



HBA Ambassador PROGRAM

Program Excellence Manager (PEM)
Orientation

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PEM TRAINING AGENDA

- Welcome and Introductions
- Overview of the PEM role
- Process (high-level)
- Points of contact: who's who and how you'll interact
- Problem solving and resources
- Q&A

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WELCOME & INTRODUCTIONS

In 60 seconds or less, share with us:

- Your name
- Day job
- Where you are in the world
- Why did you decide to become a Program Excellence Manager?





HBA Program Excellence Manager (PEM)

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Why did we create this role?

The HBA Global Ambassador Program has grown vastly in a very short time, and our PEMs will play a major role in helping to scale.

- **Strategic relationship management:** further the develop the relationship and scale the program to meet corporate needs. Work closely with the organization for business development and sales as appropriate
- **QA/Satisfaction:** ensure programs are operating smoothly by escalating/triaging challenges, capturing best practices and feedback
- **Engagement/Connector:** aid companies in identifying opportunities to better engage with the HBA

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PEM Role

A Program Excellence Manager (PEM) is a knowledgeable HBA volunteer who serves as the relationship manager between the HBA Global Ambassador Program (GAP) to their assigned company(ies) and:

- Have experience with the GAP process and can share best practices to develop or improve program alignment with corporate strategy or needs, enhance or expand programs and participation, and identify opportunities for sales, etc.
- Conduct touchpoints with the program leadership and Advisors to ensure satisfaction and progress, field questions and concerns, and provide feedback to HBA to ensure overall program success.
- Facilitate connections between programs and relevant HBA regions/locations to increase collaboration and member engagement, recommend HBA resources and offerings that would be beneficial, and identify other opportunities for the company and program's engagement with the HBA.

Each Company will be assigned one PEM for up to 3 to 5 cohorts. Ideal candidates:

- Have a passion for the Ambassador Program and cultivating emerging leaders and can see and articulate how to strategically leverage the program or solve other internal challenges.
- Can deliver on HBA's culture of white glove service and radical hospitality.
- All genders are eligible.

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PEM vs Advisor

PEM	Advisor
Manages relationship with the company , focusing on expanding programs, driving engagement, and business development.	Guides and mentors the program cohort , working with the executive committee and participants, offering external expertise and support.
Proactively identifies opportunities for program expansion and sales of HBA services (e.g., Master Classes, Coaching).	Assists with program execution, including goal setting, tracking, and stakeholder presentations.
Regularly connects with company leadership to align the program with corporate strategy and ensure satisfaction.	Encourages self-directed growth in participants and provides informal mentorship.
Collects feedback, solves program/advisor challenges, and ensures accurate program reporting; participates in partnership renewal discussions.	Responds to PEM check-ins, escalates issues as needed, and stays updated on HBA offering.

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PEM Focus Areas

Business Development

Assist the company in their program strategy planning and help identify ways the program can meet needs, fill gaps, and expand to additional programs over time. Initiate relaunch discussions as programs end.

Identify opportunities for the company to leverage the program, the HBA, and other offerings that will improve the program experience, increase engagement or visibility.

Connect once or twice annually with the company's HBA account manager (staff) to align on overall corporate needs, priorities, and opportunities.

Satisfaction

Routinely connect with the company's internal and program leadership and Advisors to ensure satisfaction and progress. Monitor program check-in reports to proactively identify, solve or escalate issues.

Collect feedback and new best practices; direct to HBA Central for documentation. Ensure program data accuracy in HBA systems.

Answer questions and practice radical hospitality as HBA's representative and front-line resource for the program leadership.

Engagement

Ensure connections to relevant HBA components (chapters/regions) in local areas.

Provide suggestions to increase corporate and individual engagement.

Act as resource to program leadership to identify HBA engagement tactics.

