the exchange

Accountability Workbook

September 2021 - June 2022

WESK
WOMEN ENTREPRENEURS SASKATCHEWAN

the exchange

TABLE OF CONTENTS

How to Use This Guidebook

The Exchange Accountability Workbook will help you track your progress and document your leadership and business accomplishments, challenges, and opportunities. As well, it is a guide on the essentials of The Exchange program so that we all know how to best work together. We will always strive to maximize our time together to help you achieve success in your business.

What is accountability?
As an entrepreneur, you are the leader and decision maker of your business. To address the myriad of business activities needed to operate, plan, and strategize your business, you need strategies and tools to hold yourself accountable. Accountability ensures that you deliver on the priorities and goals you set out.

What accountability strategies work for you?
We are all unique in our motivations and how we manage our many roles and responsibilities as entrepreneurs, leaders, mothers, spouses, daughters, and friends. Therefore, you will find that certain strategies for accountability will work better for you than others.

The Exchange is designed with accountability strategies already in place! Here is what will happen during your time in The Exchange. By using this guidebook, you will commit and participate in these strategies and perhaps, develop some new ones.

The Exchange's Accountability Strategies
- You will share your accountabilities in the monthly roundtable sessions with your Chair and Board Members. Saying what you will accomplish out loud to your peers can be motivating!
- You will spend time with your Chair in your coaching calls.
- You will write down your priorities, goals, accomplishments, and improvements to reinforce your commitment and to remind you of what needs to get done. This guidebook encourages you to write down and track your progress throughout the year.
- You will review your performance and celebrate your accomplishments. Think of this guidebook as your personal journal.

Ready to dive in?

Welcome to The Exchange

The Exchange is the catalyst for women entrepreneurs ready to harness their true potential and take their businesses to the next level of growth and profitability. Offered over a three-year term, the heart of the experience begins with a tailor-made “Board” designed to nourish your courageous spirit and bring out your very best. Boards will consist of 8-12 women entrepreneurs also known as “Board Members” who have been carefully selected to exchange knowledge and lessons learned along their business journey. Finally, your Board will have a “Chair” appointed; her wealth of experience as a successful businesswoman combined with a passion for entrepreneurship sets the stage for 10 months of enriched learning.

Through dynamic peer learning, coaching calls, retreats, presentations from inspiring and well-seasoned experts, and networking opportunities, each part of this program is crafted to hone your business acumen and entrepreneurial nerve. While you are investing in your own personal growth and supporting other women owned businesses in your Board, you will also positively impact the gender gap that currently exists in the Canadian entrepreneurship ecosystem.

https://wesk.ca/programs/the-exchange/

The Exchange Community

The success of The Exchange program relies upon information sharing amongst the Board Members and contributors including:

1. **PEER LEARNING**
   Peer to peer learning that the Board Members gain from one another;
2. **CHAIRS**
   Information sharing between the Chairs and Board Members;
3. **WESK TEAM**
   Information sharing between the WESK Program Team, the Chairs and Board Members.

The Exchange's Agreement of Intent

The purpose of this agreement is to maintain the integrity and privacy of The Exchange board so that all board members feel comfortable in hearing and sharing personal information during the meetings and other program gatherings.

Confidentiality and Safety

Within this board, I will honour each member by keeping discussion shared within the board confidential. I will commit to contributing positively towards a safe space to share in each and every board meeting. I will maintain confidentiality, meaning that I will not disclose any details of my fellow board member's business and personal sharing, unless they've explicitly provided consent to do so (for example, if their business opens a new location and they want the board to help spread the word). I will also leave blame, judgment, comparison, and competition outside of our safe space.

Commitment and Respect

I will commit to attending all meetings and to being on time for each board meeting, as well as my scheduled coaching call. Should circumstances arise beyond my control and I am unable to attend, or I will be late, I will contact the Board Chair to advise her. I understand that if I miss more than two (2) Board meetings in one program year, I will be required to meet with the WESK Program Staff and the Board Chair to determine if I will continue with the board.

Growth and Feedback

I will be open in giving and receiving constructive, positive comments to/from my board members. I will actively participate by presenting relevant issues and will be open to the comments and suggestions made to me.

