## Lunch and Learns

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### What is a Lunch & Learn?

A Lunch and Learn is an event coordinated between a local HBA chapter/region and a company to raise awareness of HBA within an organization. HBA member leaders deliver these sessions to the company's employees to provide them with:

- An \ overview of HBA and its mission
- Introduction to HBA's local presence in that area
- Opportunities for professional development and how to get involved
- Events and programs
- Alignment of the HBA with the company's initiatives and priorities

The HBA Overview deck is a great place to start: About the HBA deck

# **Event Logistics**

Invitations and the promotion of these events are held entirely within the company and are not listed on the HBA website or open to outside attendees. These events are a team effort between the company, the region's Corporate Relations department, and the local chapter. The company handles most logistical planning, the Corporate Relations team guides HBA offerings, and the local chapter provides representatives to present HBA information onsite to the attendees.

HBA Lunch and Learns - Process, Key Insights and Best Practices.pptx @



#### **Lunch and Learn process** Contact Appropriate Chapter Request / Propose L&L Alignment Meeting #1 Alignment Meeting #2 CP Intake L&L Event If in region, proceed to contact appropriate CP opens HBA speakers Corporate Partner (CP) requests directly • HBA HBA speaker Complete or · CR runs Membership & Engagement DAL meeting runs meeting INTAKE FORM Review deck Discuss and share personal align on INTAKE FORM journey Determine Determine potential dates / times and availability for in-person chapter Membership & Engagement HBA Central or roles and speaking order including how / who will field • Conduct live other Review core deck and demo Corporate Relations (CR) region notifies Close with O&A DAL obtain input for If in another questions, how to conduct the live demo, etc. customization • CR proposes to CP region, contact appropriate CR President and • Determine need for polling transition logistics L&L Dates and Speaker Notify the CP that the HBA Speaker INTAKE FORM Objectives Presentation Customization CP Rising Star / Luminary pictures CP logo, membership level, activation codes (if applicable) will be virtual unless she agrees otherwise otnerwise Determine general timeframe from CP (e.g., preferred month, workday or afterhours) However, HBA Speaker drives dates / times Highlight appropriate chapters Include local educational and networking events with registration Include appropriate chapter contacts L&L (at least 6 – 8 weeks scheduling form time of request) #HBAimpact 2 Alignment meeting

#### Post-Event Follow-up

- Provide presentation with local chapter contacts and hyperlinks to promoted events
- Connect participants to appropriate local chapters
- Review enrollment and engagement with CP in subsequent cadence calls

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# **Key Insights and Best Practices**

AREA	KEY INSIGHT	BEST PRACTICES
Alignment	Need for standard approach across regions	Notify and connect with Corporate Relations counterpart in region     Conduct Alignment Meetings with all key stakeholders to confirm needs with CP including business partner(s) in region     Use core, customizable deck
Logistics	Smooth execution of event with a single point of contact in region	Transition "quarterbacking" of event to Corporate Relations President in region Stable of speakers familiar with core deck talking points At least 6 – 8 weeks scheduling timeframe
Engagement	Members are often bought into the HBA value proposition but do not know (1) how to get started or (2) more involved	Invite CP Rising Star / Luminary or other HBA advocate or champion to introduce event     All speakers describe personal HBA journey including career and personal benefits     Live demo of the website     Provide presentation with "Call to Action" slide, regional contacts, hyperlinks to local event registration, and activation codes
Follow-Up HBAimpact	Corporate Partners need additional follow-up to leverage the enthusiasm of the event and drive engagement at the local level	Connect CP HBA members with appropriate contacts in region Notify CR President responsible for primary CP relationship of any local L&L Consider tracking (e.g., like Programing Airtable)