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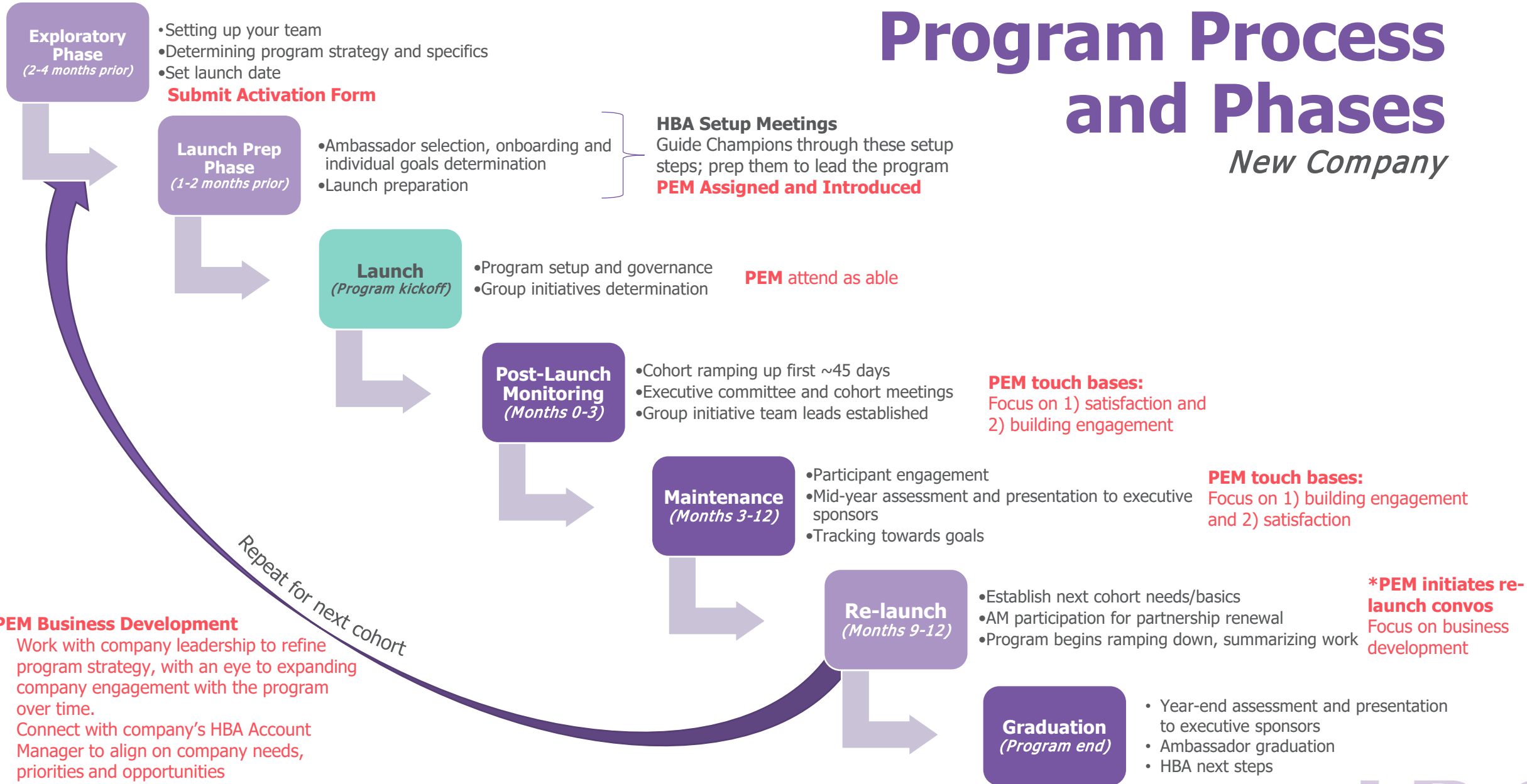


