

Engage and Inspire Make the Most of Your Presentation

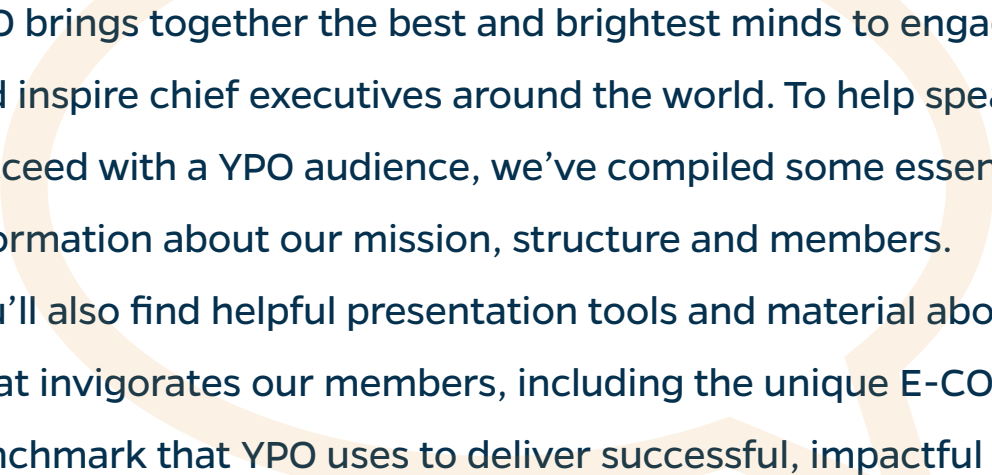
A GUIDE FOR YPO SPEAKERS

SEPTEMBER 2019



YPO

Learning



YPO brings together the best and brightest minds to engage and inspire chief executives around the world. To help speakers succeed with a YPO audience, we've compiled some essential information about our mission, structure and members. You'll also find helpful presentation tools and material about what invigorates our members, including the unique E-CODE benchmark that YPO uses to deliver successful, impactful events.

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Mission and Core Principles

A Community of Peers

YPO is the premier chief executive leadership organization in the world. We are a global community of peer leaders committed to a single mission: Better Leaders through Lifelong Learning and Idea Exchange™.

Our global reach is broader, and our access within key economies is deeper, than any other leadership organization of chief executives. Members apply their learning and ideas to help businesses grow and flourish, to support personal interests and family lives, and to serve in their local and global communities to make the world a better place.

YPO Membership

Fast Facts

- More than 28,000 members in 130 countries
- 14 regions worldwide
- 466 chapters within the regions
- Peer-led organization of chief executives, including entrepreneurs, family business leaders and professional managers
- Mission: Better Leaders through Lifelong Learning and Idea Exchange™

YPO Structure



Regions and Chapters

YPO membership covers 14 regions around the globe.

Chapters are the fundamental unit of YPO. Through these autonomous entities, members experience meaningful and relevant learning and networking opportunities. Chapter gatherings, held on average 10 times per year, cover business topics as well as personal development and community issues, and often include visits to member businesses.

Note: Event budgets can vary significantly by chapter.



The Peer-to-Peer Network

Member Engagement and Interaction

Members connect through lifelong leadership and learning opportunities.

- **Champions** are members who lead the design and implementation of chapter-level events, with each event having at least one champion.
- **Chapter events** encourage new insights on topics ranging from geopolitical and business to personal and community issues.
- **Executive education** pairs members, top businesses and leadership experts through alliances with leading institutions such as Harvard Business School, Stanford Business School, London Business School and more.
- **Forums** are groups of eight to 10 members who meet on a regular basis in an atmosphere of confidentiality, trust and openness to share in each other's business, family and personal experiences.
- **Global conference calls** connect members virtually with world-class experts.
- **Global events** are a stimulating blend of educational, business and social opportunities.
- **Networks** create unique opportunities for members to connect globally around topics, interests and industries. Members may join as many networks as they choose — 42 options span business, personal and social engagement sectors. Networks create member connections through face-to-face events and virtual networking.
- **Seminars and industry roundtables** connect members from different countries to examine specific industry trends and best practices.
- **YPO management associates**, more than 280 professionals around the world, provide ideas, expertise and support with learning opportunities and events.
- **The YPO Mentoring Program** expands the partnerships of possibilities through virtual and in-person matches, and furthers the Only-in-YPO connections that build better leaders and business.

