Forum Mini Retreat

Selected Exercises

November 2026

4 core exercises plus 3 guided discussions

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Suggested timings assume eight participants and include instructions, reflection and discussion.

Facilitated by

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Forum Deepening

EXERCISE 1

Stepping In

Type	Icebreaker
Time	20 minutes
Objective	A non-verbal disclosure of different icebreaker questions or statements to get to know where people stand on different topics
Outcome	Trigger alignment conversations based on what people stepped in for or not

Step-by-step instructions

1. Have everyone stand in a line or a circle.
2. Explain to the group that you will read one statement at a time. And if they feel they agree with that statement, they STEP IN.
3. Read statements one by one, and allow people to step in and out before you read the next one. Allow time for people to observe who stepped in and who didn't.
4. Make a note of those statements where ALL stepped in or NO ONE stepped in.
5. Choose the questions or statements you want to ask in advance to limit the time as needed.

Instructions for participants:

- I will read a statement, and if you agree, then STEP IN.
- Note who else stepped in or didn't.
- Note in what area you were hesitant to reveal the truth to the group, or perhaps were not willing to reveal to the group.

Debrief:

- Allow the group to debrief for as long as they need to so they can clarify and have the conversations they need to have.
- Give time at the end for them to reveal their truth.
- Review how they found this exercise to be. Were they surprised by anything? Did they learn anything new?

Set-up questions

- I am skeptical about giving up “real work” days to be here.
- I have concerns about being fully transparent at this retreat.
- I am losing faith in my business.
- I believe my work/life balance has had a negative impact on my family.
- I wear too many hats at work.
- I have lost the passion for my business and am finding it difficult to stay motivated.
- My relationship with my spouse is currently strained.
- I feel overextended.
- I am dealing with, or have dealt with, a very draining legal battle.
- I am proud of my current physical status.

Group dynamics

- I can share anything with this group.
- We have effective presentations.
- I have an issue with the direction of the Forum.
- I am concerned that not all members are in the same place financially or professionally.
- The amount of time the group spends together outside of Forum works for me.
- I believe that some members hold back important and relevant information.
- The strength and effectiveness of this Forum works for me.
- I have an issue with specific individuals in the Forum.
- I wish others in the group were as committed as I am.
- I prefer the Forum to be more relaxed and less rigid.
- My Forum members are really the only people that I open up to about personal things.
- Punctuality and preparedness have been an issue in our Forum.
- Fine implementation has worked well.
- I believe we should spend less time on business issues and more on personal issues.
- I think our meetings are too casual and people joke around too much.
- I am not clear on the true value of EO.
- I am overwhelmed by guilt when I have to ask for a change in the meeting time or date.
- The meeting agenda and timing work for me.
- I feel that other members take advantage by asking for professional advice.

Business

- My current business can likely produce dependable cash flow for a lifetime.
- I work with a business coach.
- I have a succession plan for my business.
- My business partner is a nightmare.
- There is a dynamic within my business that is keeping me up at night.
- I frequently work from home.
- My business situation is terrible.
- In my business, I'd rather be a manager than a practitioner.
- I am going through, or have been through, a business failure.
- My employees are happy and feel successful.
- I have an employee in an important role who is draining energy from our team.
- I am trying to build a broken business model.
- The roles I play within my business are my passion.
- I am very clear about where I think my company should go.
- Doing business with family members has negatively impacted personal relationships.
- I am butting heads with a partner/owner/board member, or someone on my executive team.
- I am good at expressing appreciation in my organization.
- I would like to focus more on my business strategy, rather than operations.
- I prefer to be the sole leader and decision maker.

Personal

- Besides being with my kids, I don't know what makes me genuinely happy.
- I know my children are happy with me as a parent.
- I have risked and lost money belonging to people close to me.
- I am always overcommitted and have issues with time management.
- I have streams of income coming from more than one business.
- I am disorganized.
- A close friend's divorce has profoundly affected my family dynamic.
- My spouse and I frequently fight.
- My parents set a great example for me.
- I still seek the approval of my parents.
- Most people who know me well would consider me dependable.

EXERCISE 2

Forum Value Triangle

Type	Forum meeting tools
Suggested time	45 minutes
Objective	To find out where members find value in their Forum experience
Outcome	What, how and where does the GROUP want to create more value for each other, and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions and topics that would create more of what the group wants.

Where do we find value from our Forum experience?