Skills needed to be effective

- **Leading without authority:** you are the guide, but decisions are up to the company; gentle delegation when appropriate
- **Communication:** the ability to keep all stakeholders informed; clear, concise and professional
- **Business acumen:** understand the company's business issues and help them mold the program to fit the needs; ensure ROI
- **Business development:** aim to grow the relationship between the program and the company, developing the partnership and adding value to the company
- **Relationship management:** how to build and maintain meaningful personal and business relationships
- **Sales:** understand the company's needs and opportunities to pitch appropriate offerings
- **Collaboration:** the ability to work constructively with a wide variety of people at different levels across the globe
- **Learning mindset:** PEMs will need a thorough understanding of the Global Ambassador Program, the HBA's programs, offerings and chapter/regional structure, and should desire to always increase their knowledge to best serve their programs

Program Process and Phases

New Company





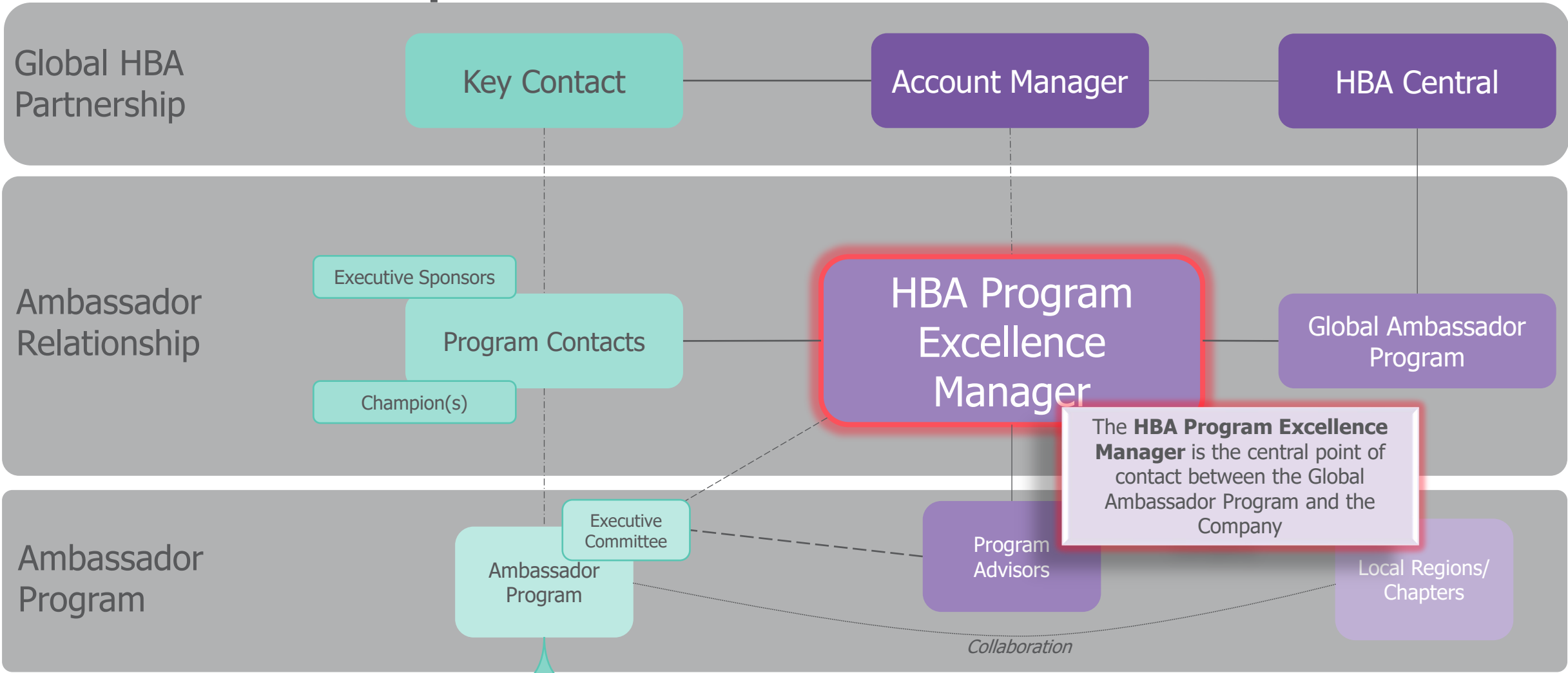
PEM Points of Contact

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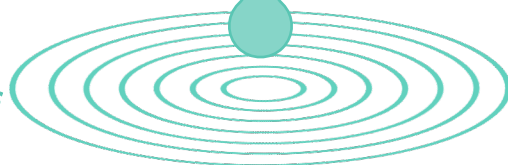
Corporate Partner

