

# Corporate Relations Best Practices

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Here is a collection of some corporate relations best practices shared by member leaders and staff:

## Know Your Company Landscape

- Identify and log all HC companies across your region; engage your local chapters to aid in this effort
- Identify a key contact and or champion at each of your corporate partner sites
- Leverage the [CP Info Module](#) to log all your company data (or create an spreadsheet CRM for your team)
- Have an introductory session with each corporate partner in your area to understand how to engage their site and their employees
- Proactively offer a [Lunch & Learn](#) so the employees get to know the HBA and how to make the most of their membership

## Know Your Resources

- Explore the [CP info module](#) for current corporate partner benefits and aid in populating locations info
- Check the CP list regularly, it's posted every month to the CR Community page for CR member leaders!
- Read the [Inside the HBA newsletter](#) for important HBA updates
- Understand [HBA's sponsorship grid](#), how to position to a company, and benefits fulfillment so you can support your programming teams and needs
- Ensure your TEAM is trained using HBA's resources & knows how to sell the HBA value proposition

## Build Your Team

- Aim to have a lead or committee dedicated to every location in your area.
- Having presence in areas where CPs have locations is KEY to engagement and enhances the

global partnership

- And follow the proper HBA process – this helps the HBA Central account management team to connect with the right people correctly!
- If you have team turnover, provide proactive introductions to the AM team and CP contacts to hand over the relationship
- Solicit volunteers from each of your CP locations to be on your team/your direct contact for continued engagement and sponsorship needs
- Ensure the CR regional lead is directly connected to each of your locations' leadership teams, including attending board meetings, so they're 'in the know'

## Work with Account Management

- Need to connect with an Account Manager? Use the 'schedule a call' link in their email signature!
- Understand the **AM role**:
  - They are responsible for the GLOBAL relationship with each partner, including engagement and renewals
  - HBA Central event sponsorship is part of their role and critical to the success of HBA Central Events, so very important to align and not step on toes as some companies have finite budgets
- HBA Central Business Development is working with new CPs to identify the kind of ops that they're interested in engaging with – why are they here – so we can better identify where regions/locals should be involved!
- Supporting the CP relationship:
  - Ask the account manager: what does the company need and how can your team best support.
  - Share ideas and be proactive sharing opportunities
  - Participate in cadence calls when invited (optional – monthly/bi-monthly/quarterly). Come prepared with a list of opportunities that are available in your region/applicable location. Share EARLY stage plans/opportunities. It can aid in global strategy development!
  - If you can't be on live, share to Account Managers your regional/local opportunity in planning/highlights with info, and key events/opportunities that are already open with active links. Getting it into the AM team's hands helps them get it out more easily
- It's a two-way street – feel free to invite the account manager to local calls/events with CPs!
- Remember: new CP list is posted monthly to the CR Community!

# Global Engagement Strategy Support

- Building relationships with LOCAL CP contacts is VERY HELPFUL!
  - If a CP key contact goes dark (a key reason for non-renewal), these can be used as alternative contacts
  - Prevents key contact outreach/overload – many global contacts do not like to be contacted w regional/local opportunities
- Lunch & Learns – KEY to engagement!
  - Lunch & Learns are a KEY engagement tactic for companies AND employees, ensuring the HBA name, brand, benefits, etc are front and center across sites and companies.
  - Proactively initiate L&Ls for local sites to really drive value and create relationships that can support your local/regional objectives
  - For companies who don't want a L&L or event, member leaders can just do a quick 1:1 call or small group informational call
  - If a company is asking to host one across sites, collaborate with your peers and stick to more general HBA benefits!
- Data is critical
  - Log whatever data you can in the CP Info module, which is saved in HBA's database. This can inform major event plans, support planning, and ensure knowledge transfer when teams roll over