- Give each member a copy of the Triangle found on the next page, the one with just the triangle in the centre.
- Read the descriptions on the next page out loud to the group. For each of the "points" of the triangle, encourage a short discussion in your group of what those corners could mean in your Forum. It is helpful if there is shared understanding of the three "axis" points.
- Ask each member of the Forum to put a dot in the approximate spot that would represent the current value they receive from Forum, approximating the distance from each corner as representing where the value they have recently been getting from Forum sits. Make the size of the dot represent how much of this value they have been receiving. Don't compare with each other —mark your dot on your sheet.
- Then, ask them to draw a line from their dot to where they would like to shift toward on the value triangle based on their current trajectory in life. Then connect those dots as an arrow (with the arrowhead on the end pointing to their ideal ratio of value).
- Then put a flip chart up with the triangle drawn in the centre, and the corners marked exactly as on their sheets. Ask each Forum mate to bring their sheet to the front and copy exactly what they drew on their sheet onto the big flip chart, with their dots and arrows. They can put their initials on their arrow if they would like. Different coloured markers are helpful if there are tight groupings or crossing lines.
- Allow time for the group to ponder the drawing you have created. Then, lead a group discussion: What does the group see? What do they notice? What is surprising? What did they already "know"? What is their interpretation of what the groupings or directions of the arrows mean? You can do this "popcorn" style or by making space for each member to speak.
- A group member that is an "outlier" or wants less of some value may have good resources outside of the Forum – and thus is not "opposed" to more of "that," but rather isn't specifically looking for it inside the Forum.
- What, how and where does the group want to create more value for each other – and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions, topics that would create more of what the group wants.
- You, as Moderator, can hopefully gain group agreement as to some specific changes for upcoming Forum meetings – perhaps for the next year.

Value triangle corners

Connection:

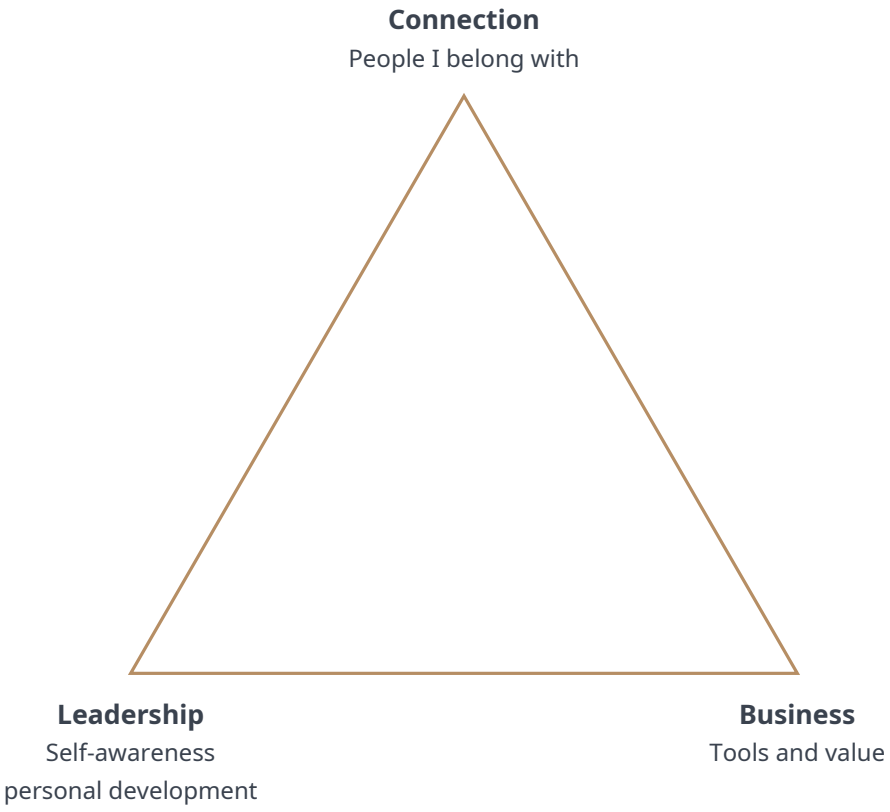
We “belong” in this group – they are our tribe; we enjoy each other’s company and we understand each other. Connection activities can be inside a Forum meeting or between meetings – enjoying meals together, activities, spending time with families (spouses and/or children), sharing stories of our fun activities and doing activities together. We love hanging out and sharing with each other.

Business tactics and tools:

Take back and implement in my business: tools, strategies, processes, agreements and other “plug and play” info that I can use in my business, and use to make improvements in the near term. I connect with trusted experts, learn about other industries and am introduced to people, tools, software, processes, systems and manuals that I can adapt and use. We are efficient and effective within our Forum. We go deep sometimes, if we need to.