Community and Belonging

I will be invited and encouraged to share, but I will not be pushed if I am not ready to do so. I will honour and make everyone feel welcomed and a part of the group. I will commit to doing the pre-work required for the meetings, which may include reading material or filling out tools provided to enhance our board learning and implementation.

If it becomes apparent that a member of the group is discussing a person or business with whom I am acquainted, I agree to acknowledge this relationship immediately. If I feel uncomfortable or feel there is a conflict of interest, I will request the conversation cease or alternately, I may remove myself from the room until the conversation is complete.

Unless I anticipate an emergency telephone call, I will turn off my phone during meetings.

Issues with a Board Member

If I have an issue with a Board Member's behavior, it is expected that I will discuss the concern solely with the Board Chair, and not with other board members. The Chair will work with WESK to review the concern and determine a course of action. If the concern is in relation to non-compliance with the Code of Conduct, the Chair and WESK will bring this up with the Board Member immediately and attempt to resolve the non-compliance. If the non-compliance continues after the first warning, the Chair and WESK will book a meeting with the Board Member to further review the non-compliance. The need for a third warning will result in the Board Member being asked to step down from the board.

Replacement of Board Members

If a Board Member must exit the program for personal or business reasons or is asked to step down from their spot in the program, a new Board Member will not be selected as a replacement.

The Exchange Workspace

Each cohort will have a webpage providing The Exchange's resources. You will find:

- Your Chair's contact information
- Your Chair's Calendly link (if relevant)
- Board Member Directory
- Expert presentations
- Evaluation forms

Roles and Responsibilities

To understand the function of The Exchange, the roles and responsibilities of the Chair, Board Member and WESK are outlined below.

The Exchange Chair Role

Each Board Chair will lead their assigned board, a cohort of 8 – 12 women entrepreneurs, grouped by revenue range, as they navigate through the program. The Board Chair will provide insight and guidance to each Board Member by facilitating monthly sessions and through one-to-one coaching calls every second month.

The Exchange Chair Responsibilities

- ✓ Attend all meetings
- ✓ Keep meetings on-track by ensuring that the meeting format is followed
- ✓ Provide information and insight from their own knowledge and experience
- ✓ Provide opportunities for Board Members to take risks within the group; and guide Board Members in taking risks that could assist in scaling their businesses
- ✓ Encourage all Board Members to participate actively in the cohort and facilitate balanced sharing in the group
- ✓ Acknowledge and celebrate successes
- ✓ Build and maintain a feeling of confidence and comfort between Board Members
- ✓ Build and maintain a cohesive cohort with equality and respect between Board Members
- ✓ Keep what is shared within the group absolutely confidential

Board Member Role

Without the dedication of each and every Board Member, a group cannot function. Board Members are expected to be committed to The Exchange cohort and the discussion process. They are expected to honor the Agreement of Intent and to adhere to the confidentiality agreement.

Board Members must be open to sharing their experiences, challenges, issues, ideas and solutions with the other Board Members of their cohort. They must also be open to change and to receiving both creative and critical comments. A Board Member may be asked to go beyond their comfort level in discussing possible solutions to a difficult situation. A Board Member needs to take new ideas and be proactive in working on action plans to meet goals. Board Members will also be required to provide feedback to guide The Exchange process.

Board Member Responsibilities

- ✓ Attend all meetings and retreats
- ✓ Identify specific goals they would like The Exchange cohort to help them achieve
- ✓ Take an action-oriented approach to problem solving
- ✓ Provide networking leads that may be helpful to other Board Members
- ✓ Help other Board Members with their development
- ✓ Maintain a journal of ideas/thoughts/reflections to aid in setting goals and evaluating progress in reaching them – “accountability workbook”
- ✓ Be open to the suggestions and creative comments offered to them by fellow Board Members and the Chair
- ✓ Book and attend coaching calls
- ✓ Attend Exchange Meets
- ✓ Keep what is shared within the group confidential
- ✓ Complete surveys

Calendar of Events

Throughout the year, we will introduce topics pertaining to leadership, finance, operations, human resources, and marketing. You can explore what your business will strive for and accomplishment in these areas.