YPO Member Snapshot

- Members are passionate about what they do and **value practical takeaways**.
- They crave intellectual stimulation and **continuously innovate** to achieve personal growth.
- Because of their experiences in YPO, members are **adept at integrating strengths** and traditions with new ventures and innovative opportunities.
- Peer-to-peer networking and approximately 5,000 annual events foster an **environment of shared experiences**, inspiration and wisdom that stimulates continuous improvement and growth — personally and professionally.
- Through YPO, members learn to **lead and manage change**. In the fast-paced world of business, the insights gained through a global network of peers create a multi-value, multicultural global perspective.
- Members enjoy **exclusive access** to world-renowned resources and life-changing experiences.

Members Want

- Actionable value in your presentation — new learnings that can be applied in C-level business, family, personal development or their local community
- Content that captivates and formats that challenge
- Life-changing takeaways
- Interactive and engaging presentations

Members Don't Want

- Static, behind-the-lectern presentations
- A traditional keynote speaker format followed by a Q&A session
- The ordinary and expected
- Selling of products or solicitation of business
- A presentation read off a PowerPoint

YPO Resource Directory: Gateway to Presenting at YPO

All speakers interested in addressing a YPO group are encouraged to first complete the [Speaker Profile](#) form, which provides essential information on your presentation.

One of the most important elements of your Speaker Profile is a three-minute video that we ask you to produce and upload, in which you explain how your presentation will benefit a YPO audience. The next two sections of this guide, “Plan for Speaker Success” and “E-CODE: Only-in-YPO Events,” provide some additional insights on what to include in your video. Please also refer to this helpful [how-to guide](#) for valuable tips on recording your video.

The content you provide in your Speaker Profile becomes part of the YPO Resource Directory, a dynamic site that all members can access when searching for speakers for their events. Find additional information about the directory in its [FAQ](#).

Plan for Speaker Success

Use these prompts when planning your presentation and communicating with your YPO contact to tailor content and meet member needs at the chapter, regional or global level.

1. Why have you selected this topic, and how does it help achieve your overall objectives?
2. What is the theme of the event I'll be speaking at, and what role will I play?
3. What do you want members to say, feel and think after attending the event?
4. What take-home value is needed to drive member success?
5. How would you describe the membership of your chapter, region or global event, as well as YPO's unique peer-to-peer culture?
6. What is the percentage of entrepreneurs, family business owners and professional members attending your chapter, region or global event?

7. What percentage of your members' businesses have global markets? What percentages have national, regional, local-only markets?
8. What are the industry demographics of member companies — how many are service, sales, manufacturing, financial?
9. What are your annual strategies and goals?
10. Are there any other details you can share about your event or annual plan that may help shape my presentation?

E-CODE: Only-in-YPO Events

YPO uses an E-CODE formula to design experiential events. Knowing the E-CODE helps you understand what members have come to expect at YPO events.

E ENGAGE PEERS

- Create a safe haven that supports open idea exchange and relationship building.
- Use member expertise for learning and mentoring opportunities.
- Encourage peer-to-peer interaction through meaningful activities and relevant topics.

C COMPELLING CONTENT

- Captivate members with impactful, actionable content and clear takeaways.
- Craft thought-provoking activities that push boundaries while respecting individuals' decisions and choices.
- Embrace diversity among people and perspectives through exercises that amplify and celebrate different viewpoints and life experiences.

O OPEN MINDS

- Seek thought leadership, regardless of its location or origin, to support personal and business growth.
- Engage the whole person through innovative experiences that awaken multiple senses.
- Challenge peers physically, emotionally and mentally.

D DELIVER VALUE

- Know the audience and go beyond expectations in planning, marketing and executing the event.
- Consider every experience as a favorable reflection on YPO and its brand, including thought leadership, diversity, inclusion and confidentiality.
- Support lifelong learning by challenging mindsets, attitudes and behaviors while respecting individual, geographical and cultural differences.

E EXTRAORDINARY RESOURCES

- Seek resources with remarkable life experiences and relevant, meaningful expertise.
- Empower resources to embrace forum protocol and share knowledge openly.
- Help resources succeed through powerful and varied delivery methods.

Applying the E-CODE



The following prompts help you plan and deliver an Only-in-YPO event.

Take-Home Value

Describe three actions that members can immediately apply.

Benefits

List three ways your presentation benefits members.

Measuring Success

Explain three outcomes that you use to measure the success of your presentation.

Set Yourself Apart

YPO members appreciate exclusive access and behind-the-scenes content. What information can you share that you don't normally offer to the general public?

Unique Expertise

What sets you apart from other thought leaders?

Delivery

Brainstorm innovative, interactive formats and activities that will increase audience participation and member interaction, and drive lifelong leadership and learning.