Leadership self-awareness/Personal development:

I want to see myself more clearly; see into my blind window and view what I don’t realize about myself, such as my impact and relationships with others. Developing into a more mature and effective leader is a journey, and those who are engaged and intimate with me – but not attached to my outcomes or the stories – can offer a lot of useful information. Our Forum is focused on the 5% … we are very vulnerable and authentic.



EXERCISE 3

Forum360 Review

Type	Forum reflection
Suggested time	60 minutes; review results beforehand.
Objective	Review personal and forum feedback and identify opportunities to improve.
Outcome	A shared understanding of the feedback and agreement on the changes the forum is prepared to make.

Step-by-step instructions

Review the Forum360 results together, beginning with personal reflections and then discussing the forum as a whole. Protect the anonymity of the feedback throughout the conversation.

Personal reflection

- Did anything in your personal feedback surprise you?
- Did the feedback feel fair and reasonable?
- Do you have any questions about the feedback that can be discussed without asking anyone to reveal who provided it?

Forum reflection

- Did anything in the forum feedback surprise you?
- What changes could we make to help the forum move forward?
- Are we prepared to commit to these changes, or are they not important enough for us to pursue?

Close

Summarize the changes the group agrees to make. Follow this review with Pick Me Up.

EXERCISE 4

Pick Me Up

Type	Connection
Time	45 minutes
Objective	Provide an opportunity for Forum members to express how much they appreciate each other.
Outcome	Each Forum member keeps a personal audio recording they can return to as a pick-me-up.

Description of the exercise

One by one, each member leaves the room and remains out of hearing range while the rest of the group records a positive, grateful and uplifting conversation about them. After all recordings are complete, everyone listens privately to their own recording on headphones at the same time and keeps the recording afterward.

Step-by-step instructions

1. Have the group sit close together around a table so the microphone can pick up everyone's voice.
2. Set up an iPhone or another device that can record audio conversations. Check that every member has headphones and a device on which they can receive and play their recording.
3. Ask one member to leave the room and remain out of hearing range for the entire recording about them.
4. Set a timer for three minutes for the group's recording about that member, then start recording.
5. Invite the remaining members to talk about how they appreciate the person, what they have learned from them and how they are inspired by them. Keep all comments positive, grateful, thankful and uplifting.
6. When time is up, stop and save the recording with the member's name. Invite the member back into the room.
7. Repeat the process until every member has a recording. Wait until all recordings are complete before distributing any of them.

Listening together

8. Give everyone their own recording at the same time. Ask them to wait before pressing play.
9. Have everyone put on headphones and begin listening to their own recording together. Allow everyone to finish listening privately before starting the debrief.
10. Remind members that the recording is theirs to keep and revisit whenever they want a pick-me-up.

Debrief questions

1. What was it like listening privately to the group's recording about you?
2. What emotions did this bring up for you?
3. Do you have a different perspective on how others see you, relative to how you see yourself?

Growthy Sharing

EXERCISE 5

Forum Blitz Learning Round

Type	Shared learning
Time	45 minutes for approximately five prompts; allow additional time for instructions and transitions.
Objective	Exchange practical experiences, habits and approaches to everyday life.
Outcome	Learn from one another’s routines and perspectives.

Step-by-step instructions

Use the prompts on the following page as a menu. Select approximately five prompts for this round; you do not need to cover every prompt.

1. Read the selected prompt aloud.
2. Give everyone one minute to think.
3. Go around the group, allowing one minute per person to respond.
4. Repeat for the remaining selected prompts.

With eight participants, each prompt takes approximately nine minutes: one minute of thinking time plus eight minutes of sharing. Five prompts use approximately 45 minutes, before instructions and transitions.

Prompt menu

- What are your reading habits and processes nowadays? How have they evolved and drifted over the past five years?
- What is your process for quickly note-taking when an idea hits you? Do you use Siri/reminders, or something else? What tools do you use to stay organized?
- Do you keep a to do list? Or is that for younger people?
- How has your relationship with your phone changed over time? Are you happy with your level of reliance on it? Are there any phone addictions you wish to kick?
- What do you do with the first 30 minutes of your day, and is it by design or by default?
- What's your sleep setup, literally: time in bed, what's in the room, what you do when it's not working?
- Do you use any guiding principles for when a trip is worth taking versus doing it on a call?
- How do you end your workday, and how do you know it's over?
- How does your family coordinate logistics? Shared calendar, group chat, one person who holds it all?
- One of your favorite non-fiction books that have impacted your life, and why?

