1. PURPOSE

This document outlines HBP’s approach to planning and delivering face-to-face sessions with best practices and tools from the initiate through delivery phases. Best practices are informed mainly by delivery of our SL CUS offering, but can apply cross-offering as well, on a case-by-case basis.

This document also includes links to the key templates and tools you’ll need to design, develop, and deliver a face-to-face session.

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| Syllabus |
| FOBS |
| Kick-off |
| Kick off |

1. BACKGROUND

Review these guidelines at the start of your engagement and reach out to other colleagues who’ve delivered face-to-face sessions with any questions.

If the DS has not yet delivered a face-to-face session, he/she should let the PM know to receive training as needed by the PM throughout the engagement, including pairing the DS with a DS buddy who has experience with face-to-face sessions at HBP.

1. DELIVERY TEAM GUIDANCE

* Face-to-Face Process: Initiate

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| **Overview** | The goal of this phase is to acquaint yourself with the pricing, expected deliverables and client expectations |
| **Read the SOW** | Focus on understanding the deliverables owned by HBP and deliverables owned by the client for the face-to-face session. If you see something that doesn’t make sense or raises a red flag, such as promised delivery dates or duration/locations, talk to the project PLP. |
| **Conduct internal transition meeting** | Make sure you learn about the RM and PLP positioned the face-to-face session, such as these topics:   * Fees. How much are we charging? Check PSA to make sure the milestones are set up correctly * Dates and duration. Were specific dates or an event duration discussed? Get a sense of the client’s timeline – it takes more time to onboard a face-to-face module than it does to onboard a virtual module * Content. Will the face-to-face event include Harvard content only or will there also be client-led content or other vendors involved? If another vendor is involved with the event, you will need to consider the best way to arrange the agenda, i.e. front or back-loading the Harvard content, as well as work with the client to facilitate a smooth transition * Client expectations. Has the RM begun setting expectations for mutual responsibility for face-to-face delivery? HBP does not own logistics and the client team must have a person assigned to manage logistics |
| **Conduct client kickoff** | There are two important things to clarify with the client:   * The client’s goals for the face-to-face event--what they hope to get out of it and how they envision it running * Mutual responsibility for the success of the face-to-face event. HBP is a content provider and doesn’t charge for or maintain direct responsibility for the logistics of a face-to-face event. However, we recognize the importance of being a partner and take an advisory role about logistics to ensure a successful event. Logistics are defined as venue selection and management, catering, A/V, printing, scheduling, travel, & accommodation |
| **Update the Project Plan** | Include a specific section for face-to-face onboarding tasks in your plan. Encourage your client to contribute logistics tasks in the plan for ease of project management. Though we don’t own event logistics, we do act as an advisor, sharing recommendations for things like agenda timing, seating (i.e. randomized or by study group), involvement of senior leadership and stakeholder groups, and the technical support they need to engage |

* Face-to-Face Process: Design

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| **Overview** | The goal of this phase is to confirm the dates and high-level content. |
| **Set the dates** | Work with your client to set the dates of the event, making sure that they confirm the venue and all elements needed to run the event (i.e. breakout rooms, catering, technical support, accommodation and travel considerations, etc.).  Note: We charge clients for changing dates once they’re confirmed. |
| **Confirm or create learning objectives** | If learning objectives have already been completed as part of the overall program design, confirm that they are still valid for the face-to-face design. If the face-to-face session is part of an add-on, then create and confirm new learning objectives. |
| **Draft the high-level agenda** | You can use the [**Windowpane Agenda**](https://hbp.box.com/s/lnhjan5mpoqpjxoq4wbr0dl4omjpbd4n) template to create a snapshot of the event that includes start and end times for each day; self-paced assignments; and session titles and speakers. This view of the agenda helps you co-create and align with the client before getting into more detail. You can also use the final version as the learner-facing agenda.  Use these guidelines in developing this agenda.   * Face-to-Face sessions are typically priced for 1.5 days. * Welcome & Introduction takes between 30 -60 minutes and includes program or module overview and icebreaker. * Context Setting sessions are 90 minutes. * Thought Leader sessions are 90 minutes delivered virtually unless otherwise determined at the time of sale. * Case Study Discussions are 2 hours to allow for an element of study group work. * App Exes and sims are 2 – 2.5 hours to allow for three blocks of time: Introduction, Play, and Debrief. * Daily Wrap-Up takes 15 – 45 minutes depending on if you’re leveraging Study Groups and/or asking participants to reflect in journals or via a post-it activity. * Program Module Wrap-Up takes 15 – 45 minutes depending on the module of the program (final module requires more time). * Allocate 5 – 10 minutes at the end of each day for participants to fill out their daily evaluation in the room before they leave for the day. |
| **Review the high-level agenda with the client** | As you review the agenda with the client and update it as needed, discuss these questions:   * Is HBP’s content stand alone or will it take place as part of a larger event? If it is part of a larger event, front- or back-load the content rather than sharing days. The client is responsible for creating the agenda for all non-Harvard-led days. * Who from the client-side needs to be present? Have your client contacts blocked their calendars? * Who will do the welcome from the client-side (i.e. Program Sponsor, CEO, etc.)? Who will close? * If you have an HBP thought leader joining virtually, how will that person join (i.e. via WebEx with projection or Telepresence)? * Has your client blocked the calendars of the co-moderators? |

