Before-During-After Success Process

The most expensive element of any in-person program is assembling all of the participants in the room. To maximize the benefit to every individual, and ensure the business goals are met, I institute my Before-During-After Success Process. These practices permit me to create and maintain a high quality connection with the people attending the program, which paves the way for them to see the value of the ideas and tools and apply it to their own lives. I work to create this connection before, during, and after the event:

Before the Event:

- **I discuss the goals with the budget owner (prior to signed agreement).** I have a fiduciary responsibility to ensure this program benefits the bottom line. So I talk with the person who owns the budget to make sure I know the business goals for the program.
- **I hold phone calls with representative participants (1-2 weeks before event).** Please introduce me to a few participants who I can speak to before the event. I will spend 20-30 minutes on the phone with each one to become familiar with the real situations they face. This helps me tailor the presentation to their needs. If there are multiple distinct groups in the audience, I would like to speak to at least 2 people from each group.
- **I ask you to distribute pre-work to all participants (1 week & 1 day before event).** In the week before the event, I want participants to receive a letter from me about the program. In this letter, I ask them to come up with topics to use for the in-session exercises. (This is called the "pre-work.") This gets the participants excited about the program and thinking about how it will benefit them. A reminder about the pre-work needs to go out the day before the event.
- **I need the final headcount 10 days before event.** My proprietary materials for the event will be printed and shipped to the venue in advance. In the event of a significant number of cancellations, I ask you to ship the extra materials back to me at your cost.

On the Day of the Event, Before the Event Starts

- **I come early to meet participants.** If I can attend earlier sessions, I would be delighted to do that.
- **Also, see my separate Room Setup document.**

During the Event

- I have the participants do individual written exercises, so that they can test drive the tactics on their own issues.
- We have a variety of small-group and large-group interactions to help them chew the material.

On the Day of the Event, as We Close

- **I distribute a written evaluation** for feedback.
- **I offer additional free written materials** to all participants. This gives participants an easy way to refresh their recollection of the ideas from the program.
- **I offer a 2-month free trial in my Thinking Lab** (a $150 value per person) to all participants. This gives participants a way to grow their understanding and practice applying the ideas with the benefit my guidance.

After the Event:

- **I send a recap to the buyer.** I share my observations about the participants and any issues that I noticed that could be of importance to the buyer.
- **I hold a debriefing with the buyer.** During this call, we can discuss the participants feedback. the buyer’s feedback, and my recap.
- **I hold a 1-hour followup Q&A / webinar with the participants 1-2 weeks after the main event.** The purpose of the followup call is to address any “parking lot” issues that come up during the day, plus to answer questions that come up from participants trying out the methods.

I have found that this success process turns a learning event into a transformational event. These practices are integral to all programs I deliver.

If you have suggestions for metrics we could track before and after, I would be delighted to incorporate them into the success process.

– Jean Moroney