Harder

- What's a decision you made quickly that you'd now spend much longer on, and one you agonized over that you'd now make in five minutes?
- How would you define a good day? How would you define a good week?

EXERCISE 6

Aging Parents

Type	Meeting tools
Suggested time	60 minutes; select discussion questions rather than cover every one.
Objective	Explore our experiences, responsibilities and challenges with aging parents.

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a “deep dive”. Unlike a specific issue that one member needs to explore, multiple members have “skin” in topics. Sometimes they emerge during the group’s 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

Step-by-step instructions

Communication starter: Have each member fill in the blank for the following statement.

My greatest fear about aging is _____.

Background: Go around and have the members provide a brief overview of their parents’ current circumstances.

Guided discussion questions:

1. What are our responsibilities to our aging parents? Regarding their:
   a. Financial needs?

   b. Physical needs?

   c. Emotional needs?

   d. Spiritual needs?

2. When you see a need that your parents won't let you fulfil, do you accept it or force your way in? If you step in, how do you do that?
   a. How do you negotiate a lifestyle change with your parent?

   b. How do you handle the role reversal?

   c. How do you manage aging parents' care long-distance?

   d. How do you manage sibling relationships?

3. What are you teaching your children?

4. Are your affairs in order?

Close: Read The Wooden Bowl (on next page).

THE WOODEN BOWL

A frail, old man went to live with his son, daughter-in-law and four-year-old grandson. The old man's hands trembled, his eyesight was blurred, and his steps faltered.

The family ate together at the table. But the elderly grandfather's shaky hands and failing sight made eating difficult. Peas rolled off his spoon onto the floor. When he grasped the glass, milk spilled on the tablecloth.

The son and daughter-in-law became irritated with the mess. "We must do something about Grandfather," said the son. "I've had enough of his spilled milk, noisy eating and food on the floor."

So, the husband and wife set a small table in the corner. There, Grandfather ate alone while the rest of the family enjoyed dinner. Since Grandfather had broken a dish or two, his food was served in a wooden bowl.

When the family glanced in Grandfather's direction, sometimes he had a tear in his eye as he sat alone. Still, the only words the couple had for him were sharp admonitions when he dropped a fork or spilled food.

The child watched it all in silence. One evening before supper, the father noticed his son playing with wood scraps on the floor. He asked the child sweetly, "What are you making?" Just as sweetly, the boy responded, "Oh, I am making a little bowl for you and Mama to eat your food in when I grow up." The child smiled and went back to work.

The words so struck the parents that they were speechless. Then tears started to stream down their cheeks. Though no word was spoken, both knew what must be done.

That evening, the husband took Grandfather's hand and gently led him back to the family table. For the remainder of his days, he ate every meal with the family. And for some reason, neither husband nor wife seemed to care any longer when a fork was dropped, milk spilled or the tablecloth soiled.

EXERCISE 7

Raising Children with Values

Suggested time	45 minutes

Step-by-step instructions

Communication starter: The one thing I want most for my children is:

Guided discussion questions:

1. What are your five most important values?
   a.
   b.
   c.
   d.
   e.
2. How do you communicate your values to your children?
3. How do you deal with situations where your children fail to honour your values?
4. Would your children describe you as someone who “walks the talk”?

Close: With a word of caution:

Be careful

Be careful of your thoughts for your thoughts become your words. Be careful of your words for your words become your actions. Be careful of your actions for your actions become your habits. Be careful of your habits for your habits become your character. Be careful of your character for your character becomes your destiny.

Appendix: Vulnerable Reflection

EXERCISE A1

Decision Worksheet

Type	Self-reflection
Suggested time	40–60 minutes; private writing followed by sharing one decision or insight each.
Objective	To become more aware of your own decision-making process
Outcome	To help you analyze: • Decisions made • Choices available • Values considered • Learning

Step-by-step instructions

Ask yourself the following questions, and write down your answers to review and contemplate:

1. In your life, what is the most difficult decision you have made related to:
    a. Business/work/career b. Family c. Personally
        i. What made it so difficult?
        ii. Explain
    d. To what extent were these decisions not only difficult, but also painful? If one of them was painful for you, rate it on a scale of 1 (low) to 10 (high).
2. In your life, what is the best decision you have made related to:
    a. Business/work/career b. Family c. Personally
        i. Describe it
        ii. What were/are the outcomes that resulted?
        iii. If anything, what did you learn?
3. In your life, what is the worst decision you have made related to:
    a. Business/work/career b. Family c. Personally
        i. What happened?
        ii. Any lessons learned?
4. What major decisions are you most looking forward to making in the future?
    a. Business/work/career b. Family c. Personally
5. What decisions are you most dreading in the future that you know you will face?
    a. Business/work/career b. Family c. Personally
6. What do you believe your life will be like in 2031?
    a. Business/work/career b. Family c. Personally

EXERCISE A2

Life Assessment

Suggested time	45–60 minutes; participants share selected highlights.

