

# Online Introduction Checklist

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Intention of this document: Give the host of an online introduction a place to create from (this is a guide not a how to).

## **Phase 1- Introduction Creation**

### 1. Introduction Unfolding

- Name, Possibility, Outcome, Milestones
- Send Classroom Leader request via email with the following information:
  - Request for a **date** and **time** (with a backup date) and leader (can include another leader as well for workability).
  - Type of introduction (Communication Access to Power, Power to Create, Team 1, Team 2, Landmark Forum).
  - Request for a **creation call** (no less than a week before the event and at least 1 hour long).
  - **Clearing call** (at least 30 minutes) before the event.
  - **Debrief call** after the event to get complete about the registrations and speculate about what worked and didn't work.
  - **Flyer** for the event to be approved. The flyer has all the relevant information and a registration link embedded (make sure it can be edited in case there is a counter off for date etc.)
  - **The Structure for fulfillment for the Introduction**

**NOTE:** Creation call and clearing calls are mandatory and anyone with a guest must attend both to ensure the integrity and workability of the event.

### 2. **Registration link** to manage the guests, graduates, and potential to register at the event (google form etc) that includes at the minimum the following information:

- Name
- Email Address
- Phone number
- Landmark Center
- Who invited you to attend this event? (If you invited a guest to this

# Online Introduction Checklist

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- event: What is the name of your guest?)
- Please select your program status: (i.e. Completed CAP, CPC, T1, T2, LF)

## **Phase 2- After Introduction is approved**

1. Register the People Who Assist for the Introduction:
  - Online Program Manager (OPM)
  - Presentation Manager
  - Breakout Room Manager
2. Request a Landmark Zoom link for the Introduction from Classroom Leader.
3. Get a zoom line for the Introduction Creation Call.
4. Create a calendar invite for the Creation Call and the Introduction- send to the Leader, People Who Assist, and TMLP participants.
5. Have a call to create the event with the Leader and the introduction accountables.
6. Create 1-2 guest game accountable to fulfill the guest game and create breakout rooms in partnership with the OPM. Stay in communication with the Leader on the number of guests confirmed.
7. At least 48 hours before the Introduction:
  - Have the Registration Link (test it)
  - Power Point Presentation
  - Details for the course the guests are registering into (Days, times, cost, etc)
  - Reconfirm the TMLP participants and their guests
  - Create the breakout rooms with the OPM

TMLP participants attending the Introduction come prepare to share powerfully what they accomplished in the Team, Management, and Leadership Program.

TMLP participants who have guests in the Introduction come prepared to have a registration conversation in the breakout room with their guest.

## **NATIONAL EVENT**

# Online Introduction Checklist

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For a national event provide all the details and promotional material to the national team lead, and request an opportunity to share the feasible opportunity on the national accountable team call.

Create partnership with the national pod and make requests for promises from the other centers. Enroll a team to manage the National Team promises.

## **Phase 3- Day of the Introduction**

### **1. Clearing Call:**

- a. Create the possibility, the outcome of the introduction
- b. Go over the Introduction- naming, breakout rooms, registration link, etc
- c. Communication channel during the introduction – who, what, where (for example if they want assistance in registering their guest how and with who do they communicate)
- d. How they report registrations and to whom

### **2. Debriefing Call:**

- a. Complete the game created for the introduction- promise vs what's so
- b. Go over who registered, who did not, and where the guests are in the conversation
- c. Capture any follow up actions
- d. What worked and what did not work
- e. Acknowledgment
- f. Provide the final statistics to the Leader