## Event Sponsorship

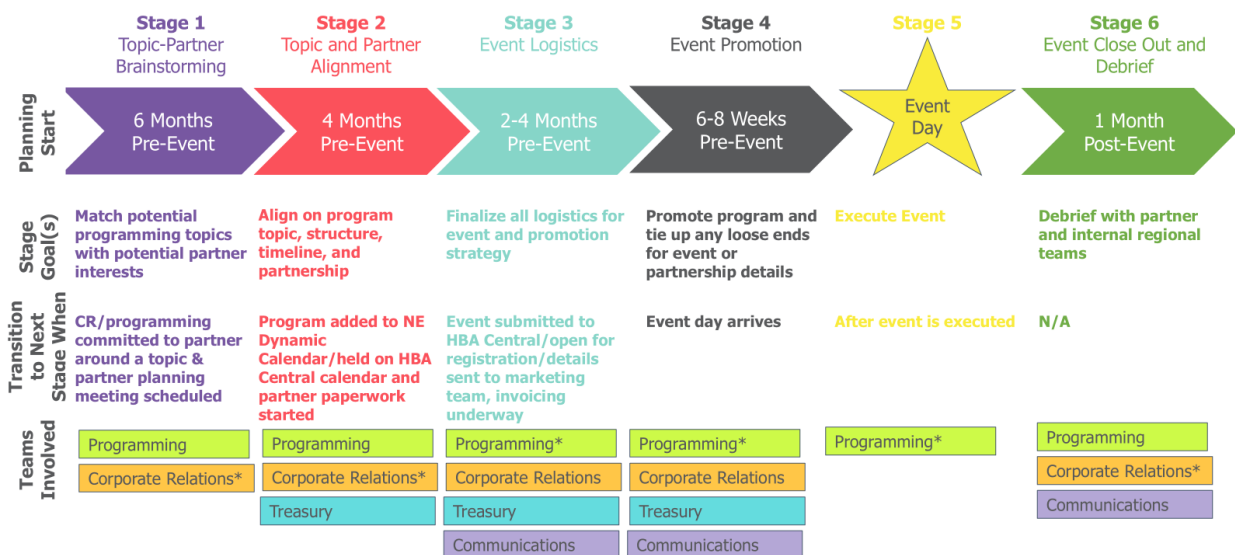
- SUMMER is the time of year where you should be connecting with your regional and local **programming teams** to think about plans for next year. Ensure you also understand **HBA Central flagship timelines and opportunities**
- Proactively provide a list of the companies who may or may not want to engage with the HBA through sponsorship
- Work with all of your companies to identify the kinds of topics that they would be interested in supporting via sponsorship
- Share the trends that you are seeing in terms of programs and topics for the future to inform their planning
- Connect with your corporate partner sites now to identify their plans for next year and inform their budget planning.

- Request a list of topic/content ideas from your HBA programming team to share with companies, but be very open to modifying and adjusting topics based on what the company is interested in and what their priorities are.

- In an ideal world, you have a solid sense of the companies in each location that are willing to sponsor a program next year by Q4 of the year prior! You may not have the program fully flushed out, but having general commitment and timeframe and topic identified can fully inform Your teams programming plans, and set them up for success.

- Remember, it is your teams responsibility to solicit sponsors, but you need to be in close contact with programming in order to pull things through!

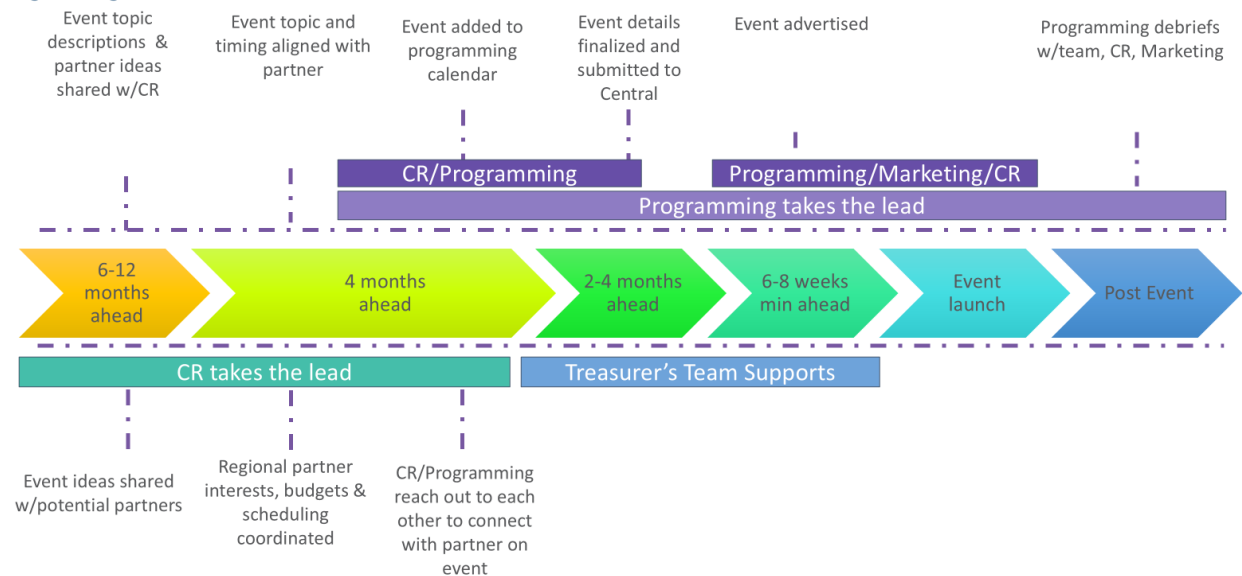
## Sponsored Event Planning and Execution Process



\*Lead for the given stage

# Programming / CR Collaboration for Event Execution

## Programming



## Corporate Relations