Step-by-step instructions

The Life Assessment questions on the following page are designed to gather your perceptions of your life experience so far. They ask you to rate a number of significant variables that are linked to your overall level of life satisfaction and happiness.

On each item, using a 1 – 10 scale (1 being low and 10 being high), rate how you see it right now. Perhaps 10 years ago you would have responded differently or maybe you will see it differently at some future time. Be as honest as you can be. You are doing this for you and no one else, including your Forum members. If you rate an item a "10," you won't have to defend it, nor will you have to defend an item rated a "1." No one will be allowed to try to talk you out of a number. Each of you will be asked to share your responses.

One last thing: some of you may be extremely analytical and may find it hard to come up with a justification for putting down one number. Just go with your gut feeling. No scientific explanation or back-up information is required.

Instructions for Moderator

On a flip chart, draw a grid with one row for each of the 20 assessment questions and one column for each member. Record each member's 1–10 ratings in the grid. Ask members to choose up to three areas they rated low as areas to focus on in the next 6-12 months. Members may want to reach out to other members who scored highly in those areas for assistance and support. Commit to a specific time to revisit the survey to discuss and chart improvements.

Life Assessment Questions

1. Finding meaningful and fulfilling work?
2. Finding a suitable spouse/partner?
3. Building a successful relationship with your spouse/partner?
4. Raising your children?
5. Building and/or maintaining a close relationship with your parents?
6. Building and/or maintaining a close relationship with your siblings?
7. Developing close friendships?
8. Stewarding your financial resources?
9. Living up to your intellectual potential?
10. Nurturing your spiritual potential?
11. Dealing with your fears?
12. Finding wisdom?
13. Taking care of your physical health?
14. Taking care of your emotional health?
15. Being of service to others?
16. Being at one with yourself?
17. Accepting your limitations?
18. Coming to terms with aging and your own mortality?
19. Everyone at birth is “dealt a hand,” so to speak. Rate the quality of the “hand” you were dealt.
20. Overall, rate yourself on how well you believe you have played the game of life, given the hand you were dealt.

EXERCISE A3

Life’s Walk

Suggested time	90–105 minutes; allow eight minutes per person.

Step-by-step instructions

In a Life Walk a small-group member is asked, literally, to walk his or her life, sharing experiences at different ages — past, present and future. Ideally, the chairs in the meeting area are arranged in a circle, with rectangles of cardboard, vinyl or wood laid out on the floor. The numbers on the rectangular steps represent ages in a person’s life, from birth to age 80, with another (optional) step representing life after death.

The walker stands on each panel and speaks, in the present tense, about what is happening at that stage in his or her life. During the walk, an example statement from childhood might be, “I am 7 years old, and Mom just came into my room to say that she and Dad are getting a divorce. I am feeling …”

The walker prepares for his or her walk by thinking about the key periods and transitional events in his or her life. Five minutes is sufficient preparation. Notes are not used during the walk. The events that are meant to be spoken will surface at the appropriate age — the participant will know what to say.

How to introduce the Life Walk to your small group

“The Life Walk is a timed exercise that gives you the opportunity to share important events or transitional times from birth up to [specify an ending time]. A series of tiles are laid out on the floor representing ages of your life. Since the tiles are only shown in five-year increments, you stand somewhere between them to represent ages that are not shown.

“Each of you will be given __ minutes (e.g., 8) to walk your life from birth to ___. There is no “right way” to do this. Nor is it required that you finish. Some people will only relive events for the first 15-20 years of their life in the __-minute period. Others finish a __-year Life Walk in less than five minutes.

“We’ll give each of you a few minutes to sit quietly, listen to the music and perhaps compose your thoughts of what you might say. However, you won’t use any notes during your walk. From our experience, as you stand on the different tiles, ‘file folders’ in your mind will open up on key events … which you will then relive during the walk.