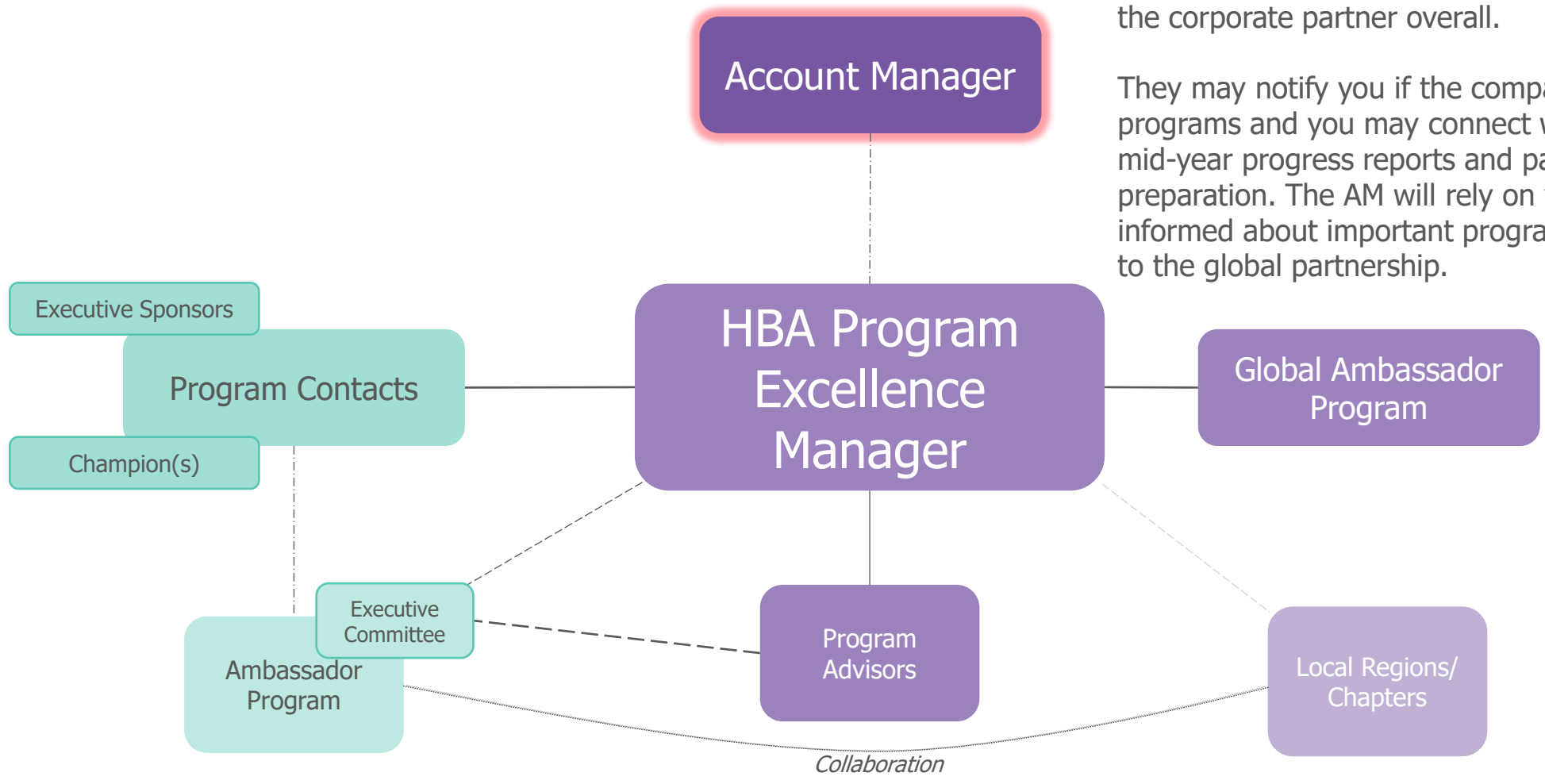
HBA



The **HBA Program Excellence Manager** is the central point of contact between the Global Ambassador Program and the Company

