



# Peer Group

## Member Guide



## President's Welcome

Dear CFO Circle Member,

Welcome to CFO Circle. I am truly pleased to have you join this community of accomplished financial leaders who are committed to continuous growth, strong decision-making, and learning from one another's experience.

CFO Circle was created to provide a structured, confidential environment where CFOs can step away from the day-to-day demands of the role and work on the strategic challenges that truly move organizations forward. The power of this group lies not in advice, but in the collective experience, perspective, and disciplined peer-learning process that allows members to gain clarity and take meaningful action.

This Member Guide is designed to help you understand how our roundtable process works and how to engage in a way that maximizes value for both you and your peers. The structure, ground rules, and meeting flow outlined in this guide are proven methods for fostering trust, productive dialogue, and real business impact.

CFO Circle is most successful when members arrive prepared, participate openly, and respect the process and one another. By doing so, you will not only gain powerful insight into your own challenges, but you will also contribute to the growth and success of others in the group.

I am excited to have you as part of CFO Circle and look forward to the value you will both gain and bring to this community.

Warm regards,

Paul Wirth  
President  
CFO Circle

## How This Member Guide Supports Your Success

This Member Guide is intended to serve as a practical reference for your CFO Circle experience. Its purpose is to help you understand how the roundtable process works, what to expect in each meeting, and how to engage in a way that maximizes value for both you and your peers.

### **Inside this guide, you will find:**

- An overview of the peer-learning roundtable model and why structure matters
- The ground rules that protect trust, confidentiality, and productive dialogue
- Clear expectations for member participation and engagement
- A step-by-step explanation of the meeting flow and issue-processing process
- Guidance on how to prepare for meetings and contribute effectively

Rather than presenting theory, this guide outlines the specific disciplines and practices that enable CFO Circle to function as a high-performing peer group. Understanding these elements will help you:

- Frame challenges in a way that leads to deeper insight
- Contribute experience that is relevant and useful to others
- Extract value from discussions even when your issue is not being processed
- Build trusted relationships within the group over time

CFO Circle works best when members arrive prepared, engage thoughtfully, and respect the process. This guide is designed to help you do exactly that.

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## Overview: The Peer-Learning Process

Peer learning is the practice of gaining insight through structured interaction with others who face similar responsibilities, decisions, and pressures. In the context of CFO Circle, peer learning means drawing on the real-world experience of fellow CFOs to improve judgment, clarity, and decision-making.

Small groups of experienced leaders, working within a disciplined roundtable structure, are uniquely effective at surfacing insight that is difficult to access in isolation. By participating in CFO Circle, members benefit not only from diverse perspectives, but from a process designed to move conversations beyond surface-level discussion and toward meaningful reflection and action.

The roundtable environment enables CFOs to step away from day-to-day demands and focus on the strategic and leadership challenges that shape long-term outcomes. Over time, this shared discipline strengthens both individual effectiveness and collective intelligence.

At the core of effective decision-making are three interconnected elements:

### **Information**

The facts, data, and context that ground potential choices. These may come from formal reports, operational metrics, or structured peer discussion.

### **Insight**

A clearer understanding of direction, trade-offs, and implications—often gained by testing assumptions against the lived experience of others.

### **Intuition**

The refined judgment that develops through accumulated experience. Peer groups accelerate this development by exposing members to a wide range of real-world situations and outcomes.

CFO Circle is built on the belief that disciplined peer interaction strengthens all three elements. By engaging consistently in a structured, confidential roundtable, members develop sharper judgment, greater confidence, and improved decision-making over time.

## **What to Expect Over Time as a CFO Circle Member**

CFO Circle is not designed to deliver its full value in a single meeting. Like any disciplined professional practice, its impact compounds over time as members grow more fluent in the process and more familiar with one another's perspectives.

While every member's experience is unique, most CFOs notice a clear progression:

### **Early Meetings: Learning the Process**

In the first few months, the primary focus is understanding the structure—how updates work, how issues are framed, and how experience is shared rather than advice given. Members often find themselves listening more than speaking as they learn the rhythm and discipline of the roundtable.