“As you walk your life, we ask you to describe events or relationships in the first person, present tense. For example, (this is where the facilitator needs to stand up on the tiles and demonstrate):

- I am 8 years old. Mom and Dad ask me to come and see them in the living room. They are telling me that they are getting divorced and I will be living half-time with Dad and half-time with Mom. I am scared and confused and I don’t know what to make of this.
- I am 15 years old and president of the student body. I am living a double life; during the day I am a “model student.” But at night I am a juvenile delinquent hanging out with kids from the south side of town. We make Molotov cocktails and throw them at cars. Somehow I am lucky; all of my friends get caught, but I always manage to sneak away.
- I am 23 years old and on a blind date that my roommate set up. My date is the most beautiful girl I have ever seen. We date for four months, then she breaks it off and I am devastated. I don’t know what to make of it until my friend tells me she is turned off by my use of drugs. I go cold turkey off marijuana and seek her out for a second chance. We are married five months later.

“There is no particular order to the Life Walk … whenever you’re ready, step up behind the birth year, compose your thoughts, and begin your walk. We will begin timing when you begin speaking. Also, if you should encounter a particularly emotional time during your walk, it is perfectly all right to just stand at that time and relive the moment. Our commitment as a group is to honour you as you relive key moments in your life.

“OK, the walk is open.”

EXERCISE A4

The Angel Walk

Type	Connection
Time	20 to 30 minutes
Objective	To create an environment of deeper sharing and connection
Outcome	A deeper connection to Forum mates

The Angel Walk – Originator – Philip Kristianson, The Forum Whisperer (phil@theforumwhisperer.com)

Description of the exercise

As children, we are taught not to pry, to be polite and to reply cordially when someone says, “How are you?” The typical response would be, “I’m fine, thank you.” We often don’t get to know the people around us as well as we could—and even those closest to us.

Social norms are hard to break, but there are some simple ways to create an environment for deeper sharing. One way is through role playing. The exercise below is designed to help you get to know someone you care about. It was introduced to me as “The Foetus and the Guardian Angel,” which describes it well but doesn’t inspire people to give it a try.

By adding a walk into this process, we can get some fresh air and a little exercise while talking to someone. This activity is called The Angel Walk.

Step-by-step instructions

1. Pick a partner. This should be someone you trust and want to get to know better.
2. Decide how long you want to walk. Typically, the walk will last about 20-30 minutes. You will walk away from the starting point for half the allotted time, and then walk back to the starting point.
3. Decide which person will assume the role of Guardian Angel and which person is the Foetus for the first half of the walk.

Instructions for each role

The Foetus is curious about what their life's journey is all about and can ask any question of the Guardian Angel as long as it is phrased in the first person. For example, "Guardian Angel, will I have any brothers and sisters?" or "Guardian Angel, will I be born into wealth or poverty?"

The role of the Guardian Angel will be all-knowing, answering various questions posed by the Foetus in the second person. For example, "You will have three brothers and one sister," or "You will be born into great wealth. But you will also experience poverty from age six to 10 when your father's business fails after he is betrayed by his business partner."

Note: All answers given by the Guardian Angel, even though they are in the second person, are actually about themselves.

Begin your walk with person A in the role of Foetus, and person B in the role of Guardian Angel. When you have walked for half the allotted time, switch roles so person A is the Guardian Angel and person B is the Foetus. You then walk around and then walk back to the starting point.

EXERCISE A5

What Are Your Fears?

Type	Self-reflection
Time	3 minutes per person
Objective	Share one fear that you have in each category: family, relationships, running your business or other
Outcome	Sharing vulnerability and identifying common frames of reference

Description of the exercise

Each person identifies one fear that they have related to each of the following categories: family, relationships, running their business or other.

Step-by-step instructions

Go around the table and take turns sharing.

EXERCISE A6

Tombstone Test

Type	Icebreaker or Team-building
Time	10 to 15 minutes per person
Objective	Gain perspective about where you are in life and what legacy you would like to leave behind
Outcome	Explore where you want to be (legacy) as compared to where you are now, while helping the group get to know what's important to each member.

Description of the exercise

Have you ever thought about what you want written on your tombstone? What do you hope will be said about you at your funeral? Try writing those things down. If you like them, then think about whether you are living up to them now … or if you have some work ahead of you.

By contemplating our mortality, we can gain an incredible sense of perspective and clarity that can help us decide what to do with our lives, while introducing the urgency we need to take action and accomplish those goals and dreams.

Step-by-step instructions

Each member writes down what they want written on their tombstone and shares it with the group.