

FACILITATOR BRIEFING CHECKLIST

Opening the Briefing

1. Welcome the Customers to the Briefing
2. State the Briefing goal in the Customers' terms
3. Introduce yourself and establish roles
4. Validate objectives and manage introductions
 - a. Customer introductions and objectives
 - b. Host Company Discussion Leader and Executive introductions
 - c. Account Team and Partner introductions
5. Preview the agenda and connect it to the objectives
6. Position the feedback survey and any other essential logistics
7. Thank them for investing their time
8. Introduce the first topic and the Discussion Leader

Making Transitions

1. Thank the Discussion Leader
2. Ask for questions and/or ask a question
3. Recap and record action items
4. Confirm that the objective has been met and ask to check it off the list
5. Invite the Customers to note their comments on the feedback survey
- 6a. Preview the next session topic and set up for the break: – time to return, refreshments, bathrooms, business center etc.
- 6b. OR Introduce the next session topic and next Discussion Leader

Introducing Discussion Leaders (DLs aka Speakers)

1. Link the next session topic to the overall Briefing goal and to a specific objective
2. Establish the Discussion Leader's credibility on the topic
3. Introduce the Discussion Leader by name

Closing the Briefing

1. Set the stage for the close
2. Review the list of objectives and complete the check off
3. Review and assign the action items
4. Invite the Key Customer to make closing comments
5. Invite the Account Manager to outline next steps and make closing comments
6. Ask the Customers to complete their feedback surveys
7. Thank all participants