

## PROFESSIONAL DEVELOPMENT PROGRAMS WORKSHOP





## Introduction to Erin Roberts

Erin is the founding partner of Zzeem. After spending 12 years in the securities industry, Erin founded Zzeem, a consulting and technology firm, in 2000.

Coupled with a Master's degree in Economics and a Chartered Financial Analyst designation, Erin's experience with a wide variety of organizations has led her to understand the importance of business processes.

Over the years Erin has noted that many of the issues faced by most organizations relate to weak or non-existent business processes.

*"When you put the cart before the horse, it has to work much harder to push the load. The right people may be able to work around a bad system, but with the right system, your whole team is more efficient."*

Erin's passion is food, which has nothing to do with business processes... does it?

## Introduction to Zzeem

Zzeem provides [business resources](#), [consultation](#), [software](#) and [learning tools](#) for industry, professional and government organizations — as well as the subject matter experts who serve them.

For expert professional development, ask us about custom [training programs](#), [workshops](#) and revenue-generating [continuing education programs](#).

Short on in-house resources? We can build you a virtual [back office](#), and provide the expertise to staff it.

Searching for the professional edge that is known to drive winning service organizations? We can [coach your Board members and Leadership Teams](#) to success.

Whatever your size or budget, Zzeem has a custom, modular solution that is a perfect fit for your organization.

## Call Us:

Call us to help you achieve your goals for your professional development program.

If you already have a program, we'll help you take it to the next level.

If you don't, we'll help you create one that is a highly professional and successful.

- ❑ 416.410.5867 x.101
- ❑ erin@zzeem.com

## What does Zzeem provide?

### Operational Support

- Membership/client management
- Marketing execution
- Board support & training
- Event management
- Website design, development & hosting
- Bookkeeping & accounting
- Tax filings

### Member Services

#### Professional Development Programs

- Evaluation framework
- Program creation & enhancement
  - ◆ Member value
  - ◆ Revenue
- Online learning
  - ◆ Curriculum design
  - ◆ Program production & hosting

#### Peer Group Programs

- Set-up & logistics
- Management & facilitation

### Revenue Generation

#### Member Recruitment

- Marketing process
- Resources & collateral
- Execution

#### Sponsorship

- Marketing process
- Resources & collateral
- Execution

# Workshop Introduction & Agenda

## Introduction to Professional Development Workshop

This is a fast-paced 90 minute session. In this workshop you will have the opportunity to:

**Assess** your current situation

- What's working well now? What could be better?
- We'll give you our proprietary assessment framework to make it simple

**Learn** your options

- Seminars, webinars, workshops, self-directed online learning? What resonates with your members?
- What resources do you need for each type of program?
- How can you attract more sponsorship? What are other organizations doing?

**Prepare** your action plan

- What are your first steps to take your professional development program to the next level?

## Workshop Agenda

### Introductions

### Program Options & Tips

- Seminars & Webinars
- Workshops & Self-directed online learning
- Peer groups

### Assessment Framework

- Professional development event scorecard
- Upgrade options & tips

### Action Plan

### Networking

## Program Options

### Seminars & Webinars

These are complimentary methods of delivering the same type of message. These methods are appropriate for providing an introduction or an overview of a concept or a point of view to a large group.

#### Seminars

##### Venue, Format & Deliverables

This is an in-person event, usually a 1-2 hour lecture-style delivery followed by Q&A. The takeaway is typically a lecture outline.

##### Price

Nominal

##### Resources

- SMEs – preferably more than one, or a panel with moderator
- Outline (takeaway)
- Powerpoint
- Administration (marketing, sponsorship, booking, onsite registration)

#### Webinars

##### Format & Deliverables

This is virtual event delivered via the internet and telephone. The length is typically 60 minutes maximum. The most effective use of the medium is a scripted presentation with active use of the webinar tools.

##### Price

Nominal

##### Resources

- SMEs – preferably more than one, or a panel with moderator
- Webinar Producer
- Webinar software & call-in number
- Powerpoint
- Website w/ecommerce & CMS
- Webinar recording & outline for download
- Administration (marketing, sponsorship, booking, follow-up)

## Workshops & Self-Directed Online Learning

These methods are both effective for delivering in-depth information with an opportunity to learn by applying the concepts using relevant tools and exercises. Interaction is an important part of both methods.

### Workshops

#### Venue, Format & Deliverables

This is an in-person event, usually a 1/2 to full day. Participants expect to learn how to apply specific knowledge in a real-life situation. They expect to interact with the instructor and with each other. The takeaway is typically a printed tool or workbook that can be reused.

#### Price

\$100 and up

#### Resources

- SME
- Workbooks or tools (takeaway)
- Powerpoint
- Administration (marketing, sponsorship, booking, onsite registration)

### Self-Directed Online Learning

#### Venue, Format & Deliverables

This is a virtual event delivered via an interactive website. As with workshops, participants expect to learn how to apply specific knowledge in a real-life situation. The takeaways are online tools to use while learning and later, in live workplace application

#### Price

\$100 and up

#### Resources

- SME- one or more
- Curriculum designer
- Interactive website with exercises
- CMS, ecommerce, hosting
- Administration (marketing, sponsorship, booking, follow-up)
- Optional: Audio, video, animation, exams (pass or fail), certificate

## Peer Groups

Peer groups are small groups of individuals with similar daily challenges. These programs typically focus on either peer mentoring or learning. The most effective and sustainable groups provide a combination.