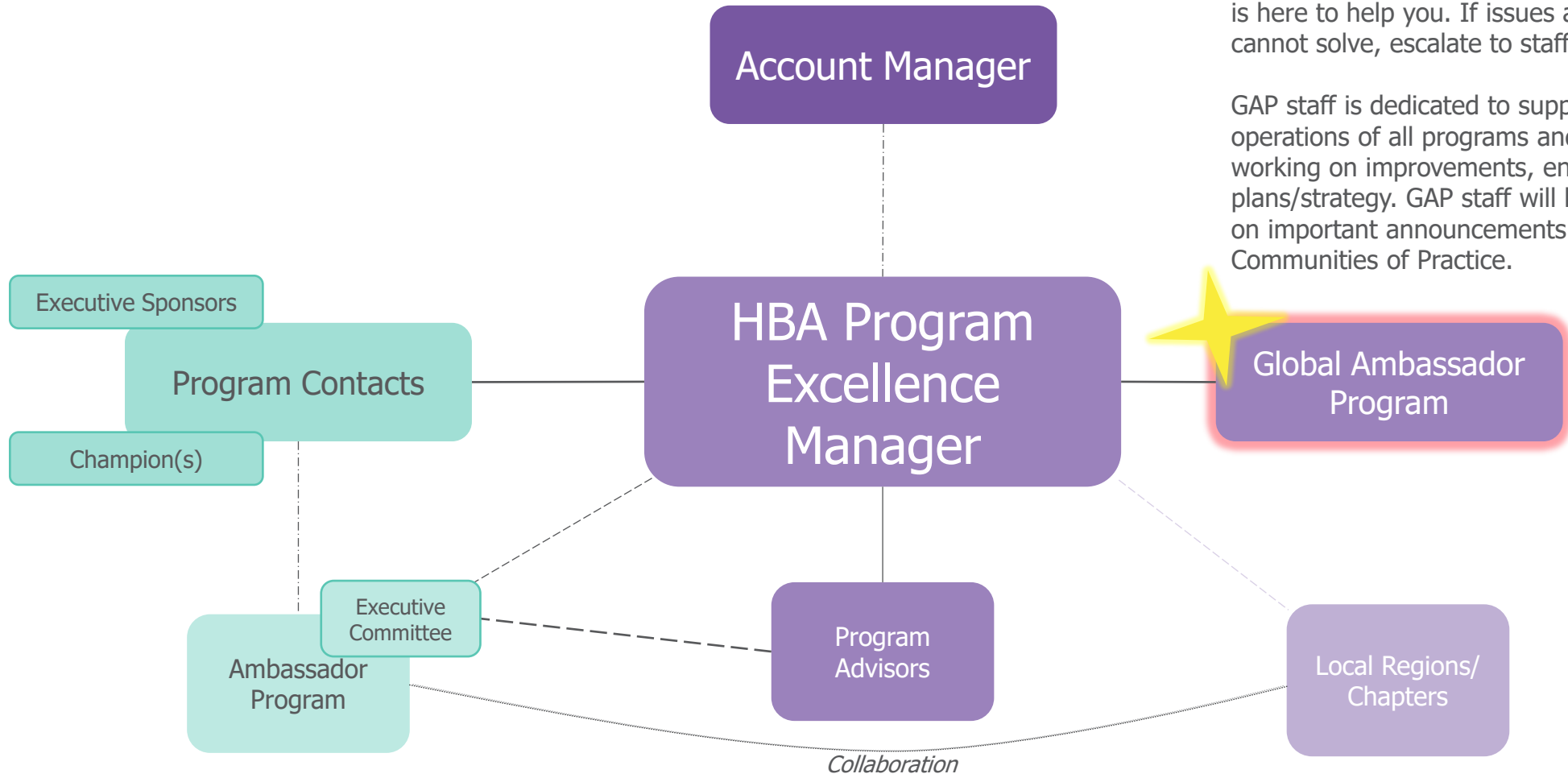
Benefits to other employees





You'll connect with the HBA staff **Account Manager (AM)** for the organization 1-2x each year. It is the AM's job to build and protect the relationship with the corporate partner overall.

They may notify you if the company adds additional programs and you may connect with them to give mid-year progress reports and participate in renewal preparation. The AM will rely on you to keep them informed about important program updates relevant to the global partnership.



The **Global Ambassador Program (GAP) staff** is here to help you. If issues arise that you cannot solve, escalate to staff.

GAP staff is dedicated to supporting the operations of all programs and are consistently working on improvements, enhancements and plans/strategy. GAP staff will keep you updated on important announcements via our volunteer Communities of Practice.

After Launch, you'll monitor check-in reports to your program(s) **Executive Committee (EC)** to ensure all is going well / there are no issues with their Advisors, etc. These check-ins happen more frequently in the few weeks following Launch.





You'll be introduced to the two program **Advisors** before Launch, and they'll participate in Launch prep as able, but your primary interactions will be after Launch.

The Advisors' role is to guide the executive committee, and like the EC, you'll monitor check in reports to ensure all is going well and there are no issues that need to be managed. These check-ins happen more frequently in the few weeks following Launch. Live touch-bases may be recommended should any issues arise to most efficiently come to solutions.

*HBA Best Practice:

1. Identify the local chapter(s)/region(s)
2. Identify the chapter/region leaders on their board page.
