

Topical Roundtable Discussion

The purpose of Topical Roundtable Discussions is to share information on topics of mutual interest to Forum members. In this process, people share experiences and viewpoints, and they learn from each other. Ultimately, it raises the take-away value of Forum meetings.

Snapshot Guidelines

1) Preparation

- a) The group decides on a topic of mutual interest, or an individual person requests a Topical Roundtable Discussion to address one of their own issues.
- b) One person “owns” the topic and creates a list of questions related to the topic.
- c) The questions are circulated to the Forum, preferably one month in advance, so that everyone has time to gather their answers.
- d) Everyone prepares answers to the questions and brings them to the next Forum meeting.

2) The Topical Roundtable Discussion Process

- a) Determine how much time will be allotted per person and assign a time-keeper.
- b) One at a time, each person shares their answers to the questions. (3 to 8 minutes per person)
- c) The Forum may engage in a short Q&A to clarify information after someone shares his or her answers. (1 or 2 minutes per person)
- d) Then, continue to the next person and let them share their answers.



3) Conclusion

- a) The Forum engages in a short discussion to debrief on the take-away value of the process. For example, each person could share their best take-away from the session.
- b) Discuss whether additional action is needed on this topic.

Moderator/Facilitator Role

- Be sure the questions are distributed in advance and everyone prepares their answers in advance.
- Keep the process moving. Stay on time.
- Listen for possible presentation topics or follow-up discussion.
- If the conversation veers off-track, interrupt/knock to pull it back on topic.
- Consider making a list of potential topics for the year and insert a Topical Roundtable Discussion once a quarter.

Examples

- marketing plan
- management style
- employee reviews
- employee benefits
- sales process
- exit strategy
- work/life balance
- family relationships

Topical Roundtable Discussion, continued

Sample #1 – Sales Cycle

Answer the following questions on your own before the Forum meeting. Then, prepare to share your thoughts with your Forum.

Questions

- 1) What is your sales process?
- 2) How do you find leads? How do you qualify leads?
- 3) How long is the typical sales process, from first touch to closing the sale? Is the timing adjustable? If so, how?
- 4) How many of your customers are repeat customers, i.e. what is your customer retention rate?
- 5) What types of customer satisfaction monitoring do you do?
- 6) Describe your sales staff – how many people and what roles are they in?
- 7) Do you provide sales training?
- 8) What is the basic commission structure?
- 9) How do you handle a salesperson who is not doing well?

Notes / Follow-up

Topical Roundtable Discussion, continued

Sample #2 – Sales Cycle

Answer the following questions on your own. Then, prepare to share your thoughts with your Forum.

Questions

- 1) What type of health insurance benefits do you offer your employees?
- 2) What other types of benefits do you offer your employees? Describe the benefit.
- 3) Who are your vendors and how much do you pay for each of your employee benefits?
- 4) How do you handle time off, vacation time, sick time, personal time, funerals, maternity leave, etc.?
- 5) How important do you think employee benefits are to attracting and retaining employees at your company?
- 6) Do you have a Policies and Procedures manual for all employees?
- 7) What is the most challenging H/R problem you have faced to date?

Notes / Follow-up