## Venue, Format & Deliverables

Peer mentoring groups operate most effectively in groups of 6-7 people. Learning or combination groups can work effectively in groups of up to 30 people. A typical run time is 3 hours to a full day anywhere from monthly to quarterly.

## Price

Included in membership or \$1-5k annually

## Resources

- ❑ Facilitator
- ❑ Agenda (same format each time)
- ❑ Administration (marketing, sponsorship, booking)
- ❑ Optional
  - ◆ Exercises (i.e. positive focus, action plan)
  - ◆ Workbooks (takeaway)
  - ◆ Case study handouts
  - ◆ Speakers
  - ◆ Coaching





# Professional Development Event Scorecard

We use this scorecard to assess the success of each of your organization's professional development events in the two more important areas—member service and revenue.

The scorecard tells you at a glance which events are excellent, which ones need work and specifically what to improve.

Then we use our experience to help you create a strategy to take your program to the next level.

## Instructions:

In the first column, list the professional development events that you offer each year to your members. Then score each event by seven critical criteria:

### Member Service

#### A- Popularity: score 1 to 4

How quickly does the event sell out? Do you always have a waiting list? If so, it's very popular. If you always have trouble filling the seats, it's not popular.

#### B- Size: score 1 to 4

What percentage of your total membership attends this event? If 80% attend, it's a large event. If 20% attend, it's a small event.

#### C- Necessity: score 1 to 4

Is event attendance necessary to achieve or maintain a professional designation?

### Revenue

#### D- Beneficial By-Products: score 1 to 4

What extra benefits result from this event? Does it bring prestige, credibility, acclaim or positive media attention to your organization and your members?

#### E- Sponsor Revenue: score 1 to 4

Do you have trouble finding sponsors or do you have a waiting list?

#### F- Net Revenue: score -4 to 4

Does this event add huge revenue to your organization's bottom line? Give it a score of 4. Does the event cost the organization a huge amount of money? Then give it a score of -4.

#### Sub-total

Now add up the scores for these 6 categories.

#### Staff Resources: score -4 to -1

Does this event take a huge amount of energy and time on the part of the staff and the board to organize and execute it? If so give it a high negative score. If it takes almost no time, give it low negative score.

#### Total

Subtract the Staff Resources score from the sub-total to get the final score.

# Professional Development Event Scorecard

Now we analyze the scores to see where we can achieve the greatest improvement with the least amount of effort.

## Instructions:

1. Look at the sub-total column and circle the highest score and the lowest score.
2. Then look at the Total column and do the same thing. Is there any difference?
3. For each of these two events, highlight the categories where they scored lowest. Are there any easy improvements that you can make to increase their total score?

## Example:

PROFESSIONAL DEVELOPMENT EVENT SCORECARD									
EVENT	A	+ B	+ C	+ D	+ E	+/- F	= Sub total	- G	= Total
Spring conference	4	4	3	3	3	3	20	-4	16
Fall conference	3	4	3	3	3	2	18	-4	14
Pre-conference workshops	2	2	3	2	0	-2	7	-4	3
Lunch & learns	4	2	1	1	0	8	16	-2	14
Webinars (CEU-eligible)	3	2	2	1	2	1	11	-2	9
Webinars (non-CEU-eligible)	2	1	1	1	2	-1	6	-2	4
Networking breakfasts	3	2	1	1	0	2	9	-2	7

LEGEND		
COLUMN		SCORE
A:	Popularity	1 to 4
B:	Size	1 to 4
C:	Necessity	1 to 4
D:	Beneficial By-Products	1 to 4
E:	Sponsor Revenue	0 to 4
F:	Net Revenue	-4 to 4
G:	Staff Resources	-4 to -1

# Professional Development Event Scorecard

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LEGEND		
COLUMN		SCORE
<b>A:</b>	Popularity	1 to 4
<b>B:</b>	Size	1 to 4
<b>C:</b>	Necessity	1 to 4
<b>D:</b>	Beneficial By-Products	1 to 4
<b>E:</b>	Sponsor Revenue	0 to 4
<b>F:</b>	Net Revenue	-4 to 4
<b>G:</b>	Staff Resources	-4 to -1



# Action Plan

Next we create an action plan to take the professional development program to the next level.

## Instructions:

1. Is there anything you can do to add even more revenue and member value to your best events or to streamline the staff resources required?
2. Can you significantly improve the weakest areas of your lowest scoring events? Or is it better to try another format?

## Example:

ACTION PLAN			
EVENT	WEAK AREAS	ACTION STEPS	WHO
Spring conference	Staff resources	Improve our internal process	?
Pre-conference workshops	Staff resources	Replace these with webinars and self-directed online learning	John/Marta
	Sponsor revenue		
	Net revenue		
Webinars (non-CEU-eligible)	Size	Redeploy resources to CEU-eligible webinars	John
	Necessity		
	Beneficial by-products		
	Net revenue	Prepare sponsorship strategy & process	?
		Solicit sponsorship	Katy













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**Helping Build Successful Service Organizations**