### **Mid-Cycle: Pattern Recognition and Sharper Insight**

As familiarity grows, members begin to recognize patterns across issues, industries, and leadership situations. Questions become sharper. Contributions become more targeted. Even when another member's issue is being processed, relevance increases as parallels emerge.

### **Later Stages: Accelerated Judgment and Trusted Perspective**

Over time, the group develops a shared language and trust that allows for deeper exploration of complex issues. Members report faster clarity, improved intuition, and greater confidence in decision-making—both inside and outside the meeting.

The value of CFO Circle is cumulative. Each meeting builds on the last, strengthening both individual judgment and the collective intelligence of the group.

# The Role of the CFO Assessment

One of the foundational tools used within CFO Circle is the CFO Effectiveness Assessment, built around the 8-Key Drivers of CFO Success. The assessment exists for a simple but powerful reason: leaders cannot intentionally improve what they have not clearly defined or measured.

Most CFOs are evaluated informally—through outcomes, perceptions, and moments of pressure—rather than through a structured view of how the role is actually being performed. This assessment provides that structure. It creates a shared language for understanding the CFO role, clarifies where impact is strongest today, and highlights where focused development can meaningfully expand influence, effectiveness, and career optionality.

## Why We Assess Ourselves

The purpose of the assessment is not judgment. It is awareness.

CFOs operate in complex environments shaped by organizational maturity, ownership structure, leadership dynamics, and market conditions. As a result, performance is often constrained not by capability, but by role definition, expectations, or historical habits. The assessment helps separate what is situational from what is developmental.

By stepping back and assessing ourselves honestly, we gain clarity on how we are currently showing up across the full scope of the CFO role, where our strengths are creating leverage, where gaps may be limiting effectiveness, and which areas represent the highest-return opportunities for growth.

## How the Assessment Works

The CFO Effectiveness Assessment consists of scenario-based questions across eight core dimensions of the CFO role. Rather than testing knowledge or credentials, the questions focus on how the role actually functions today—in practice, not in theory.

Each response contributes to a driver-level score that rolls up into an overall effectiveness profile. Results include an overall score, individual driver scores, narrative descriptions aligned to the CFO's current effectiveness stage, and practical guidance for progression.

## The 8-Key Drivers of CFO Success

The assessment evaluates effectiveness across the following eight drivers, which together define the modern CFO role:

### **Strategic Financial Alignment**

The degree to which financial strategy actively shapes and supports business strategy, not just execution.

### **Drive Growth & Profitability**

The ability to translate financial insight into sustainable, value-creating growth with disciplined economics.

### **Balance Risk & Innovation**

How effectively the CFO protects downside risk while enabling thoughtful experimentation and progress.

### **Foster a Data-Driven Culture**

The extent to which reliable, trusted data informs decisions across the organization—not just in finance.

### **Manage Stakeholder Relationships**

The CFO's effectiveness in building trust, shaping expectations, and guiding stakeholders through change.

### **Continuous Skills Development**

The intentional development of skills required as the CFO role evolves in complexity and expectation.

### **Mentor & Team Development**

The ability to build a capable finance organization that scales without over-reliance on the CFO.

### **Ensure Long-Term Value Creation**

How consistently financial decisions strengthen durability, scalability, and future optionality.

Each driver reflects a distinct dimension of leadership leverage. Improvement in one often unlocks progress in others.

## The Four Stages of CFO Effectiveness

The assessment categorizes results into four stages that reflect how broadly and deeply the CFO role is operating today:

### Foundational CFO

Effectiveness is rooted in control, execution, and reliability. The organization often depends heavily on the CFO personally, limiting scalability.

### Functional CFO

Strong financial leadership is present, and finance contributes meaningfully to outcomes—but influence may be uneven or situational.

### Strategic CFO

Finance is embedded in decision-making. The CFO is a trusted partner shaping growth, risk, and long-term priorities.

### Transformational CFO

The CFO operates as an enterprise leader, building systems, leaders, and decision frameworks that create durable value beyond individual involvement.

