

xchange

Facilitator Field Guide

2024 | January

Introducing the Facilitator Field Guide: your monthly backstage pass to the xchange experience. Uncover member-verified tips, real-world case studies, and community insights that'll have you mastering the art of conscious facilitation while staying in the loop with the latest happenings inside of xchange



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Three Ways to Apply xchange This Month

- ✓ Present a high point story question during your next team meeting: “What is a story of a moment in 2023 when our (customer experience/team) was at its best?” [Learning Lab Resource](#)
- ✓ Facilitate a connect choreography with a group [Learning Lab Resource](#)
- ✓ Practice enrolling the head and the heart for the next question and/or choreography you apply [Learning Lab Resource](#)



MEMBER PRO TIP

“Be open and curious when familiarizing yourself with the fundamental principles of the xchange Approach. Be creative, flexible, and adaptable when applying it to your business. Practice and trust the process.”

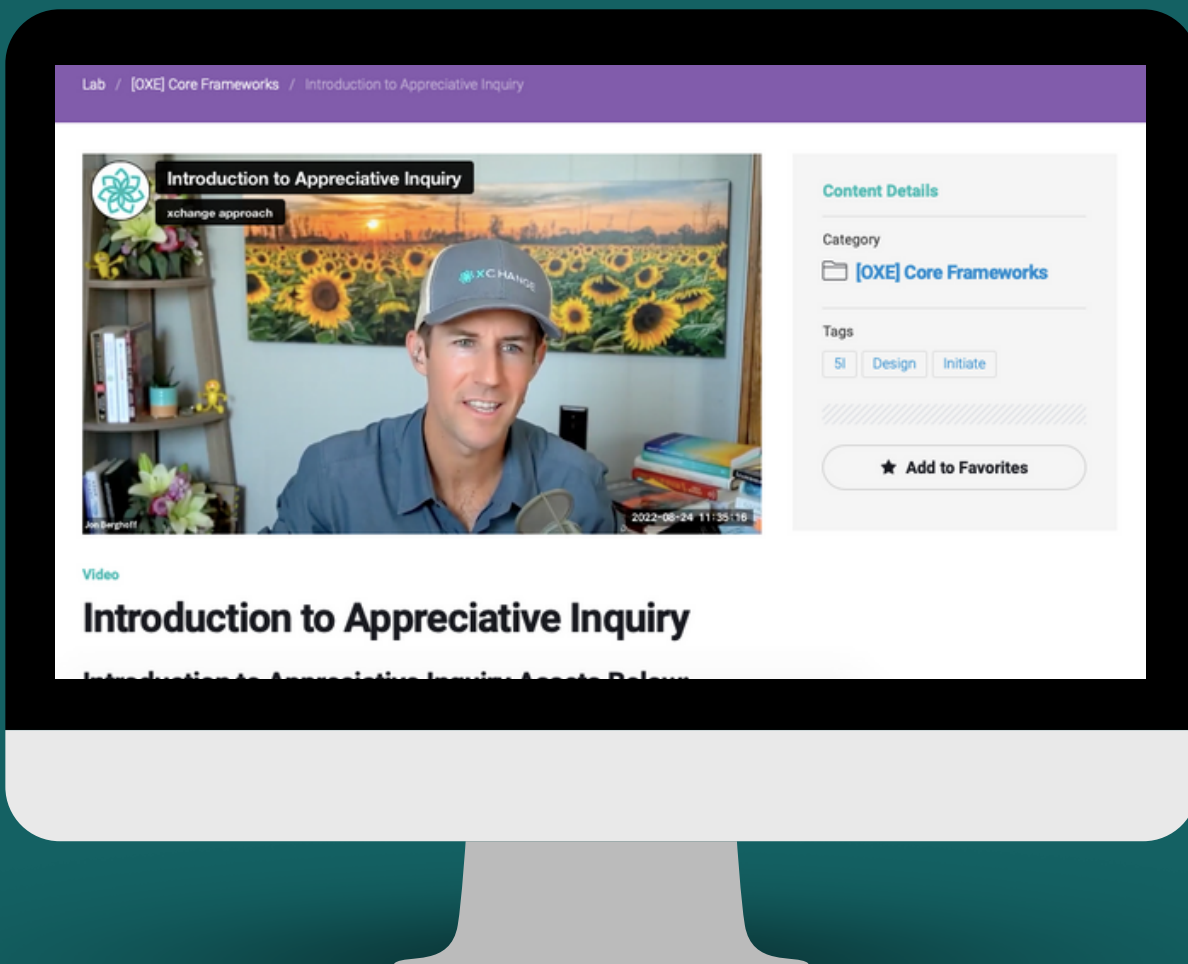
— Poli Wilson

What to Study This Month

Let's get back to the Foundations.

Watch Jon as he walks you through the **Introduction to Appreciative Inquiry** so you can feel confident in sharing the evidence and research at the core of the xchange Approach!

[Learning Lab Resource](#)



Important Reminders

1) Terms of Service

We have updated our [Terms of Service](#). These changes are aimed at fostering a clear understanding and facilitating our collective growth within the evolving xchange membership. Please take a moment to peruse the updated [Terms of Service](#).

2) RSVP you and your guest to Awakening Conscious Leadership Experience (ACLE)

- If you are a Mentorship (Level 3) or Mastery (Level 2) member, you have access to an ACLE Guest pass!
- Follow the directions listed [\[here\]](#) and register your guest [\[here\]](#)
- The deadline for guests to be registered is Tuesday, January 16th (*in the chance the event sells out the guest pass registration may close sooner than listed*).

AWAKENING CONSCIOUS LEADERSHIP

January 23-25, 2024

Join us for a 3-day Journey of Transformation

- Transform your current and future self through a neuroscience and mindfulness-based conscious leadership experience
- Implement practical strategies for managing stress, conflict and adversity
- Catalyze your growth and up-level your influence through a combination of reflective, conversational and situational leadership strategies