* Face-to-Face Process: Develop

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| **Develop** | During this phase you will partner with the client to develop content, logistics, and determine roles. |
| **Determine HBP roles in development** | Some Moderators want to and can develop the detailed plan for the session. If the HBP Moderator wants to develop the session, agree on how you will incorporate their design into the complete Run of Show detail |
| **Develop the detailed plan** | You can use the [**Run of Show**](https://hbp.box.com/s/6f6h9ekf0dhl7o1qpxasxeaghlp5d5x6)template to document a *“running order”* for each day of the event. Facilitate co-creation of this document with the client and gather logistical details from the client. This document is for the HBP and client team use only |
| **Determine materials needed** | As part of developing the Run of Show with the client, begin listing the materials and supplies needed and who will be responsible for them. HBP is typically responsible only for digital copies of content. If the fees for the event cover it, we can provide HBP SWAG. Here are guidelines for HBP SWAG by offering:  **SL CUS** - Typical giveaways for an SL CUS session include:   * 1 HBP Swag kit per learners and client team members or * Select from these options:   1. One book (recently published; tied to the overall module topic or related to the Thought Leader)   2. Hard-copy issue of the latest HBR   3. HBP Pens   4. Learning Journalsif prescriptive reflection is part of the program curriculum (typical with less senior audiences)   **Custom Blended** - Giveaways for this offering are at the discretion of the SPM/DD and based on the price point  **POV offerings** - We do not give away materials in PL-POV or ESS-POV unless the RM added that cost into the SOW. |
| **Determine support roles during delivery** | Talk among the HBP team, with the Moderator, and with the client to determine who from HBP should attend the session. A key role of the on-site HBP team member is to keep the Moderator out of the fray of logistics. For a new, high-profile client, consider having the PM or PLP go to the session in addition to the DS.  If an HBP Thought leader will be delivering virtually, identify who will support that person if he or she comes to the HBP office or Klarman.  Once you’ve made decision about delivery support roles, work with the client regarding travel/ground transport/accommodation. |
| **Discuss the client’s logistical plans** | Clients are often more anxious about the success of a face-to-face event than a virtual one, so they will appreciate your spending time listening to them think through the logistical details. These conversations give you the chance to add value and act as a partner.  Talk through their plans for things like these:   * What support people will be on-site (i.e. technical support)? * What are their plans to print things, such as, name badges, name tents, and handouts? * What are they doing to communicate and address learners’ questions about travel? * AV requirements: Refer to this [AV checklist sample](https://hbp.box.com/s/7slwxuyybs4w4hq15335prbtqf1206nv) for help. * Technical requirements if using a simulation: Refer to the [Tech specs for sims in F2F](https://hbp.box.com/s/c4tr3fexbatpk9dtovufylscq34oxex2) for help. |
| **Conduct a tech test** | Well in advance of the event, conduct a test to experience the room set-up and how interaction will work. Depending on your design, check for these things:   * Is the location set up for telepresence? If not, plan to use WebEx and determine how the room microphones will feed into WebEx and how the cameras will be set up. * Will the HBP Thought Leader be able to see everyone? How are the tables and seats arranged? * Will the HBP Thought Leader be able to hear everyone? Do you need someone onsite to run microphones? * Will you record the session? * Do the HBP and client team members understand how to connect? This is especially important if using telepresence as the details vary by room. |
| **Review delivery needs with the Moderator** | Walk through the Windowpane Agenda and discuss   * session timing * supplies needed (i.e. flip charts and markers, handouts) * logistics needs (seating, breakout rooms) * adaptations for face-to-face delivery (i.e. we typically divide application exercises or sims into three blocks – introduction & set-up; play [individual or in groups]; and whole-group debrief). |
| **Conduct Co-Moderator prep** | Hold a prep session with the HBP Moderator and client Co-Moderator as you would for a virtual Context Setting. Discuss the set-up for the session. An ideal set up for Co-Moderator sessions is morning talk show-style with two chairs and a table in the front of the room with learners facing forward in a U-shape |
| **Conduct Thought Leader prep** | If your session will have an HBP Thought Leader component, prepare that person in two steps:   * Give the Thought Leader key information in advance about the situation in which he or she will be presenting (i.e. WebEx, Telepresence, etc.) and how we will accommodate learner interaction. * Hold a prep call with the client as you would for a virtual HBP Thought Leader session. |
| **Develop evaluations** | Develop daily evaluations with the client and decide whether to distribute in hard-copy or via SurveyMonkey. |
| **Conduct a dry run with the Moderator** | Walk through the content and make sure you have everything in order to do the dry-run with your client. Discuss things like timing for pulling simulation results and updating the debrief deck on the fly and the approach the moderator will take in opening and closing. |
| **Conduct a dry run with the client and Moderator** | Hold this session with enough time for the moderator to make any adjustments needed. Walk through the Run of Show with the HBP Moderator and the client. Update the Run of Show with any last-minute details that surface. Ask the HBP Moderator to talk through the content for each day, answering questions and incorporating feedback. |
| **Review risks and create backup plans** | Identify potential areas for risk (i.e. if you have a thought leader travelling face-to-face on the day of the session or a senior sponsor who is known to go over his/her allotted speaking time). Create backup plans for each risk. Share back-up plans with the Moderator for further input and decide how much of the back-up plans need to be communicated to the client. What you share will depend on their level of anxiety and desire for detail. |
| **Conduct a final launch check with the HBP team** | Debrief the client dry-run with the HBP team and verify that the person traveling to the event has:   * everything he or she needs for the event. * a plan for how to contact other HBP team members for any last-minute or emergency support * a usb drive containing all documents needed for the event (agendas, slides, handouts, evaluations, assignments). * blocked his or her calendar for the time away. * arranged for support for dependent activities (i.e. thought leader delivering the lecture from HBP or Klarman). * coverage for any other event tasks as needed by the non-traveling team members. * coverage for responsibilities in other projects while away. |