September 2021

Inspirations: Nurturing the CEO Within

October 2021

Building More Effective Relationships

November 2021

The Big Picture: Working ON Your Business & Measuring Business Performance

December 2021

Networking Skills: Creating Connections in the Workplace

January 2021

Digital Market: Global is the New Frontier

February 2021

The Future of Work

March 2021

Digitization, Unleashed.

April 2021

Market Access: Beyond Your Backyard

May 2021

Pursuing Financing for Growth and Scale

June 2021

Reflections: Mastering Your Journey

The Exchange Monthly Meeting Sessions

Each month, The Exchange delivers a session focusing on a specific business topic. The expert presentation is provided in advance. To prepare, the board members will review the expert presentation prior to the session. During the monthly session, the expert will be available for a Q&A session. This is followed by the roundtable and accountability session with the chair and board members.

Agenda

TIME	AGENDA ITEM	LEAD
9:00 am - 9:10 am	Welcome & Updates from WESK	Chair
9:10 am - 9:30 am	Expert Discussion • 20-minute Q&A	Expert
9:30 am - 10:30 am	Round Table • Discuss the topic as it relates to your business and any other challenges you are facing	Chair
10:30 am - 10:55 am	Accountability Session • Last month I said I would do... • This is what I did... • Today I learned... • By next month, I will...	Chair
10:55 am - 11:00 am	Wrap Up	Chair

Coaching Calls

As a Board Member, you will be exposed to many topics and learning opportunities; some of which you would want to apply to your business sooner than later. To support you in mobilizing those ideas, one experience that The Exchange offers is bi-monthly coaching calls. These 20-minute private conversations are 1:1 between you and your Chair. Think of them as a safe place to exchange what's working, what's not working and discuss what next steps you are thinking about taking. Leveraging your Chair's expertise, these highly valuable working sessions focus exclusively on your business and are meant to provide immediate impact. Be sure to take advantage of these crucial conversations.

To schedule a coaching call, you can book with your Chair by accessing their Calendly online booking calendar which can be found on your cohort webpage.

Sometimes it's easier to introduce the check-in practice by using questions that focus more on the meeting content.

- What is one thing you hope to accomplish in this meeting today?
- What questions do you think need to be addressed in this meeting?
- What did you find helpful from our last meeting that you would like to continue doing today?

COACHING CALL AGENDA	TIME
Identify the specific issue for the session • What is the issue/goal you would like to focus on today?	**2 Minutes**
Set the goal or outcome for the session	**1 Minute**
Coach the Board Member	**7 Minutes**
Identify and commit to action • Board Member chooses action to commit to	**1 Minute**
Key outcomes • What are your take-aways from this session? • What new awareness or learning happened today? • How will this support you going forward?	**2 Minutes**
Accountability • Last month I said I would do... • This is what I did... • Today I learned... • By next month, I will...	**2 Minutes**

Business Strategy

Let's get started.

Now, let's strategize your business!

We have provided a template for you to work on throughout the year. If you have your business strategy completed, good for you! Now you can execute on your strategy. If you haven't completed your strategy, it is time to get started.

Here's how to complete the business strategy template. Questions are provided below to guide you.

Purpose

Why did you create this business?
What is the dream?
What gets you out of bed in the morning?

Vision

What are you aiming to achieve?

Mission

Why are we building this business?
How will you achieve your vision and purpose?

Focus

What direction are you taking your business this year?

Key Objectives

What will you work on this year?
Does it align with your vision, mission and purpose?

Initiatives

What are the priorities?
Does it align with your vision, mission, and purpose?
How will you execute on these priorities?

Key Performance Indicators

How will you measure it?
Are you measuring the right things?

Business Strategic Plan Template

STRATEGIC PLAN
PURPOSE:
MISSION:
VISION:
YEAR FOCUS:

KEY OBJECTIVES				
LEADERSHIP	FINANCE	OPERATIONS	HUMAN RESOURCES	SALES & MARKETING
INITIATIVES				
KEY PERFORMANCE INDICATORS				

September Retreat: Inspirations - Nurturing the CEO Within

You can use this as your checklist and journal for your leadership and business journey.

