The diagram on the **last page** shows our typical Lean Team Alignment Partnering setup that we have found best fosters the collaborative environment we need to make the session most successful.

The circular chair formation is where we will spend most of our time during the session, but we will also use the breakout tables to split off into silo-ed and later the realigned horizontal teams to discuss relevant issues. The projector and screen is where we will broadcast our Live Notes of the session for participants to view in real time. **NOTE:** all portions of the room setup can be adjusted to comply with any physical distancing requirements at the time.

To get everything ready, please prepare the following:

> A room big enough to accommodate the circular chairs plus breakout table format. Some clients choose to book a room at a local hotel to ensure they get this important element right.
> Projector, screen (or blank wall to project onto), power strip/extension cord, HDMI or other cable to attach to projector (we have Mac specific adapters for our laptop), and a small table for the projector and laptop.
> (2) 3M-style Flip Charts (self-sticking) and two boxes of multi-color markers.
> If there is breakfast, it should be ready 30 minutes before the session. Please serve Coffee, water and food with some protein (easy on the pastries) to help get people going, some serve breakfast burritos.
> Lunch should be served in the room at about 11:30 am, something like sandwiches and salads usually works better than heavy food like Italian or pizza which tends to make people sluggish. Having food at the session also keeps the flow going, helps the team get to know one another, and keeps us moving on time.
> For full day sessions, please serve fresh cookies at 2:00 pm for a mid-afternoon pick-up.

When you're looking for the room it would be helpful if you could send us a couple of pictures so we can tell you if it will be conducive to the layout we need. Sometimes it can be hard to tell!

To put into the email to the client:
[Name]

I've attached a PDF that has a checklist of logistics as well as a diagram of the setup for our partnering session coming up on [**DATE**]. As noted in our proposal, this will be a [**Kickoff/Follow-Up**] session, so we recommend scheduling [**4-5/6-7**] hours for the session. When setting the event start time, it helps to recommend a "gathering time" to ensure everyone is present for an on-time start. For example, "The session will begin at 8:30, but we will have coffee and a light breakfast for you so please plan to show up between by 8:15 to eat something and get settled."

If there will be someone other than you who will be our logistics contact, please just let me know how to contact them by phone and email. And if there is a different person who will meet us the day of it would be helpful to know that also. We usually arrive 45 minutes early to assure the setup is correct and finalize details.

Please also immediately send a "HOLD THIS DATE" email to all participants, including both of us, then send the actual event invite two weeks prior, again including both of us. We will send the pre-session survey to the same people you send the event invite to, so if you would like to have it sent to a larger audience, please send a list of emails and we will be sure to include them.

Lastly, if you have any specific concerns about either the project itself or the team that you feel we should know about ahead of time, please feel free to share that, or let us know if we should schedule a call to discuss.

Sample invite language for Follow-Up: "We will be conducting a follow-up to our [**month**] Alignment Partnering session this [**date**]. During the session we will again review what is "Working" and "Not Working" with the project team before assembling into our horizontal teams to better understand and improve those Issues and Risks the team agrees are most important. In addition to these solutions we will also again create 90 Day goals the team needs to focus on and Action Items related to our discussions. You should see the Pre-

Session survey come out on [**date**]. The session will begin at [**time**], but we will have [**coffee/snacks/other**] please plan to show up [**time minus 15-30 minutes**] to get something to eat/drink and get settled."

<u>Sample invite language for Kick-Off</u>: "We will be conducting an Alignment Partnering session this [**date**]. During the session we will discuss what is "Working" and "Not Working" with the project team before realigning into horizontal teams to better understand and improve the Issues and Risks the team agrees are most important. In addition to these solutions we will create 90 Day goals the team needs to focus on and Action Items related to our discussions. You should see the Pre-Session survey come out on [**date**]. The session will begin at [**time**], but we will have [**coffee/snacks/other**] please plan to show up [**time minus 15-30 minutes**] to get something to eat/drink and get settled."

<u>Sample invite language for Retrospective</u>: "We will be conducting a Retrospective Partnering session this [**date**]. During the session we will discuss what "Worked Well" and "What Didn't Work so Well" with the project team before realigning into horizontal teams to better understand and take advantage of the Big Successes and Setbacks the team agrees are most important. In addition to these Lessons Learned we will create Action Items related to our discussions to develop future implementation opportunities. You should see a Pre-Session survey come out on [**date**]. The session will begin at [**time**], but we will have [**coffee/snacks/other**] please plan to show up [**time minus 15-30 minutes**] to get something to eat/drink and get settled."

Note: The breakout tables say "Table for 7" since that corresponds to our typical partnering group size. However, the circle in the middle should have enough seats for the expected number of attendees with each breakout table having enough space for approximately ¼ of the group.

Typical Alignment Partnering Initial Room Setup

Screen

Projector Desk

Power Cord→

Table for 7

Table for 7

Table for 7

Table for 7