The Protocols for YPO's Safe-Haven Learning Boundaries for Potentially Controversial Topics

The following learning boundaries help us protect the safe haven of YPO by respecting individuals' decisions and choices:

- 1.** Telegraph and promote topics in a transparent manner.
 - For especially controversial topics, bring members from different views together in advance to ensure respect for sensitivities and to plan discussions.
 - Seek to ensure information shared is based in fact, not opinion. Some considerations to appropriately check facts are: (i) the viewpoint of an objective, disinterested person; (ii) any consensus view on the matter; and (iii) information from reputable, third-party sources.
 - There are certain topics that have no place in YPO, including topics that: (i) advocate, promote, or glorify physical harm or violence to another person or group of persons; (ii) is a punishable crime in the jurisdiction in which the event or discussion is located; or (iii) would harm YPO's reputation.
- 2.** Ensure that members can opt-in or opt-out of the discussion, and that promotional and related content about the topic are limited to those who have opted-in.
- 3.** Establish a boundary between explanation and learning vs. solicitation and advocacy. YPO favors relationships over transactions between members. Discussions must stop short of soliciting advocacy or action. There should be no statements in the name of YPO expressing a position on legislation, government policies or public officials.
- 4.** Encourage member-to-member idea exchange. Resources may be used to provide background and insights to stimulate discussions.
- 5.** Allow members to decide for themselves. Instead of a single view, well-crafted learning programming enables multiple views, either from resources, from member questions of resources and/or from discussions among members.
- 6.** Express and implement the following to members, participants and resources (before and during the discussion/event):
 - Explain the purpose of idea exchange and need for diversity in perspectives. Respect and do not disparage the views of others.
 - Explain perspectives and positions based on one's experience and data developed, instead of based on demeaning the "other side," including gender, culture, ethnicity, nationality, religion, and business industry, type or experience.
 - Be mindful that ideas expressed are those of individual members and participants, and not of YPO as an organization.
 - Apply modified forum protocols to ensure the discussion does not extend beyond those who opted-in.
 - Notify participants to report any abuses or deviations from these protocols to the event champion and/or the management team lead facilitating the event.
- 7.** Violation of these protocols with respect to a YPO sanctioned or affiliated event, experience or interaction by any member shall be a sanctionable offense subject to review by the YPO Global Conduct Committee.

Learning Boundary Considerations



While diverse points of view are always welcome, speakers will want to ensure that their presentation adheres to these principles:

- Fact-based content
- No solicitation or advocacy of a particular entity
- Sufficient context and information for members to draw their own conclusions
- No topics that promote violence or criminal intent
- No topics that would reflect negatively on YPO

Working With YPO Chapters

In most cases, you will work with three key stakeholders when planning a YPO chapter speaking engagement: the learning officer, day chair and chapter administrator. Here are their roles:

1. **Learning officers design and implement the learning program, negotiate your contract and set the event date.** YPO learning officers are your first point of contact to discuss theme, content, objectives and take-home value.
2. **Day chairs handle venue selection, marketing and other aspects of event planning.** The day chair may be charged with discussing the E-CODE (page 6) and take-home value with you.
3. **Chapter administrators handle logistics, including coordinating contracts, lodging and ground transportation.** Chapter administrators work closely with their chapter learning officer, who is your main contact for questions about planning your presentation.

The YPO speaker agreement includes a non-solicitation, promotion and sales policy that states speakers will give a non-commercial presentation and will not endorse a particular product, service or company. More information is available from your regional learning specialist.



- Know the **time requirements** for your presentation.
- Review the event **agenda in advance** and ask when you will present.
- Ask **who will introduce you** to the YPO audience. Send your bio, résumé or CV in advance to the event planners, as well as video links or demo reels. These materials will also be used to create a compelling YPO speaker profile available to both members and YPO management associates around the world.
- Begin your presentation with energy and **create opportunities to interactively engage** members at the start. Use an icebreaker to quickly establish a rapport.
- After the event, check in with the learning officer or day chair to find out **how your presentation was received**. Either one will be happy to relay feedback.

TOP TIPS

Traveling Resource Program: Maximize Your YPO Engagements

Due to budget constraints, it's not always possible for a single YPO chapter to underwrite a speaking fee for their desired speaker. But we can provide a solution that's a win-win for both speakers and chapters.

The Traveling Resource Program (TRP) offers you the opportunity to work with at least three, and possibly more, YPO chapters in one tour over consecutive dates.

These tours are member-led programs. A chapter or regional learning officer will identify a speaker that he or she would like to bring to that region and share with other chapters through a TRP.

The program maximizes connections to YPO audiences in a single trip, connects you with different chapters, expands your networking opportunities and minimizes travel time. The tour also increases your chance to make a greater impact among YPO members globally. To participate in a TRP, the speaker is expected to offer at least a 25 percent reduction on standard speaking fees. The learning officer who has identified the speaker markets the TRP opportunity to the chapters in his or her region.

Thank you for your interest in YPO. For more information about YPO speaking opportunities, please contact regionallearningspecialists@ypo.org for assistance.

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