Keynote & Workshop
My Key Learnings (List up to 3):

September Retreat: Inspirations - Nurturing the CEO Within

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

September Retreat: Inspirations - Nurturing the CEO Within

My Business Progress
My Business Challenges
My Business Opportunities

September Retreat: Inspirations - Nurturing the CEO Within

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

October: Building More Effective Relationships

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

October: Building More Effective Relationships

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

October: Building More Effective Relationships

The Exchange Meets

Who did I meet?

Who will I follow-up with?

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

October: Building More Effective Relationships

My Business Progress
My Business Challenges
My Business Opportunities

October: Building More Effective Relationships

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

November: The Big Picture - Working ON Your Business & Measuring Business Performance

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

November: The Big Picture - Working ON Your Business & Measuring Business Performance

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

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November: The Big Picture - Working ON Your Business & Measuring Business Performance

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My Business Progress
My Business Challenges
My Business Opportunities

November: The Big Picture - Working ON Your Business & Measuring Business Performance

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

December: Networking Skills - Creating Connections in the Workplace

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

December: Networking Skills - Creating Connections in the Workplace

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

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Who will I follow-up with?

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

December: Networking Skills - Creating Connections in the Workplace

My Business Progress
My Business Challenges
My Business Opportunities

December: Networking Skills - Creating Connections in the Workplace

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

January: Digital Market - Global is the New Frontier

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

January: Digital Market - Global is the New Frontier

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

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January: Digital Market - Global is the New Frontier

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Who did I meet?

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My Leadership Development

What have I learned about myself?

What can I work on as a leader?

January: Digital Market - Global is the New Frontier

My Business Progress
My Business Challenges
My Business Opportunities

January: Digital Market - Global is the New Frontier

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

February: The Future of Work

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session
My Key Learnings (List up to 3):
My Accountability Last month I said I would do... This is what I did... Today I learned... By next month, I will...

February: The Future of Work

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

February: The Future of Work

The Exchange Meets

Who did I meet?

Who will I follow-up with?

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

February: The Future of Work

My Business Progress

My Business Challenges

My Business Opportunities

February: The Future of Work

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

March: Digitization, Unleashed

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session
My Key Learnings (List up to 3):
My Accountability Last month I said I would do... This is what I did... Today I learned... By next month, I will...

March: Digitization, Unleashed

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

March: Digitization, Unleashed

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Who did I meet?

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What have I learned about myself?

What can I work on as a leader?

March: Digitization, Unleashed

My Business Progress
My Business Challenges
My Business Opportunities

March: Digitization, Unleashed

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

April: Market Access - Beyond Your Backyard

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

April: Market Access - Beyond Your Backyard

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

April: Market Access - Beyond Your Backyard

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Who did I meet?

Who will I follow-up with?

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

April: Market Access - Beyond Your Backyard

My Business Progress
My Business Challenges
My Business Opportunities

April: Market Access - Beyond Your Backyard

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

May: Pursuing Financing for Growth and Scale

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

May: Pursuing Financing for Growth and Scale

My Coaching Call *Date: __________ Time: __________*

Question(s) for my Chair:

Lessons Learned from my Chair:

Next coaching call date: __________ Time: __________

May: Pursuing Financing for Growth and Scale

The Exchange Meets

Who did I meet?

Who will I follow-up with?

My Leadership Development

What have I learned about myself?

What can I work on as a leader?

May: Pursuing Financing for Growth and Scale

My Business Progress
My Business Challenges
My Business Opportunities

May: Pursuing Financing for Growth and Scale

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

June: Reflections - Mastering Your Journey

You can use this as your checklist and journal for your leadership and business journey.

Monthly Session

My Key Learnings (List up to 3):

My Accountability

Last month I said I would do...

This is what I did...

Today I learned...

By next month, I will...

June: Reflections - Mastering Your Journey

My Coaching Call *Date: __________ Time: __________*

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My Business Opportunities

June: Reflections - Mastering Your Journey

Potential Solutions

List at least three possible solutions.

Next Steps

What are you going to do next?

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Questions about The Exchange? Contact:

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