In **Chapters**, you'll want to identify and connect with the Chapter President or VP; **Regions**, you'll want to identify the Corporate Relations President.
3. Once connected, facilitate introductions to the program leadership. Best first steps upon connecting are:
Chapter/Region conducts a **Lunch & Learn OR partners with program to hold a joint event.**

When you have a program that is located within an existing HBA chapter or region, it is critical that the PEM introduce the program Champions to the **chapter/regional leadership*** early in the program process.

This will help the region/chapter and program get off on the right foot and collaborating! In general, you'll be seen as a helpful guide to navigate HBA overall, and from an engagement perspective, the local chapter/region is the perfect engagement partner.



Who to go to for help

- **GAP staff support:**
 - Anna Treudt (*GAP staff lead*) and Lauren Peck (*through end 2024*)
- Lean on the Resource Centers:
 - [Volunteer Resource Center](#)
 - [GAP Resource Center](#) (for company-facing resources)
- Join your Volunteer Communities of Practice monthly!





Next Steps

- If you haven't yet, please apply for your PEM role
 - Upon approval, you'll be granted permissions in HBA's system for the Ambassador Program Leadership Hub and more
- The HBA will reach out to confirm your company assignments
- Upon confirmation, the HBA will facilitate introductions to program/company contacts and provide background on the company's history, engagement and plans with the program.



Q&A

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What do you think?

- Program EXCELLENCE or ENGAGEMENT Manager?
- PEM-Specific Communities of Practice – interested?

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