A common question arises: *Should every CFO aspire to become Transformational?*

The answer is nuanced. Not every role or organization requires a Transformational CFO at all times. However, greater effectiveness always expands optionality—for the CFO and for the business. As organizations grow, complexity increases. CFOs who do not evolve risk becoming constraints rather than catalysts. Progression is less about ambition and more about remaining aligned with the needs of the enterprise and the trajectory of one's career.

## How the Assessment Is Used in CFO Circle

The assessment is not a one-time exercise. It serves as a practical foundation for the CFO Circle experience.

Over the course of eight of the twelve annual meetings, the group goes deeper into one of the 8-Key Drivers at a time. These sessions are designed to:

- Explore what the driver looks like at different effectiveness stages
- Share real-world experiences from peers operating at different levels

- Identify practical actions that strengthen effectiveness in that area

Following each driver discussion, members select one or two specific goals related to that driver—either personal, organizational, or both. These goals are shared with the group, discussed openly, and revisited in subsequent meetings.

This creates a powerful accountability loop:

**Insight → Commitment → Action → Reflection**

Members are not only learning frameworks—they are applying them, supported by peers who understand the complexity of the role.

## **A Developmental Tool, Not a Destination**

The CFO Effectiveness Assessment is best viewed as a mirror, not a finish line. It provides a clear picture of today so that tomorrow can be shaped intentionally.

Revisiting the assessment over time allows CFOs to track progress, recalibrate focus, and ensure their leadership continues to evolve alongside their organization. When paired with disciplined peer discussion and accountability, the assessment becomes a catalyst for sustained growth—professionally, strategically, and personally.

# Your Guide to the Roundtable Process

The value of CFO Circle is realized through disciplined participation in a structured roundtable process. Each meeting follows a consistent format designed to help members move efficiently from updates, to insight, to action.

As a participant, your role is to engage with intention. This includes arriving prepared, listening actively, contributing thoughtfully, and respecting the structure that governs the discussion. The process is designed to ensure balanced participation, focused dialogue, and productive use of time.

The sections that follow explain how the roundtable operates in practice—how meetings are structured, how issues are selected and explored, and how accountability is reinforced. Understanding this process will help you participate more effectively and extract greater value from each session.

## How CFO Circle Differs from Other Professional Groups

Many CFOs participate in professional associations, networking events, or informal peer gatherings. CFO Circle is intentionally different.

### **CFO Circle is:**

- A facilitated peer-learning forum, not a networking group
- Experience-driven rather than advice-driven
- Structured to ensure balanced participation and depth of discussion
- Designed for long-term engagement rather than one-off events

The discipline of the process—time limits, issue framing, confidentiality, and shared accountability—is what allows CFO Circle to move beyond surface-level conversation and into meaningful strategic insight.

Understanding this distinction helps members shift mindset when entering the room and fully engage in the peer-learning experience.

# The Role of the Chapter Director

At the core of each CFO Circle chapter is the Chapter Director. The Chapter Director serves as the facilitator and steward of the peer-learning process, responsible for maintaining the structure, discipline, and environment that enable productive peer discussion.

The Chapter Director does not act as an instructor, advisor, or subject-matter expert. Instead, their role is to manage the process through which members learn from one another's experience. This disciplined facilitation is what transforms a group of accomplished CFOs into an effective peer advisory forum.

## Core Responsibilities of the Chapter Director

Your Chapter Director is responsible for:

- Organizing and preparing each meeting to ensure a consistent, high-quality experience
- Educating members on the roundtable structure, objectives, and operating norms
- Enforcing the ground rules that protect trust, confidentiality, and balanced participation
- Guiding discussions to maintain focus, pacing, and relevance
- Facilitating issue processing so conversations move from challenge to insight to action

Through these responsibilities, the Chapter Director protects the integrity of the roundtable and ensures that each meeting remains structured, confidential, and results-oriented.

## The Power of Structure

One of the defining strengths of the CFO Circle model is what we refer to as the *paradox of structure*. While senior leaders often value independence and flexibility, the greatest insight tends to emerge within a disciplined, well-defined framework.

The structured agenda, assigned roles, time boundaries, and consistent process are not constraints. They are the mechanisms that enable:

- Balanced participation among strong personalities
- Focused discussion that avoids digression
- Efficient use of time
- Trust and continuity across meetings

By following the same proven sequence each month, the group develops momentum and depth, allowing discussions to move beyond surface-level conversation and into meaningful strategic reflection.