- Learn 15+ Presencing Practices to rewire unconscious patterns of reactivity, and increase your capacity for self-regulation,

With Special Guest Lynne Twist

Best-selling, award-winning author of, "The Soul of Money: Transforming Your Relationship with Money and Life"

CLICK OR SCAN

TO RSVP

OVERALL RATING
9.5 / 10

xchange

Testimonials:

- RAJ SISODIA, Cofounder of Conscious Capitalism: "xchange has stretched me and grown me in dimensions I had previously not explored - especially in how they facilitate their ACL program. They've taught me something I didn't even get in my PhD program - how to teach for impact."
- RON HILL, Former CEO of Redemption Plus and Founding Member of Conscious Capitalism Kansas City: "Conscious Leadership is the journey of a lifetime, this training gives you a toolbox to carry along your journey!"
- JULIE CRICHTON, Director of Talent & Employee Experience, GreenPath Financial Wellness: "In my 20+ years of HR experience, I've never witnessed so much focus and intention post-training on leaders actually USING what they learned every day. ACL has truly 'awakened' our leaders to being conscious of their own reactivity and their effect on others."

Visuals include: a sunburst logo, a book cover for 'Awakening Conscious Leadership', and three informational diagrams: 'The Micro and Macro of Conscious Leadership', 'Intentionality, Creativity and Your Bottom Line', and 'Awakening Creativity and Your Bottom Line'.



We deeply appreciate our Awakening Conscious Leadership partners

3) Join our upcoming Advanced Training: Business Development January 31, 12-4pm ET

The Advanced Training on Business Development is designed for members of the xchange Community who are eager to grow and expand their facilitation businesses, identify opportunities for collaboration and create new sources of value for their clients. This training will share the **proven strategies** we use at xchange to **grow our facilitation business** and how to **promote, sell, design and deliver value**, using the xchange Approach. Whether you're just starting out or already have a thriving consulting business, you'll learn proven business development strategies that you can immediately put into action. [Learn more and RSVP here](#)

ADVANCED TRAININGS

Available to Level 2 and 3 members, Advanced Training sessions are half to full-day online events, hosted by the xchange team and focused on one of three topic areas: Design & Facilitation, Presencing and Business Development.