* Face-to-Face Process: Deliver

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| **Overview** | Being part of delivering of a face-to-face session can be a fulfilling experience, whether you’re a team member onsite, or you’re monitoring it virtually. |
| **Onsite tips** | Here are several considerations for team members during delivery:   * Confirm that the Moderator arrived on schedule. * If using a simulation, test access using the Wi-Fi the learners will use. * Be a calm and confident presence, dealing gracefully and thoughtfully with any issues that arise. * Use your back-up plans as needed. * Add value. Suggest best practices, help problem-solve and help out with the on-site activities. * Monitor the delivery of HBP content to make sure that the event satisfied the learning objectives, with an eye to seeing what we can improve for future face-to-face events. * For events that are longer than one day, you’ll often have the opportunity to course correct if needed on things like the way the Moderator is engaging with the group, how much time participants are getting to spend doing small-group activity, etc. * Spend time with the client team and build your relationship. * Help keep the HBP Moderator out of the fray of logistics. |
| **Provide Thought Leader support** | If the session includes an HBP Thought Leader, support that person by:   * Providing an up-to-date participant list so he or she will know who’s in the room. * Verifying with the Moderator and Thought Leader the cues for signaling and handling learner contributions and questions. |
| **Evaluate** | Be certain to implement the evaluation process and collect feedback from the learners.  After the event, debrief with the HBP team and Moderator before debriefing with the client. |

1. QUESTIONS / FEEDBACK

If you have questions and/or feedback after reviewing this job aid, please contact the Delivery PMO team via Slack (cl-gls-coe-delivery-pmo).