### **Maintaining a High-Functioning Peer Environment**

Without structure, peer groups can drift into common pitfalls—dominating voices, unfocused discussion, side conversations, or unproductive storytelling. The Chapter Director actively manages these dynamics to protect the quality of the experience for all members.

A typical CFO Circle meeting begins with structured updates that surface themes and priorities. Selected issues are then explored through a disciplined process of clarification, experience sharing, and reflection. This sequence is intentionally designed to foster insight while maintaining respect, confidentiality, and focus.

It is this process—not advice, networking, or informal discussion—that produces the outcomes CFO Circle is designed to deliver.

### **Who Serves as a Chapter Director**

Chapter Directors are selected based on their leadership experience and facilitation capability. While backgrounds vary, they share a common profile that positions them to guide high-performing peer groups effectively.

A typical Chapter Director is:

- A seasoned business leader, executive, consultant, or former C-suite professional
- Experienced in strategic thinking, leadership development, and organizational dynamics
- Skilled at facilitating discussion and managing group dynamics
- Trained in CFO Circle’s roundtable methodology and best practices
- Committed to professionalism, confidentiality, and member success

Their expertise lies not in providing answers, but in creating the conditions where insight can emerge.

### **What Makes Chapter Directors Uniquely Qualified**

Chapter Directors are not simply meeting organizers. They are trained process leaders whose expertise lies in managing the environment where peer learning occurs.

Specifically, Chapter Directors are skilled in:

- Drawing out insight from diverse perspectives
- Keeping discussions focused, balanced, and productive
- Managing strong personalities while ensuring equal participation
- Enforcing structure without limiting open dialogue
- Maintaining trust, safety, and confidentiality within the group

By combining real-world leadership experience with disciplined facilitation, Chapter Directors create the conditions for deeper thinking, better decisions, and sustained professional growth.

### **A Partnership in Your Success**

The Chapter Director works in partnership with you and your fellow members to ensure that each CFO Circle meeting delivers meaningful value. When members engage fully and respect the process, the roundtable becomes a powerful forum for clarity, accountability, and improved decision-making.

While the structure may feel formal initially, over time it becomes the engine that drives trust, insight, and sustained professional growth.

## Roundtable Ground Rules: The 4 C's

For a roundtable to succeed, everyone must follow four ground rules. Each participant must understand and promise to honor these ground rules for the group to operate effectively and prove sustainable over time.

New participants must understand these ground rules (listed below) before their first meeting and should receive positive, constructive reinforcement as needed. The ground rules are non-negotiable and strict. Even a one-time violation of confidentiality, for example, may be cause for dismissal from the group.

### Confidentiality

Comments in the group must not leave the room under any circumstances. The long-term value and productivity of the group is founded on a gradual building of trust among its members. Confidentiality is a vital part of that process.

### Communication Protocol

Members communicate respectfully, speaking from experience to demonstrate their point of view (rather than giving advice).

Everyone speaks, yet no one dominates the conversation. No idea is “wrong.” No one lectures. Interruptions are forbidden unless speakers exceed prescribed time limits.

### Commitment to the Roundtable Agenda

In roundtables, the agenda serves as much more than a schedule of items to be covered. It's a critical element in a sequential process that guides effective peer learning. By committing to a time-tested, well-organized process, a roundtable extracts the most value from every meeting. Everyone agrees to respect the agenda and the process that characterizes the roundtable experience.

### Care for Roundtable Health

Everyone takes responsibility for the group's ongoing health and vitality by participating in periodic diagnostic assessments, surveys and retreats.

The Roundtable Ground Rules provide the essential building blocks for creating a stable and productive peer-learning environment. They are based on years of experience working directly with business-owner roundtables and on an assessment of the collective best practices generated by dozens of organizations across the country currently managing roundtable events. These ground rules provide the framework for customizing the operational guidelines unique to each roundtable.

## Your Role as a Member

Clear guidelines and standards set the stage for an effective peer group. These guidelines, co-designed and agreed upon by the members of your roundtable, help everyone understand the goal of the roundtable and encourage the behaviors, actions and attitudes that promote trust and support.

