that behavior.

Core Values question/activity:

BUSINESS: 8
PERSONAL: 7
HEALTH: 5

7 min ☐ **Dashboard /Monthly Summary**

WHO: HOST -- PURPOSE: To build group unity and call out attention to any outliers - successes or challenges (celebrate the highs, offer help for lows). If necessary move to Parking Lot or Issue Processing.

Host saw these Monthly Summary Highlights

5+min ☐ **Memory Jogger**

WHO: MEMORY JOGGER runs discussion, HOST facilitates. -- PURPOSE: To review past issues. Dive deep, hold group accountable, keep on task and, if necessary move to Parking Lot or Issue Processing.

Memory Jogger Role is ...

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2 min ☐ **Vistage Validation**

WHO: HOST -- PURPOSE: To improve our ability to share and express gratitude. Invite group to share stories that validate membership, show ROI and serve as examples of core values. Invite members to express gratitude for anyone in the group.

Host's Vistage Validation example:

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2 min ☐ **Spirit of Sharing**

WHO: HOST runs discussion, LIBRARIAN records in SUMMARY -- PURPOSE: Invite group to share websites, books, apps, events, TV shows, movies, etc. that might be of interest to the group and Librarian Role notes them in summary page.
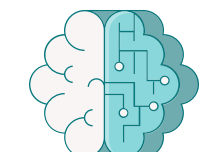
Host's Share:

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5 min ☐ **Best Practices**

WHO: HOST -- PURPOSE: Solicit questions or give examples regarding practices that have proven to work well and produce results, and therefore recommended as a model. Keep group on task, if lengthy questions/answers move to Parking Lot or Issue Processing.

Host's Best Practice Share or Question:

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10 min ☐ **brAInstorming**

WHO: HOST -- PURPOSE: Start discussion or solicit/give examples regarding Artificial Intelligence practices that have proven to work well and produce results. Keep group on task, if lengthy questions/answers move to Parking Lot or Issue Processing.

Host's AI Share or Question:

<1 min ☐ **Attendance Accountability**

WHO: HOST -- PURPOSE: Clearly state who is absent from the meeting, who needs to leave early, etc. so that a schedule for the meeting can be set and all are held accountable.

Host's Notes:

☐ **Plus/Delta**

WHO: CHAIR -- PURPOSE: In the spirit of continuing improvement, invite group to critique today's facilitation including inclusion, pace, voice, physicality, etc.

Host's Action Items:

☐ **Parking Lot**

WHO: PARKING LOT names issues, CHAIR facilitates -- PURPOSE: To take an agenda-appropriate amount of time to dive in-depth into issues that were not adequately discussed within the rituals.

Parking Lot Items: