



# WELCOME TO SQUADS Spring 2024

A Guide to Getting Started

March 2024



# Your Ellevate Membership

Your membership includes programming to support you through all stages of your career.

**Roundtables:** Expert-facilitated, hour long sessions where you'll dive into a topic and your specific challenges with other members who are going through similar experiences.

**Squads:** A group of 6-8 women from your program who you'll meet with for 12 weeks to get unstuck, get feedback, find new ideas, and build the confidence you've been looking for.

**Community Circles:** Compassionate spaces to come together, be heard, be seen, and celebrate our intersectional identities.

**Monthly Local Meetups:** Connect with members in your local Chapter for coffee chats, happy hours, book clubs, and more!

## **Executive** Roundtables & Squads Discuss:

- Landing the Board Opportunity
- Remote Team Motivation, Productivity, and Culture
- Finding Your TED Talk

## **Entrepreneur** Roundtables & Squads Discuss:

- How to have Authentic Sales Conversations
- Replacing Your Salary as a Coach or Consultant
- Writing a Book to Supercharge your Business & Brand

## **Rising Leader** Roundtables & Squads Discuss:

- Becoming the Manager People WANT to Work For
- Building Your Influence Within Your Company
- Knowing When and How to Say No

*"Getting an outside professional perspective is so amazing when it comes to imposter syndrome & confidence. I hate networking events, but Squads are wonderfully intimate and allow, even encourage, vulnerability."*





# THE SQUAD PROGRAM





# Spring 2024 Squads Calendar

## Kickoff (First Meeting)

- Week of **April 1st, 2024**
  - Your Squad will meet on the same day/time each week

## Hot Topic Discussions

- Starting on the week of **April 8th, 2024**
  - Your Mod will help decide on a Hot Topic based on a curated list in our Support Center


## Hot Seats

- One a week starting the week of **April 15th, 2024**

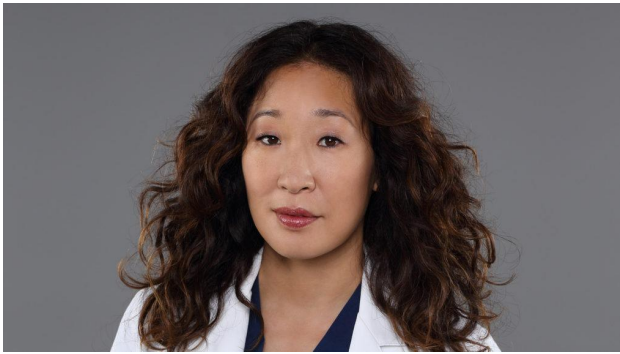
## Retrospective (Last Meeting)

- The last meeting will take place the week of **June 17th, 2024**





# **THE SQUADS EXPERIENCE: Meet a Rising Leaders Squad**



Cristina Yang - **Squad Mod**



Annalise Keating



Alexis Rose



Elaine Benes



Princess Leia



Olivia Pope



Mindy Lahiri



Elle Woods



Rachel Green

# Using the Goals Worksheet

Before we're ready to activate the Squad - and before everybody meets each other - each member started filling out their own Squad Goals Worksheet:

1. **Cristina:** Become the executive director of a cardiovascular research institute
2. **Annalise:** Continue to build my legacy teaching students about the Law
3. **Alexis:** I want to move up in my PR company, but I'm not ready to branch out as a PR business owner just yet
4. **Elaine:** Navigating my recent promotion in the publishing industry
5. **Leia:** Be more confident in the male dominated industry I'm in
6. **Olivia:** Starting to brainstorm ideas for my Presidential campaign!!!!
7. **Mindy:** Looking to stand out in the boy's club at my medical practice
8. **Rachel:** I feel stuck in my current position in the Fashion industry
9. **Elle:** I want to prove my worth at my law firm. I feel like I'm not taken seriously



# Goals Worksheet Preview

## Ellevest Squad Goal Worksheet

### Introducing Yourself to your Squad

*How would you describe your life in three sentences?*

*What parts of your career are you the happiest with? Which parts would you like to see change? Why?*

*What is the best thing you learned in the last year? What would you like to learn this year?*

### Career Self-Reflection

*What do you think are your top three strengths?*

- 1.
- 2.
- 3.

*What skills do you want to use more of in your career?*

*What brings you the most joy in your life and/or career?*

- 1.
- 2.
- 3.

*What types of problems do you most like to solve?*

All Worksheets are available in our Squad Support Center at [support.ellevestnetwork.com](https://support.ellevestnetwork.com)






# Intros and Kickoff Meeting



Once we activated this Rising Leader Squad...

- Everyone in the Squad immediately received an email notification with the subject line: ***Your Squad is Ready!***
- The email includes:
  - A direct link to the Squads Dashboard, accessible upon logging into their Ellevate account
  - A direct link to the Group Conversation, allowing members to communicate asynchronously between meetings
  - A direct link to an optional pre-program survey, to help the Ellevate team keep a pulse on topics that are top of mind for participants
  - Direct link to the Squad Goals Worksheet, available in the Squad Support Center
- The Squad Mod receives direct links to instructions on how to create and add the Zoom link to the Squads dashboard, send calendar invites, etc.



# Squads Dashboard Example




Events ▾Community ▾Membership ▾Resources ▾For Employers ▾

## Your Spring 2022 Squad

Welcome, Squad Mod!

[Message Your Squad](#)


Your Squad Mod: **Samantha Schwarz**



**Samantha Schwarz**  
New York, NY

Chapter HQ  
VP Customer Success at Ellevate Network


[View My Messages](#)



**Jess Matley**  
Los Angeles, CA

VP of Program and Event Operations at Ellevate Network

[Start a Conversation](#)

Your Squad Meets:  Friday, Apr 8, 2022 9:00 AM EDT ▾

[Click to Join the Meeting](#)

[Preview Meeting Invitation](#)

[Edit Curriculum](#)

Friday, Apr 8, 2022 9:00 AM EDT: Mandatory Kick-Off

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I want to talk about Baby Yoda!!

Friday, Apr 29, 2022 9:00 AM EDT: Pranita Balusu's Hot Seat

Friday, May 6, 2022 9:00 AM EDT: Jess Matley's Hot Seat

Friday, May 13, 2022 9:00 AM EDT:

Let's focus on leadership for this meeting.

Friday, May 20, 2022 9:00 AM EDT: Samantha Schwarz's Hot Seat

I would like to talk about a promotion.

Friday, May 27, 2022 9:00 AM EDT: Myra Robinson's Hot Seat

Friday, Jun 3, 2022 9:00 AM EDT: TBD


Friday, Jun 10, 2022 9:00 AM EDT: TBD

Friday, Jun 17, 2022 9:00 AM EDT: TBD

Thank you for all you're doing to support your peers as a Squad Mod!

Squad Mod Setup Center

If you have any questions, you can reach out directly to [squads@ellevatenetwork.com](mailto:squads@ellevatenetwork.com).

**Questions?** Check out the [Squad Information Center](#) 




*What's the agenda for each call?*  
*How can I prepare for my Hot Seat?*  
*What if I can't make it to the call?*  
*What Hot Topics can we add?*



**Ellevate Squads Code of Conduct**  
Squads are a confidential space for you to support each other, to share your goals and challenges, to celebrate your wins, to clear your roadblocks and to hold one another accountable. Please keep [Ellevate's Values](#) in mind - be respectful, value the diversity of the group, practice gratitude, and search for action-oriented solutions.

How to Prepare for Your Hot Seat  
Your Hot Seat is your opportunity to focus on what's important to you, ask the questions that keep you up



# Group Conversation Example

Events ▾Community ▾Membership ▾Resources ▾For Employers ▾

Inbox  

**You, Hilda Gan**

Samantha - are you the person for the Squads. I have been asked to be a Mod and I keep responding to the emails but it seems they are not reaching any...

**Karen Mildenhall, You**

Hi Karen - you're very welcome! :) Have a wonderful weekend! - Samantha

**You, Trish Golas**

Hi Samantha, Happy Friday to you too! Thanks so much for getting back to me. We can chat more live, but briefly, I have been developing consumer produ...

**Jo-Ann Daddio, You**

Greetings Samantha, I'm in a squad this time led by Rhonda Farrell and I have some feedback that I'd like to give you regarding this moderator. Would ...

**You, Raja chandrasekharan**

Hi Raja - This is Samantha from the Ellevate team. Reaching out because a few of your Squad members wanted to check in and make sure you are okay....


To: 


Jess Matley ✕


Myra Goodine ✕


Pranita Balusu ✕


Sam Giannangeli ✕


 **You** • Mon, Mar 21 12:28PM  
I am excited to meet all of you!


 **Myra Goodine** • Mon, Mar 21 4:07PM  
I am excited to meet you too... in our All Hands meeting tomorrow! Haha!

 **You** • Tue, Mar 22 3:30PM  
Me too!

 **You** • Mon, May 2 5:31PM  
this is a test...you can ignore this message.

 **You** • Mon, Aug 15 12:26PM  
Hi Squad!!

 **Myra Goodine** • Mon, Aug 15 4:29PM  
What up, what up???????????????



Let's talk more at our upcoming Squad meeting

**Jess Matley**

VP of Program and Event Operations, Ellevate Network  
Los Angeles, CA  
[Ellevate Profile](#)

**Myra Goodine**

Chapter Program Manager, Ellevate Network  
[Ellevate Profile](#)

**Pranita Balusu**

Program Manager, Ellevate Network  
[Ellevate Profile](#)

**Sam Giannangeli**

— has left conversations.  
HR Wrangler (Global HR Business Partner), Automattic  
Earlysville, VA  
[Ellevate Profile](#)

Send





# For Squad Mods: How to Setup Your Squad

1. **Setup the Zoom meeting URL:** We recommend doing this shortly after you receive the email confirmation that your Squad is activated
2. **Say “Hello” in the Group Conversation:** Get everyone comfortable by saying “hello” and sharing a little bit about what you expect from the Squads experience. The more you model communication early on, the easier it will be to keep the conversation going.
3. **Bookmark the Meeting Agenda Templates:** In our Squad Support Center, we have templates to help you conduct each 30 minute Squad meeting. Bookmark these so that you can save time and make sure each meeting is run efficiently.





# Meeting Agenda Templates

[Solution home](#) / [Squads](#)

## Meeting Agenda Templates

### Overview: Squad Curriculum



Each Ellevest Squad meets for 12 meetings (30 minutes each week), always on the same day and at the same time. All Squad members will connect for the meetin...

Tue, 18 Jul, 2023 at 4:41 PM

### Hot Topics Meeting Agenda



During Week 2, and then later during breaks from Hot Seats, Squads discuss common professional challenges and questions. The goal is to collaborate on strat...

Wed, 26 Jun, 2019 at 12:30 PM

### Hot Seats Meeting Agenda



Each Squad member gets one week in the Hot Seat, where the whole call is focused on her goals and challenges. This ensures that meetings aren't all small ta...

Tue, 18 Jul, 2023 at 4:42 PM

All Meeting Agenda Templates are available in our Squad Support Center at [support.ellevestnetwork.com](https://support.ellevestnetwork.com)



# The Kickoff Meeting

- The Kickoff Meeting is the first of 12 Squad meetings.
- Before the scheduled meeting time, everybody should have introduced themselves in the Group Conversation and filled out the Goals Worksheet
- During the Kickoff the Squad members...
  - Will introduce themselves, their goal, and reason for joining the Squad.
  - Clarify communication expectations with one another
- Before you end the meeting, decide on a Hot Topic for the following week
  - Browse the Hot Topic options in the Support Center
  - **Example: Setting Boundaries at Work**
  - **The Squad Mod is responsible for updating the Squad curriculum with the details for the Hot Topic.**





# The Hot Topic Meeting

- **Before the second Squad meeting**
  - The Mod confirms the Hot Topic selection in the Group Conversation.
  - The Mod provides the link to the Hot Topic ***Setting Boundaries at Work*** to make it easy for the Squad to prepare for the discussion.
- **During their meeting:**
  - Mods make sure each Squad member shares lessons learned and has a chance to speak about their own experiences with setting boundaries
  - During the last 10 minutes of the discussion, the Mod has the Squad focus on outlining specific changes everyone could make in their professional lives to help with setting boundaries successfully



# Preparing for the Hot Topic

[Solution home](#) / [Squads](#)

## Hot Topics



### Hot Topics for Rising Leaders

Prepare for your Hot Topic Discussion Look at the list resource for each topic. As you watch, listen, or read through the suggested resource, jot down your...

Mon, 13 Mar, 2023 at 10:53 AM



### Hot Topics for Entrepreneurs

Prepare for Your Hot Topic Discussion Look at the list resource for each topic. As you watch, listen, or read through the suggested resource, jot down your...

Mon, 13 Mar, 2023 at 10:53 AM



### Hot Topics for Executive Squads

Topic 1: Remote Team Motivation, Productivity, and Culture How to prepare for your Hot Topic discussion: Watch the short presentation and write down yo...

Mon, 13 Mar, 2023 at 10:54 AM



### Additional Hot Topics for All Squads

Prepare for your Hot Topic Discussion Look at the list resource for each topic. As you watch, listen, or read through the suggested resource, jot down your...

Mon, 13 Mar, 2023 at 10:55 AM







# Preparing for the Hot Topic

## Topic 1: Setting Boundaries at Work

**Read the Article:** [How to Confidently Say "No" At Work](#)

### Reflection Questions

- What is a boundary you need to put in place at work/in your job search?
- What is keeping you from setting the boundaries you need?
- Is there anyone you might be able to lean on in establishing boundaries?

## Topic 2: Overcoming Imposter Syndrome

**Read the Article:** [Overcome Imposter Syndrome With This Winning Poker Strategy](#)

### Reflection Questions

- Can you narrow down which aspect of your role/job search is causing you imposter syndrome, or is it an overall feeling of discomfort? Are you able to unpack that feeling?
- What are the facts about your career and what are the stories you've been believing? How do they differ?
- What reminders could you put in place to remind yourself of your worth?



# Squads Dashboard: Curriculum Column

[Events](#) ▾[Community](#) ▾[Membership](#) ▾[Resources](#) ▾[For Employers](#) ▾

## Your Spring 2022 Squad

Welcome, Squad Mod!

[Message Your Squad](#)

Your Squad Mod: **Samantha Schwarz**



**Samantha Schwarz**  
New York, NY

Chapter HQ  
VP Customer Success at Ellevate Network

[View My Messages](#)

**Jess Matley**  
Los Angeles, CA

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How to Prepare for Your Hot Seat  
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# Squad Mods: Curriculum Edits

Fill in the blanks and rearrange your Squad Curriculum as explained in the [Squad Information Center](#). If members of your Squad need to trade dates for their Hot Seats, you can edit this calendar any time. You may want to cancel Squad meetings for national holidays or other events; feel free to do so at your discretion.

Questions? [Open a Support Ticket](#)

## Your Squad Curriculum

Week 1: Friday, Apr 8, 2022 9:00 AM EDT

Mandatory Kick-Off

Notes

Week 2: Friday, Apr 15, 2022 9:00 AM EDT

Hot Topic Discussion: Setting Boundaries at Work

Notes

Before we meet, please read this resource: [LINK TO RESOURCE]

Reflect on the following questions:

Question 1

Question 2

Question 3





# Hot Seats

## The Squad Schedule of Meetings

Week 1: Kickoff meeting

Week 2: Hot Topic Discussion

**Week 3: Annalise's Hot Seat**

**Week 4: Rachel's Hot Seat**

**Week 5: Olivia's Hot Seat**

**Week 6: Princess Leia's Hot Seat**

**Week 7: Cristina's Hot Seat** (Mods get a Hot Seat too!)

**Week 8: Alexis' Hot Seat**

**Week 9: Elaine's Hot Seat**

**Week 10: Mindy's Hot Seat**

**Week 11: Elle's Hot Seat**

Week 12: Retrospective

## How the Squad Prepped for their Hot Seats

- The Mod always confirms the upcoming Hot Seat at the end of every meeting and in the Group Conversation
- A few days before a member's scheduled Hot Seat, they complete the Hot Seat Worksheet.
- Next, the Hot Seater summarizes their main goal/questions in the Group Conversation. They complete this ~24 hours in advance of their Hot Seat.
- The rest of the Squad reads the summary before the upcoming meeting.







# Hot Seat Prep: Resources

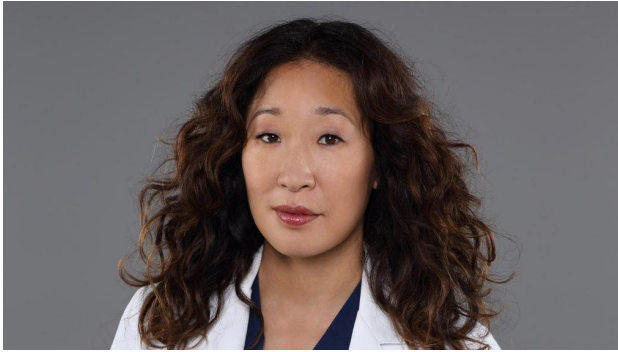
**Hot Seat Worksheet:** [support.ellevatenetwork.com](https://support.ellevatenetwork.com)

**StrengthsFinder:** <https://www.gyfted.me/personality-quiz/strengthsfinder-test-free>

**Best 23 Self-Assessment and Self Reflection Exercises:**  
<https://coachfoundation.com/blog/self-assessments-and-self-reflection-exercises/>

**Powerful Coaching Questions for Your Career:**  
<https://gritandvirtue.com/25-journal-prompts-powerful-coaching-questions-for-your-career/>





I want to open up a cardiovascular research institute after being in healthcare for 10+ years - I feel stuck in this journey and I don't know where to begin. I'm overwhelmed!



I need help with my confidence building - I work in an extremely male dominated industry and I don't feel heard. You're my only hope!



I want to continue working on building my legacy in the law and eventually open up my own law firm - but I don't know how to even get started.



I just got promoted at my publishing firm, but I need help navigating it. I think I have imposter syndrome.



I have the ultimate dream of opening my own PR consultancy - but I feel stuck at my current PR role on top of working at my family's hotel - I so need to work on my boundaries with them.





As women in the workforce, what are the top issues you would like to see addressed by the next President? Why are these issues important to you? What considerations do you take into account when casting a vote for a government official?



Maybe I should take a public speaking course? I feel like my style of public speaking needs to be different at the office and the courtroom. Any suggestions for where to start?



Right now, I am the only female doctor in my medical practice. What advice do you have for making sure that the men on my team listen to my ideas? What can I change to make sure I am heard by my male colleagues?

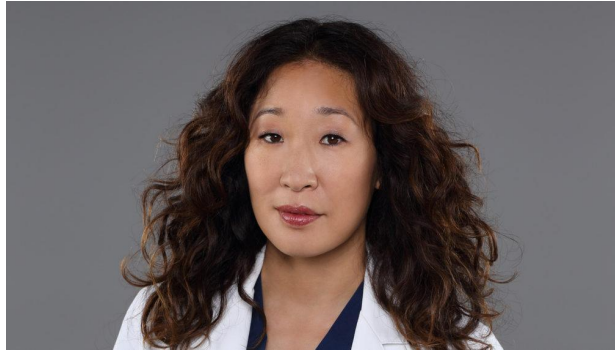


Can we workshop my resume? I feel like I could get a much better job (and make more money) if I knew how to sell myself better to a new employer.



# Hot Seat Discussion Questions

Do you have a vision statement to share with potential sponsors? How would you appeal to them to get their support?



I want to open up a cardiovascular research institute after being in healthcare for 10+ years - I feel stuck in this journey and I don't know where to begin. I'm overwhelmed!

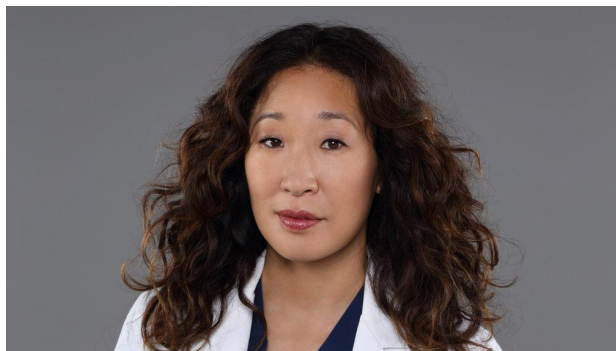
What steps have you taken to meet people with experience running or launching a non-profit?

What are some skills that you know you need to accomplish this goal? What might you do to close the skills gap?

Who do you go to for support and advice outside of our Squad? What might you ask them to help get unstuck?



# Outcome from the Hot Seat



Without my Squad, I never would have been introduced to several experts in the medical research field.

- # I now have the support of 8 amazing women from my Squad, plus two new mentors who are helping me develop the business skills that are necessary to run a successful nonprofit organization.







# FAQ's

- **How does the Hot Seat schedule get created?**
  - Our website automatically generates a schedule when we activate your Squad.
- **Can Hot Seat dates be swapped?**
  - Absolutely! You are able to make edits - any change requests can be discussed at a Squad meeting or in the Group Conversation
- **How do I learn from other people's Hot Seats?**
  - Be an active listener during all Hot Seats
  - Take notes on advice that resonates with you - even if that advice isn't directed towards you
  - Come to every Squad meeting with an open mind





# Hot Seat Etiquette

Your presence is by far the best gift you can give someone in your life, and your Squad is no exception.

The success of the Squads program is directly correlated to the attendance and engagement from all members of the Squad.

This is a program that has impacted 15,000+ women over the last 6 years ... our data supports that attendance and active listening are the most important factors in helping participants feel fulfilled by the experience.

It's critical you make every effort to attend each member's Hot Seat, and engage with each one as if it were your own Hot Seat.

Just the simple act of showing up will go a long way in building long last relationships.



# Communicate schedule conflicts in advance

In our sample Rising Leader Squad, a couple of members communicated their schedule changes and conflicts before the Kickoff meeting:

- Leia sent a message using the Group Conversation tool to the Squad: *“I will be out of the galaxy during our Squad meeting on April 21st! Will be back the following meeting!”*
- Mindy also sent a message to the group: *“A patient of mine is running late, so I will be late or miss today’s Squad meeting, but will look at the notes to stay in the know!”*

## Real life FAQs for Mods

- **What happens if someone misses a meeting and forgets to send a message?**
  - Reach out 1:1 after the meeting to see what happened
- **What happens if I need to miss a meeting? Can I ask someone else to be the Mod for that day?**
  - Yes! We encourage you to ask for a substitute upfront so that everyone is clear on what they need to do to help the Squad move forward.





# Retrospective

**All good things must come to an end! This is the last official meeting for your Squad!**

- This is the perfect time to reflect on the past 11 weeks, sharing what you've gained from the Squad experience.
- Many Squads continue to meet after the conclusion of the 12 meetings. You can choose to meet monthly, bi-monthly, once a quarter...whatever cadence makes most sense to the members in your Squad.
- Lastly, if you have a really good story or insight experience, the Ellevate team would love to hear from you. You can share your feedback about Squads by writing to us at [squads@ellevatenetwork.com](mailto:squads@ellevatenetwork.com)



# A few reminders

1. **We'll start activating Squads this week** - so you won't see your Squad dashboard just yet
2. **Once your Squad is activated**, you'll get an email notification. Once you get that email, log into your Ellevest account, head to your Squads Dashboard, and introduce yourself using the 'Message Your Squad' button on the dashboard
3. You can find all the links we've shared in the **Squads Support Center** at all times





A blurred background image of a group of women, likely at a professional conference or networking event. They are smiling and appear to be engaged in conversation. In the top left corner, there is a teal graphic element consisting of two overlapping chevron shapes pointing right.

# QUESTIONS?



# **SQUADS DASHBOARD & MOD TOOLS DEMO**