In some roundtables, facilitators and participants also work together to write a formal code of conduct that summarizes the group's ground rules and guidelines. Or they collaborate to write a mission statement that fortifies the group's healthy evolution. Your group may want to consider those actions as well.

In any case, it's crucial that you take personal responsibility to understand the guidelines and to encourage others to follow them. Without such guidelines, your group members may come to the table with clashing needs, narrow perspectives and misguided assumptions. By understanding the purpose of the roundtable from the outset and reinforcing the expectations and standards that everyone agrees to, the members of your group will gain alignment and avoid misunderstandings.

## Your Role in Sustaining a High-Functioning Peer Group

CFO Circle functions at its highest level when members view themselves not only as participants, but as stewards of the peer-learning environment. While the Chapter Director facilitates each meeting, the long-term effectiveness of the group depends on shared ownership.

As a member, this stewardship includes:

- Supporting balanced participation so all perspectives are heard
- Reinforcing experience-sharing rather than solution-giving
- Remaining engaged and attentive, even when another member's issue is being explored
- Helping newer members acclimate to the structure and norms of the group
- Raising concerns constructively through the Chapter Director when issues arise

High-performing peer groups do not sustain themselves automatically. They are shaped over time by members who value discipline, mutual respect, and long-term benefit over short-term convenience.

By taking responsibility for the health of the group, you help ensure that CFO Circle remains a trusted, focused, and high-value forum for everyone involved.

## **Guidelines for Roundtable Members:**

- 1. Orient new participants.** Before newcomers attend a roundtable meeting, coordinate a time for the new member to meet with the facilitator or mentor (experienced roundtable participant) to learn the group's ground rules. For example, the mentor can discuss the importance of sharing experience rather than giving advice or share the best way to deliver an update to the group.
- 2. Treat the group as one.** Roundtables produce the greatest payoff when participants gel as a unit. Internal cliques sap the group's sense of shared mission.
- 3. Help the group to be enthusiastic.** Set an example of energy and enthusiasm within your roundtable. Adopt an excited, curious attitude so that you're always eager to learn and grow. Your positive spirit will prove contagious.
- 4. Do not allow competing businesses.** Participants should operate in non-competing businesses. This heightens the level of disclosure in the group, resulting in the deeper level of interaction required for solving complex problems.
- 5. Be careful about business dealings among peers.** It's better if you and your roundtable peers do not conduct business with each other, especially during the early stages of your group's formation.

Members who treat roundtables as lead generators detract from the shared goals of support, personal growth and practical business problem solving that everyone seeks. Confidential discussions required to address serious business issues, for instance, may be diluted as members become reluctant to reveal information that might affect a business relationship within the group.

As the group matures, however, you and the other members of your group may agree to allow business dealings among yourselves based on the mutual trust you've developed and with full disclosure to everyone. If a problem arises from a business relationship between peers, they must turn to the facilitator to resolve the problem promptly so that the rest of the group is not affected. In extreme cases, the solution may be for one of the members to leave the group.

**6. Do not allow romantic relationships.** Intense emotional involvement between two participants changes the dynamic of the group and can jeopardize its integrity. To maintain the value of the group process, one of the participants should seek membership in another roundtable.

**7. On-time and consistent attendance necessary.** Poor attendance and punctuality signal disaster. The standard number of allowable absences per year is two. Once someone misses a second meeting, the group may want to consider termination. If extenuating circumstances result in an exception, it should be clear that the action is not a precedent.

**8. Do not allow alcohol.** Alcohol served before or during a meeting can influence the quality of participation and thinking. Food can prove distracting during portions of the meeting that require highly focused attention.

**9. Turn off mobile phones and pagers.** No one should take calls during a meeting, except in an emergency.

Clearly, each roundtable is unique by virtue of its composition, so some flexibility may occur when operational guidelines are designed. The key is to strike a successful balance between the structure that the recommended guidelines offer and the customization members might desire.

