PEM Process

Last Modified on 11/06/2024 5:37 pm EST

Step 1: Qualify

When an HBA Corporate Partner is eligible for a program, or when an existing Ambassador Program has expressed potential interest in launching additional program(s), it is important that the PEM, it is important to **Qualify** the customer.

For a PEM, this essentially means evaluating a potential customer to determine if they are likely to increase their program engagement by activating additional programs available in their partnership OR purchasing additional programs (purchases can be made here).

This is an important part of the business development process with the company to explore and expand their engagement not only with the program, but with the HBA. It is an opportunity to build the relationship with key contacts at the organization and explore the strategic possibilities the program can have on their organization.

If one of your assigned companies needs to be qualified: Conduct a discovery call: learn more about their needs and goals, share high level information about the program (see: GAP Teaser Deck with Quick Start Guide), ensuring you understand their current level of engagement (i.e. how many programs are currently running, how many are they eligible for in their CP package (see HBA Corporate Partner Information Module), and their budget/purchasing authority. Ensure you are clear about upcoming timelines (i.e. launch windows and deadlines)

The HBA's ultimate goal is to support all eligible HBA Corporate Partners in launching an Ambassador Program, and increasing engagement with existing companies wherever possible!

Step 2: Intro Discussions

Once an HBA Corporate Partner has shared verbal intent to launch a program, they may request an Intro Discussion to understand the needs and process. The needs here may vary from company to company, but may require sharing high level information about the program (see: GAP Teaser Deck with Quick Start Guide), ensuring you coverr about upcoming timelines (i.e. launch windows and deadlines), and even walking them through the Activation Toolkit so they understand what the needs are to get started.

During these conversations, you should be establishing that you will be their main point of contact long term for GAP across the company's programs. Also, you should be looking to identify any business development opportunities to expand company engagement or additional purchasing needs they would benefit from (such as Master Classes or Coaching from the Ambassador Learning Center, bulk memberships, etc).

Once the company has officially submitted their Activation Form, this indicates their intent to launch, and we move into the Support Launch Needs phase.

Step 3: Support Launch Needs

HBA Central will support all launching cohorts via our Champion Setup Series, which walks program Champions step by step through the program setup milestones,where to find and how to use program resources, and much more.

PEMs do not directly support program setup, but may be tapped to (optionally) attend meetings during this phase. Largely it is best to observe from afar, maintaining the overall company relationship without getting involved in the day to day details of the program itself.

PEMs can (and should if available) attend all or part of the program launch to get a good sense of the cohort, their goals and plans.

Step 4: Regular Check-Ins

While your primary responsibility is maintaining the overall relationship between the company and GAP, one of the ways to do that is ensuring satisfaction across their program(s). Once your program(s) have launched, the PEM's should ensure things are running smoothly which is easily done via regular check-ins with the program Champions and Advisors (separately, to ensure they have a safe space to share what's working, what's not, and escalate issues).

The HBA will in future look to automate these check-ins via pulse survey, but they can be easily handled via direct email. It is recommended to check in more regularly in the first 3 months of the cohort, followed by quarterly.

Below are some suggested questions, which can be modified/tailored as needed. Ultimately the goal is to gauge how things are going (not just on the surface), proactively identify challenges, problem solve, or escalate major issues outside your level of comfort to HBA staff.

- Is all going well with the [Advisors or Champions]?
- Is there involvement with the Executive Sponsors? Are there opportunities to engage them more?
- How is the engagement and participation of the cohort Ambassadors?
- Are the workgroups experiencing progress and/or challenges with their initiatives?
- Are there any HBA offerings or components you're interested in connecting with or hearing more about to enhance your experience?
- Is there anything else that HBA could do to support you?

Step 5: Re-Launch Discussions

Approximatly three months prior to the end of the program is the best time to explore re-launching the program and expanding engagement with the company. At this time, it is best to schedule a meeting with your key program contact to discuss what went well and what the opportunities are for the future (see tools in Step 1: Qualify).

You will also want to connect with the HBA account manager for the company regarding the HBA Corporate Partnership status at this stage to ensure they are aware of any pertinent program feedback. If the company still has programs as a part of their partnership, then relaunch discussions can continue. Increasing the engagement and number of programs to enhance the company's experience and develop their employees is always the goal!