



DWFS OPPORTUNITY PROCESSING OUTLINE: PARTNER MEETING

<p>DWFS TEAM MEMBER</p> <p>Reed New Hire</p>	<p>JOB POSITION</p> <p>Operations Coordinator</p>	<p>DAYS WITH THE COMPANY</p> <p>90 days</p>
<p>STEP 1: REED'S INTRODUCTION</p> <ul style="list-style-type: none"> • WHO ARE YOU? • WHAT'S YOUR POSITION? • WHAT'S YOUR QUESTION? 	<p>STEP 2: PARTICIPANT FEEDBACK</p> <ul style="list-style-type: none"> • CLARIFYING QUESTIONS • REED'S IDEAL OUTCOME* • BARRIERS & CHALLENGES • SOLUTIONS 	<p>STEP 3: BEST-PRACTICE SPEAKER</p> <p>EMERALD SANTOS TALKS ABOUT THE BEST-PRACTICES BEHIND ENGAGING PARTNER MEETINGS</p>

HOW DO I: (PRESENTED BY REED)

- **How do I coordinate an engaging partner meeting?**

CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What is a partner meeting?
- What are the goals of your partner meeting?
- How do you define partner?
- What previous experience has prepared you to take this on?
- Do you have an agenda with time limits set?
- Do you know who your partners are?
- Have you selected a theme or topic to discuss?
- What does “engaging” mean to you?
- How many partners will be in attendance?
- Is this meeting virtual or in person?
- What do the partners typically contribute, if anything, to this meeting?
- What is the frequency of these meetings? Set date/time?
- Have you identified a “weakness” in this area?
- Do you have a sponsor?
- Do you have a venue?
- What do you bring to the table?
- Will your partner meeting focus on a sole industry or diverse partner types?
- Do you have unique services to present that can't be obtained from other partners?
- Do you have minutes from a previous meeting that you can review?
- Do you have a budget for this event?
- Have you reached out to another project or do you have a mentor?

MY IDEAL OUTCOME IS: (PRESENTED BY REED)

- **Emphasizing the importance of our need to work together to help the people we're trying to help. Putting on an event that highlights everything that we can provide.**

WHY IS IT SIGNIFICANT TO ANSWER REED'S QUESTION? (ANSWERED BY PARTICIPANTS)

- Use partner time wisely so they keep engaging with us
- Maximize our efforts
- So all community orgs can be on the same page
- Showcase our underutilized services
- Identify other community resources that can provide service to our clients
- Good way to keep partners in community updated about our services
- Allow partners to network with each other
- Buy in from partners
- To keep up with partner offerings and resources

- To help others learn about or clarify our processes
- Encouraging participant from customers, partners, and employers
- Increase our referrals (employer, customer)
- We lose our significance in our community if partners are not engaged
-

BARRIERS & CHALLENGES – WHAT ARE REED’S BARRIERS & CHALLENGES?

- Schedules
- Getting partners to attend
- Not a having venue
- Partner contact info
- Figuring out a relevant theme
- Getting partners to remain engaged throughout the event
- Capacity/location
- Technical issue
- Accessibility
- Weak previous relationships/rebuild relationships
- Lack of materials on services and programs
- Getting partners to stay for the whole time
- Getting guest speakers/presenters
- Subject matter experts having anxiety about presenting

SOLUTIONS:

- SERVE FOOD
- SIGN IN SHEET TO UPDATE CONTACT INFO
- PLAN AN ICEBREAKER
- OFFER SOME KIND OF TAKE HOME SWAG
- HAVE PARTNER/ EMPLOYER SPOTLIGHTS
- HAVE CUSTOMER SUCCESS STORIES
- PLAN AHEAD -FIND A LOCATION
- ALLOW VIRTUAL AND IN PERSON OPTION
- AUDIENCE INTERACTION
- TEST TECHNOLOGY AHEAD OF TIME
- ALLOW PARTNERS TO SHARE ABOUT THEIR ORGS (5 MINS)
- ASK FOR FEEDBACK/CONSIDER IT
- BREAK
- RESEARCH PARTNERS – FOCUS ON VALUE ADDED SERVICES
- ASK FOR RSVP

BEST PRACTICE SPEAKER: (EMERALD SANTOS ANSWERS REED’S QUESTION)

1. PARTNER RELATIONSHIPS

- LEVERAGE RELATIONSHIPS WITH ORGS FOR LOCATION (AT LITTLE TO NO COST)
- LEAN ON TEAMMATES FOR SUPPORT
- VISIT LOCATIONS/VISIT PARTNER ORGS AND GET FAMILIAR
- MAKE OUTBOUND REFERRALS