BUSINESS DEVELOPMENT



Start, Grow & Scale a Facilitation Business

Learn how to identify opportunities for collaboration and create new sources of value for your clients. This training will share the proven strategies we use at xchange to grow our facilitation business and how to promote, sell, design and deliver value. Topics explored include:

- How to talk about xchange in plain language
- Questions to ask during sales conversations and client discovery
- Strategies that can be used to leverage pro-bono work and convert to paid, without sacrificing value
- A simple 3-step funnel that creates value and leaves prospects wanting more
- How to leverage various assets in the Learning Lab, including: client case studies, sample proposals, agreements, agendas and other resources will be used throughout the teaching, as well

Next Training: January 31

DESIGN & FACILITATION



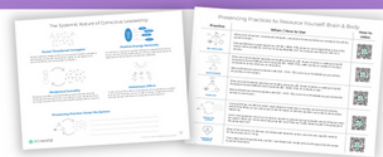
The Path Toward Mastery

Continue your never-ending learning journey towards mastering your craft, with deeper dives into advanced design and facilitation techniques. The Design & Facilitation Advanced Trainings are key milestones on your certification journey and the best way to continue enhancing your design and facilitation skills. Topics explored include:

- The Interview Choreography
- Crowdsourcing Values and Visions
- Keys to Powerful Enrollment
- The xchange Unified Space Principle for Physical Room Setup at In-person Events
- "One Conversation" choreography for brainstorming and idea sharing
- Crafting powerful How Might We questions
- Applying the 5I Framework for Whole System Strategic Planning

Next Training: February 21

PRESENCING



Cultivating Influence From Within

Transform your current and future self through a neuroscience and mindfulness-based conscious leadership experience that equips you to implement practical strategies for managing stress, conflict and adversity. Topics explored include:

- Leading groups with presence and influence, from the inside out
- Resourcing yourself with Presencing Practices to effectively manage the unexpected in groups
- Understanding and overcoming your triggers and hot spots when designing and facilitating
- Learning from case studies Awakening Conscious Leadership clients

Next Training: April 24



Advanced Trainings are recorded and available in the Learning Lab for Level 2 and Level 3 members.

MEMBER INSIGHT



"I took 12 pages of notes during the Business Development Advanced Training. I got a better understanding of the 3C model and how to use it as a selling tool. Also how to structure workshops and use them as strategic giving. The whole thing was great."

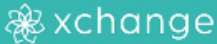
— Diedra Manns

A Story of Learning

A 'done for you' templated activity you can pick up and apply!

Use this worksheet to help guide a "Story of Learning" activity, designed to unlock real-time value among participants. This is by design a simple question, which can lead to powerful insights. [Click here to access this Learning Lab Resource](#)

A Story of Learning





Think of a real life **STORY** (or example) that reveals one of your **most powerful learnings** from the recent past.


- Perhaps from a **success** you'd like to celebrate OR from a **struggle** or **challenge** that reveals an important lesson.
- What have you **learned** from this story or example that would be **important to share** with others here today?


NOTES


INSTRUCTIONS


 **FORM GROUPS:**
When prompted, form **Groups of _____**, ideally with those you don't know or don't know as well.

 **SHARE:**
One person shares their story & lesson in about _____ mins. total.


 **ACKNOWLEDGE:**
Other group members quickly acknowledge what was shared (**30-sec. each**).
"Thank you for sharing, what I appreciated most was _____."

 **Repeat for all group members**

 **NOMINATE:**
After all have shared, nominate **ONE** story to share with the whole group.

 **TIMING:**
About _____ mins. **TOTAL** in small groups.

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Member #Debrief



Doreen Steenland
Level 2 Mastery Member
since March 2023

Applying Neuroscience and Somatic Practices to Coaching

CLIENT: ICF NJ **CLIENT TYPE:** Professional Coaches (ACC-MCC level in ICF)

EVENT DESCRIPTION

- Learn practical tools and exercises rooted in somatic coaching and neuroscience and how they can be integrated into your coaching for self-regulation and co-regulation during your coaching session. You will optimize your own somatic intelligence.
- Develop heightened awareness of the mind-body connection and its implications for your client's wellness.
- Deepen your ability to cultivate empathy, attunement, and rapport with your clients, as somatic coaching and neuroscience provide valuable insights into understanding emotions, non-verbal communication, and the nervous system's role in human connection.