In the end, successful customization depends upon a clear understanding of the implications of altering recommended guidelines. The roundtable ground rules and guidelines represent the foundation and framing needed to construct a sound roundtable structure. The specific elements of the roundtable process and the related roles and responsibilities of the members represent the essential detail work needed for a well-designed and satisfying roundtable experience. The remaining pages of this section are devoted to defining specific agenda elements and explaining why they are essential to the process.

## **Roundtable Agenda: Rationale and Timetable**

Peer groups that operate at the highest level of effectiveness typically follow a structured agenda, consisting of a specific and timed sequence of events. By understanding and appreciating the structure of this process, you and your fellow participants will know what to expect and how to prepare effectively. Each stage of the agenda contributes to fostering the trust and camaraderie essential for both personal and professional breakthroughs.

The breakdown below assumes a typical three-hour roundtable session with no more than 15 participants. While the time frames and number of attendees may vary, this outline provides an overview of how a session progresses from start to finish. Every part of the agenda—even those that last just one minute—plays a vital role in enhancing the productivity of the roundtable. The session is guided by the facilitator.

Meeting Phase	3-Hour Meeting (180 min)	4-Hour Meeting (240 min)
<b>Opening</b> (confidentiality reminder, objectives for the day)	5 min	5 min
<b>Member Updates</b> (structured check-ins)	45 min	45 min
<b>Host Presentation</b> (sponsor or host, within boundaries)	30 min	30 min
<b>Learning Segment</b> (framework-based discussion; CD-led or sponsor-led within boundaries)	30 min	30 min
<b>Break</b>	5 min	10 min
<b>Issue Processing / Hot Seat</b> (deep dive on member issues with peer input)	55 min	110 min
<b>Commitments and Close</b> (each member states one next step)	10 min	10 min
<b>Total Time</b>	<b>180 min (3 hours)</b>	<b>240 min (4 hours)</b>

## 5 Process Steps of Roundtable Operation

At the heart of the CFO Circle experience is a disciplined roundtable process. This structure allows members to make the most of their time together by moving efficiently from updates, to insight, to action—without losing the depth and trust that define the group.

While the process is consistent from meeting to meeting, the discussions themselves are shaped by the real challenges members bring into the room. Understanding how the process works will help you engage more fully and benefit more deeply from each session.

Each meeting follows five interconnected steps:

- **Step 1:** Opening and Member Updates
- **Step 2:** Ranking and Selecting Issues
- **Step 3:** Issue Processing
- **Step 4:** Action Commitments

- **Step 5: Summary and Closing Reflections**

Together, these steps create a rhythm that balances structure with flexibility, allowing meaningful conversations to unfold naturally while staying focused and productive.

## Step 1: Opening and Update

Each meeting begins by setting the tone and preparing the group for thoughtful dialogue later in the session.

A brief opening exercise helps members shift from the demands of the day into the shared space of the group. This moment of connection provides insight into where each member is mentally and emotionally—context that often proves valuable as issues are later explored.

Because CFO Circle conversations frequently involve sensitive business and personal matters, every meeting opens and closes with a reminder of our confidentiality commitment. Simply stated: *what is shared in the room stays in the room*. This shared understanding is essential to the trust that allows members to speak openly and candidly.

To support the flow of the meeting, a few light roles are assigned and rotated among members. These roles help maintain focus and pacing while reinforcing shared ownership of the process. Typical roles include:

- **Process Monitor:** Helps the group stay aligned with the roundtable norms
- **Note Taker:** Captures key questions and themes
- **Timekeeper:** Helps the group remain mindful of time

The opening step concludes with **3-Minute Member Updates**. Each member briefly shares key developments since the last meeting, including recent wins, challenges, and pressing issues. These updates help surface potential topics for deeper discussion later in the session.

	<b>News – Positive and Negative</b>	<b>Pressing Issues</b>
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<b>Business</b>		
<b>Personal</b>		
<b>Family</b>		

## Step 2: Ranking and Choosing

Following the updates, the group shifts from sharing information to setting priorities.

As members listen to one another, common themes often emerge. Members may also note an issue that is top of mind when signing in. With guidance from the Chapter Director, the group briefly discusses the collected topics and determines which issues are most appropriate to process during the meeting.