2. PREPARATION

- MAKE TIME & PLAN AHEAD
- SET UP MEETINGS WITH YOUR INTERNAL TEAM (WHO & WHAT)
- MAKE A CHECKLIST (BEFORE, DURING, AFTER)
- CONFIRM SPONSOR AND LOCATION (ASK FOR LOGOS/DETAILS/ ETC) *CHECKLIST

3. PRESENTATION

- USE POWERPOINT - DON’T OVERLOAD WITH TEXT
- INCLUDE THEME/TALK ABOUT THEME IN INTRODUCTION

- INTEGRATE SERVICE FEATURES
- INCLUDE MISSION STATEMENT
- COVER MEETING AGENDA
- KEEP INTROS SHORT AND SWEET
- HAVE A NETWORKING SESSION "POST EVENT OR PRE-EVENT"

4. POST-MEETING

- TOUCHPOINT WITH TEAM FOR FEEDBACK WHAT WENT WELL? / WHAT IMPROVEMENTS CAN WE MAKE?
- SURVEY PARTNERS (GET SPECIFIC)

Q&A

HOW TO AVOID DEATH BY POWERPOINT?

- USE BULLET POINTS
- DON'T READ STRAIGHT FROM THE POWERPOINT
- ADD RECOGNITION AND SUCCESS STORIES (USE ADULT & YOUTH) TIE IN TO REFERRAL FROM PARTNER
- PRACTICE AND GET FEEDBACK FROM INTERNAL STAFF (DRESS REHEARSAL)
- USE PICTURES AND VIDEOS
- SWITCH UP THE SPOTLIGHTS/THEMES
- BREAK OUT SESSIONS & SPEED NETWORKING

WHAT'S THE BEST TIME OF DAY? LENGTH OF MEETING?

- MORNINGS WORK BEST
- APPROX. 1.5 HOURS FOR EVENT (SCHEDULE VENUE FOR 30 ADDITIONAL MINS ON EITHER SIDE FOR NETWORKING & CLEANUP)
- USE A DOODLE POLL TO GAUGE THE BEST TIME FOR MAXIMUM ATTENDANCE

HOW DO YOU GET NEW PARTNERS INTERESTED IN ATTENDING?

- MEET WITH THEM FIRST – TALK ABOUT BENEFIT TO THEM AND CLIENTS
- INCLUDE BENEFIT AND CONTACT INFO IN INVITE (EVENTBRITE)
- SEND INVITE 3 WEEKS AHEAD OF TIME

HOW DO YOU MANAGE PARTNERS INTROS NOT RUNNING OVER?

- SEND FOLLOW UP EMAIL AND ATTENDANCE LIST

WOULD YOU INVITE PUBLIC ASSISTANCE AGENCIES?

- MAKE THEM A PARTNER SPOTLIGHT
- HAVE A RESOURCE TABLE FOR PARTNERS TO SHARE MATERIAL & BUSINESS CARDS & SWAG
- HAVE A PANEL INTERVIEW OF COMMUNITY BASED ORGS (CORE PARTNERS)

WHAT'S THE IDEAL FREQUENCY OF PARTNER MEETINGS?

- QUARTERLY
 - ◆ Q1 - SET EXPECTATIONS FOR THE YEAR/GOALS
 - ◆ Q2 - HIGHLIGHT SUCCESS, WHAT'S IN PROGRESS/ROLLING OUT
 - ◆ Q3 - IMPLEMENTATION, WHAT'S WORKING WELL?
 - ◆ Q4 - YEAR IN REVIEW, SHOW SOME SERVICE DATA... SPECIAL POPULATION & PARTNER IMPACT

HOW DO YOU ENSURE MATERIALS ARE ACCESSIBLE?

- LEAN ON DRS & AND OTHER PARTNERS WITH SPEC POPULATION FOCUS FOR GUIDANCE/RESOURCES
- SIMPLIFY MATERIAL/AGENDA FOR EASY CONVERSION
 - ◆ USE VERBIAGE LIKE "STARTING AT 10" VS "10 -11:30"
 - ◆ CONSIDER USING LARGE PRINT (18+ FONT)
 - ◆ MAKE YOUR POWERPOINT & DIGITAL DOCS ACCESSIBLE NOT JUST YOUR HANDOUTS
 - ◆ USE INTERPRETER SERVICES/RESOURCES & ASSISTIVE TECHNOLOGY