CLIENT TYPE: Professional Coaches (ACC-MCC level in ICF)

IMPACT LEVEL: Statewide Coaching Businesses

DURATION: 1.5 hours

PARTICIPANTS: 45 new-to-seasoned coaches who were curious about neuroscience and somatic coaching.

SURVEY RATINGS: 9.4/10

TOP LEARNINGS

- I worked really hard and tightly designing the enrollment because I had just attended a Mastermind that attempted a connect choreography without enrollment or instruction and I found it a flop—I'm celebrating this part of my work! As a matter of fact, this group was so resistant, to the topic & the delivery method, I needed to enroll in the legitimacy of the workshop and my deviation from the lecture format. I did not set the expectations with the participants, before the meeting. I will do this next time.
- My biggest learning was to create more time around the paired interview. Ten minutes was not enough. I feel like I enrolled them well in the activity and we just need to create more time to allow the paired interview to percolate a relationship. Next time, I will create more space for a relaxed interview session.
- Next time, I would like to bring my own tech person to the meeting. The breakout room situation was not as smooth as I've seen in our xchange environment. (Although, there will never be two Jana's—you are gold! Just sayin')
- Less is more! Although, some "expected" certification in the 90-minute session, 41 or the 45 participants gave amazing feedback and loved the small part of the content I provided. To be honest, I struggled with providing less content—this was a huge growth edge for me!
- I'm Celebrating that I created psychological safety well. I showed up both Brilliant and Imperfect!
- And, after reviewing the recording of the event, it was much better than my brain was telling me (beware of your own negativity bias!).

[Read the rest of Doreen's debrief and share feedback with her in our Facebook Group](#)

Learning Opportunities

UPCOMING PRACTICE SESSIONS

Practice Sessions offer the opportunity for live practice in the areas of Designing, Facilitating and Presenting, along with the opportunity to give and receive peer feedback in a structured way.



**JAN
18**

Facilitate
3-5 PM ET



**FEB
15**

Design
1-3 PM ET



**MAR
21**

Presenting
1-3 PM ET

- Everyone who joins will be invited to **“practice” based on the session theme** (Designing, Facilitating, Presenting) and **receive structured feedback** from other community members. The xchage Team will guide you on how to practice and then offer feedback.
- [Click here to RSVP](#) to the practice sessions you would like to attend.

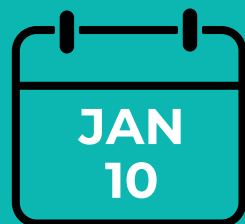
UPCOMING PROGRESS SESSIONS

Progress Sessions invite members clarify their most important priorities, gain inspiration from others and actually make "progress" through working sessions and mutual accountability.



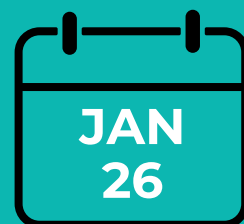
**JAN
8**

Co-Working
1-2:30 PM ET



**JAN
10**

Tech Lab
1-3 PM ET



**JAN
26**

Accelerator
12-1 PM ET

- Progress Sessions compose of 3 types of events: The Accelerator, the Technology Lab and Co-Working Sessions, all with the core goal of **helping you make progress** on your conscious facilitation journey through the space of a “working” session and shared accountability.
- [Click here to see upcoming Progress Sessions](#) in the Learning Lab and learn more about the upcoming Accelerator, Technology Lab and Co-Working Sessions.