Not every issue will be addressed in every session. The goal is to focus the group’s collective experience and attention on where it can provide the greatest value, given the time available.

Once one or more issues are selected, the group moves into the core of the meeting.

### What Makes an Issue Effective for Roundtable Processing

Not every challenge benefits equally from peer discussion. Issues that generate the greatest insight tend to be framed clearly, focused on a real decision, and open to multiple perspectives.

Effective issues typically share these characteristics:

- Framed as a clear question, beginning with **“How do I...?”**
- Centered on a decision, dilemma, or trade-off rather than a status update
- Defined narrowly enough to be explored meaningfully within the time available
- Open to learning, rather than seeking validation for a predetermined conclusion

Issues that are vague, overly tactical, or framed as explanations rather than questions tend to limit the value of group discussion.

Taking a few minutes before each meeting to reflect on what decision you are actually facing—and how to frame it clearly—significantly improves the depth of insight you and the group can achieve.

### **Step 3: Issue Processing**

Issue processing is the centerpiece of the CFO Circle experience. This is where members gain perspective, challenge assumptions, and learn from the lived experiences of their peers.

The member whose issue has been selected begins by summarizing the situation, sharing relevant facts and context, and outlining any actions already taken. The member also clarifies what kind of help they are seeking and identifies any options that are not on the table.

To sharpen focus, the issue is framed as a clear question beginning with: **“How do I...?”**

Before discussion begins, the group pauses briefly to reflect on similar experiences they may have encountered in their own careers or lives. This intentional pause encourages more thoughtful and relevant contributions.

The group then moves into clarifying questions. These questions are designed to deepen understanding—not to offer solutions. Their purpose is to uncover root causes and ensure the issue is fully understood before experiences are shared.

Once clarifying questions are complete, members share relevant experiences from their own backgrounds. Contributions are kept concise to allow broad participation.

This distinction is important: CFO Circle emphasizes experience sharing rather than advice giving. Members value hearing how peers have navigated similar challenges, drawing insight from real-world decisions and outcomes. Advice may be offered when appropriate, but it is secondary to shared experience.

## Step 4: Action Commitments

Insight without action has limited value. For that reason, accountability is built into the process.

At the conclusion of issue processing, the member whose issue was discussed identifies one or two specific actions they are willing to take before the next meeting. These commitments help translate reflection into progress and provide continuity from one session to the next.

## Step 5: Summary and Closing Reflections

The meeting concludes with brief reflections from each member on what they learned or found valuable during the session.

Even when your own issue is not processed, discussions often mirror challenges you have faced, are currently facing, or may encounter in the future. As a result, members frequently find value in every meeting—regardless of whose issue is on the table.

This closing reflection reinforces one of the core principles of CFO Circle: collective insight, applied consistently over time, leads to better decisions and stronger leadership.

## When Your Issue Is Not Processed

It is natural to assume that the greatest value of a peer group comes when your own issue is selected for discussion. In practice, many members find that some of their most meaningful insights occur while listening to others.

This happens for several reasons:

- Issues raised by peers often mirror challenges you have faced—or will face—in a different context
- Hearing how others navigated similar decisions expands your option set
- Observing how issues are framed helps refine your own thinking before a challenge becomes urgent

Patterns emerge across multiple discussions that would be difficult to see in isolation

Because CFO Circle emphasizes experience-sharing rather than advice, each discussion becomes a case study drawn from real leadership situations. Over time, these accumulated

experiences sharpen judgment, improve decision-making, and reduce the sense of isolation that often accompanies the CFO role.

Your engagement—listening carefully, asking thoughtful questions, and reflecting on relevance—is just as important as presenting an issue.

## What This Means for You as a Member

Your value from CFO Circle is directly tied to your engagement in the process and your willingness to participate openly and thoughtfully.

As a member, you are not expected to have all the answers—only to bring your experience, perspective, and attention to the room. The structure of the roundtable ensures that every voice is heard, issues are explored deeply, and time is used well.