Learning Opportunities

DESIGN STUDIOS

With the xchange Team

Included for Level 2 Members

Online group coaching on all aspects of the xchange Approach, led by the xc Team

JANUARY 4 | 1-3PM ET
JANUARY 25 | 1-3PM ET

DESIGN STUDIOS

With Jon

Included for Level 3 Members

Online group coaching on all aspects of the xchange Approach, led by Jon Berghoff

JANUARY 11 | 12-2PM ET
JANUARY 17 | 3-5PM ET

- This Group Coaching format will provide the opportunity for you to connect with and learn from other community members, have questions answered on designing and facilitating using the xchange Approach and see questions and agenda designs come to life in real time.
- Based on your membership level, stay up to date on all upcoming Design Studio Group Coaching events by:
 - **All levels:** [Click here](#) to see all of the prior Design Studio recordings with the xchange Team
 - **Level 2 & 3:** [Click here](#) for upcoming Design Studio Group Coaching with xchange Team
 - **Level 3:** [Click here](#) for upcoming Design Studio Group Coaching with Jon



MEMBER INSIGHT

“My first time attending at Design Studio and I really learned a lot about how to set up and design a session. I really enjoyed it and loved the learning. Thank you!”

— David McClennen

Unlock Collective Potential at Scale

Our free online facilitation training workshop for purpose-driven coaches, consultants, leaders, and more.



xchange 101 Transformational Facilitation Workshop

Friday, January 19, 2024 | 1:00 pm – 3:00 pm ET

Whether you're hosting an online meeting, training session, retreat, workshop, or event, xchange 101 introduces the foundational frameworks of our approach to unlocking collective potential — what we believe is the superpower of our generation.

Join us (and bring a friend or colleague!) to experience Jon share about how to:

- Shift any learning experience from passive to transformational
- Create a thriving group culture by enabling real safety and authentic connection
- Unlock the higher power of belonging, community, and collective potential in groups
- Have confidence in scientifically grounded, proven tools that get results
- Multiply your ability to create economic value and generate opportunities as a facilitator
- Deepen your fulfillment as you match your skills with the deepest human needs of our time

Grab Your Spot and Invite Others With This Link:

xchangeapproach.com/xchange-101

Upcoming Events

All Levels | Levels 2 & 3 | Level 3

JAN

- 4 Design Studio, 1-3pm
- 8 Coworking, 1-2:30pm
- 10 Tech Lab, 1-3pm
- 11 Design Studio with Jon, 12-2pm
- 17 Design Studio with Jon, 3-5pm
- 18 Practice Session (Facilitate), 1-3pm
- 23-25 ACLE
- 25 Design Studio, 1-3pm
- 26 Accelerator, 12-1pm
- 31 Adv. Training: Bus. Dev. 12-4pm

FEB

- 5 Coworking, 1-2:30pm
- 7 Design Studio with Jon, 12-2pm
- 14 Design Studio, 1-3pm
- 15 Practice Session (Design), 1-3pm
- 21 Adv. Training: Design & Facilitate, 12-4pm
- 22 Design Studio with Jon, 12-2pm
- 23 Accelerator, 12-1pm
- 27 Guest Mentor, 2-3:30pm
- 29 Design Studio, 1-3pm

MAR

- 4 Coworking, 1-2:30pm
- 7 Design Studio with Jon, 12-2pm
- 12-14 OXE
- 19 Design Studio, 2-4pm
- 20 Design Studio with Jon, 2-4pm
- 21 Practice Session (Presenting), 1-3pm
- 27 Design Studio, 1-3pm
- 29 Accelerator, 12-1pm

APR

- 3 Guest Mentor, 2-3:30pm
- 4 Design Studio with Jon, 12-2pm
- 8 Coworking, 1-2:30pm
- 10 Tech Lab, 1-3pm
- 17 Design Studio with Jon, 2-4pm
- 18 Practice Session (Facilitate), 1-3pm
- 19 Design Studio, 12-2pm
- 24 Adv. Training: Presenting, 12-4pm
- 25 Design Studio, 1-3pm
- 26 Accelerator, 12-1pm