Specifically, this means:

- **Come prepared.** Take a few minutes before each meeting to reflect on recent developments and the issues most top of mind for you. Clear updates lead to better discussions.
- **Listen as intently as you speak.** Many of the most valuable insights come from hearing how peers have handled challenges similar to your own.
- **Ask thoughtful questions.** Clarifying questions help the group uncover root causes and avoid surface-level solutions.
- **Share experiences, not prescriptions.** Your lived experience is often more valuable to others than advice.
- **Commit to action.** When your issue is processed, choose one or two meaningful actions and follow through before the next meeting.
- **Honor confidentiality.** Trust is the foundation of the group. What is shared in CFO Circle stays within the group.

Over time, members find that this disciplined, yet supportive environment sharpens decision-making, increases confidence, and reduces the isolation that often comes with the CFO role. The consistency of the process, combined with the quality of the peer group, is what allows CFO Circle to deliver lasting value.

# The Role of Sponsors in CFO Circle

CFO Circle partners with carefully selected sponsors and host organizations to enhance the member experience and support the local chapter community. These partners play an important role in providing meeting space, resources, and occasional educational perspectives that complement the peer-learning process.

While sponsors may serve as hosts or presenters during certain portions of a meeting, CFO Circle remains a peer-led, member-focused forum. The primary purpose of sponsor involvement is to support learning, connection, and the overall quality of the experience — not to promote products or services.

## Sponsors as Hosts

In many chapters, sponsors generously provide meeting venues, food and beverage, and logistical support that allow CFO Circle to operate in a professional and comfortable environment. When serving as hosts, sponsors help create a welcoming space for members to engage in discussion and learning.

Hosting does not imply influence over meeting content, member discussions, or issue processing. All peer sessions remain confidential and facilitated according to CFO Circle's structured roundtable process.

## Sponsors as Presenters

From time to time, a sponsor may lead a short educational presentation during the designated Host Presentation or Learning Segment of a meeting. These sessions are designed to:

- Share relevant industry insights, trends, or best practices
- Introduce frameworks or perspectives useful to CFOs
- Support members in thinking more strategically about their roles and businesses

Presentations are carefully guided by the Chapter Director to ensure they remain educational, practical, and aligned with the purpose of CFO Circle.

Sales pitches, product demonstrations, and promotional messaging are not part of the CFO Circle experience.

## What Sponsors Are Not

To preserve the integrity of the CFO Circle peer-learning environment, sponsors are **not**:

- A sales channel or prospecting platform
- A forum for pitching products or services
- Participants in confidential member issue processing
- Influencers of group decisions, discussions, or agenda priorities

Sponsors support CFO Circle through hosting, education, and partnership — while the roundtable experience remains member-led, confidential, and focused on peer learning.

## Protecting the Peer-Learning Environment

The core value of CFO Circle lies in the trust, confidentiality, and open exchange of experience among members. For that reason:

- Sponsors do not participate in confidential issue processing unless explicitly invited and approved by the group
- Member discussions remain private and are never used for marketing or business development purposes
- The roundtable agenda and ground rules always take precedence

This structure ensures that sponsor involvement enhances the experience without compromising the integrity of the peer group.

## A Balanced Partnership

CFO Circle's sponsor model is designed to create a mutually beneficial relationship:

- Members benefit from high-quality meeting environments and relevant educational insight
- Sponsors support the CFO community through service and thought leadership
- The roundtable process remains protected, neutral, and member-centered

By maintaining clear boundaries and expectations, CFO Circle preserves the trust and effectiveness that make the peer-learning experience so valuable.



## Conclusion: Leadership That Compounds Over Time

CFO Circle was created on the belief that the most effective financial leaders are not formed in isolation, but through disciplined reflection, shared experience, and intentional growth.

Within this community, structure creates clarity, trust enables candor, and collective insight strengthens judgment. Each meeting builds upon the last — sharpening perspective, expanding leadership capacity, and accelerating the ability to navigate complexity with confidence.

The true power of CFO Circle lies not in any single conversation, but in the compounding effect of thoughtful participation over time. Members who engage fully discover clearer thinking, stronger decisions, deeper relationships, and sustained professional growth.

As you step into this peer community, you become part of a group committed to excellence — not just in financial execution, but in leadership, impact, and long-term value creation.

We are honored to walk alongside you in this journey and look forward to the growth and impact that will unfold through CFO Circle.