MAY

- 2 Design Studio with Jon, 12-2pm
- 6 Coworking, 1-2:30pm
- 8 Ask/Give Experience 1-3 pm
- 9 Design Studio, 1-3pm
- 15 Design Studio with Jon, 2-4pm
- 16 Practice Session (Design), 1-3pm
- 22 Adv. Training: Design & Facilitate, 12-4pm
- 23 Design Studio, 12-2pm
- 30 Design Studio with Jon, 12-2pm
- 31 Accelerator, 12-1pm

JUNE

- 4-6 OXE
- 10 Coworking, 1-2:30pm
- 12 Design Studio with Jon, 2-4pm
- 13 Practice Session (Presenting), 1-3pm
- 20 Design Studio, 1-3pm
- 26 Tech Lab, 1-3pm
- 28 Accelerator, 12-1pm
- 28 Design Studio, 1-3pm

[Visit the Learning Lab to RSVP](#)

Inside the xchange Community

Stay connected with xchange and fellow members by giving and receiving value in our [private Facebook Community](#)

Member [Rachel LaForgia](#) has an exciting **#ask** to gather in person in the NYC/NJ/tri-state area for a design day - get on her list [\[here\]](#).

A generous tech skill **#give** from member [Dale Young](#) - to respond and receive support from Dale click [\[here\]](#).

Member [Celeste Elsey](#) shares some love and **#praise** for a meeting with fellow xchangers in the education sector. Click [\[here\]](#) to see their smiling faces!

An inspiring **#win** from member [AlinaJoy DuBois](#) and the quick action she took in follow up to attending our Accelerator Session. Help celebrate AlinaJoy [\[here\]](#)

Power of Community

Michael Diettrich-Chastain

xchange member since 2019



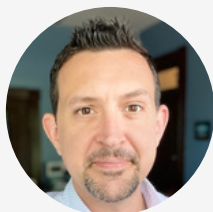
AT A GLANCE

Opportunity

Deepen relationships with xchange peers

Outcome

A new partnership with Peter Katz and Ron Hill, and a new business offering (Conscious Leader's Quest) that aligns directly to our strengths and desires is born



Michael Diettrich-Chastain

Founder & CEO, Arc Integrated

FOUR STEPS TO CREATING OPPORTUNITY

Focus on Relationship Building via Connection Calls

Michael began by engaging in open connections calls and meeting fellow xchange members during event breakouts

Be of Service and Listen for Resonance

During his connection calls, Michael highlights the importance of finding opportunities to be of service to others by first listening for any resonance between one another


Agenda and Business Design


In a conversation with Ron Hill, Michael aligned with the vision to hold destination retreats for conscious leaders. Together with Peter Katz they began designing this vision and finalized the design during our in-person Design Summits.

Conscious Leaders Quest is born!

Michael, Peter and Ron have built a partnership where they hosted their first destination retreat in Costa Rica. They plan to host a second retreat in June 2024.

RESOURCES

 [Event #DEBRIEF Facebook Post](#)

 [Event #DEBRIEF in Learning Lab](#)



Celebrating Our 2023 Certified Guides



**Robert
Murray**



**Reizel
Larrea-Alvaez**



**Fred
Bunsu**



**Sheila
Siden**



**Glenda
Lopez**



**Sky
McLaughlin**



**Gina
Couture**



**Sam
Neylan**



**Andrea
Ames**



**Taryn
Laakso**



**Cornelia
Shipley**



**Seth
Mansur**



**Kit Brown-
Hoeskstra**



**Thomas
Johnston**



**Marni
Task**



**Cynthia Gene
Maloney**



**Rachel
LaForgia**



**Stephanie
Postma**



**Sherilyn
Trompetter**



**Andrea
Carpenter**



**Karishma
Desai**



**Nozomi
Morgan**



**Tina-Marie
Minar**



Learn more about becoming a Certified xchange Guide [\[here\]](#).

Questions or need support on your conscious facilitation journey?
Want to share what you would love to see in future issues of the Facilitator's Field Guide?
Email membership@xchangeapproach.com

In gratitude, Stephanie Courtilier

