EXECUTIVE DISCUSSION CHECKLIST

Prepare the review

Use this with the event owner before invitations go out, and review it again before the discussion. It helps the team check what participants are being promised, how the session will run and what happens afterward.

How to use this checklist

Save a copy, then type in the fields or print it. Review each item with the person responsible. Select Confirmed only when you can point to the relevant record or decision. Use Open when something still needs attention. Use Not applicable only with a reason. Record unresolved items, owners and dates in the action notes. Nothing is sent automatically. An unchecked or Open item is a question to resolve, not an automatic reason to cancel. The owner should decide what must be settled before the next commitment.

Fictional situation - A sponsor proposes a discussion about reducing disruption during application changes. The useful participant question could be: "What has helped teams make changes without interrupting critical services?" If the invitation promises a peer discussion, an agenda dominated by a product presentation would not match that promise. Agree the sponsor's role and the moderator's plan before inviting people.

Discussion or program

Up to 150 characters

Event owner

Up to 150 characters

Review stage and date

Up to 150 characters

EXECUTIVE DISCUSSION CHECKLIST

Review each item

Choose one status for each item. Confirmed means you can point to a record or decision; Open means it needs attention. Explain any Not applicable choice in the action notes. Unmarked items are not yet reviewed.

1. The discussion asks a question participants have a reason to explore.

Write the issue in the participants' terms and explain what they could gain. A broad theme such as "digital transformation" is not yet a discussion question.

◯ Confirmed ◯ Open ◯ Not applicable

2. The team has written who belongs in the discussion and who does not.

State relevant responsibilities and experience, as well as any exclusions. Use the same criteria in recruitment and invitation review.

◯ Confirmed ◯ Open ◯ Not applicable

3. Participants can see who is hosting and what any sponsor will do.

Explain the commercial role accurately. For example, distinguish a sponsor who opens the session from one who joins the discussion.

◯ Confirmed ◯ Open ◯ Not applicable

4. The agenda delivers the kind of session the invitation describes.

Check the time available for participant exchange, presentation and questions. Do not promise a peer discussion if almost all the time is allocated to a presentation.

◯ Confirmed ◯ Open ◯ Not applicable

5. The moderator has a question guide and relevant participant context.

Provide the purpose, main questions, known differences in experience and topics that need care. Do not include private participant details the moderator does not need.

◯ Confirmed ◯ Open ◯ Not applicable

6. People know whether the session is recorded and how comments may be used.

Explain whether comments can be quoted, named, summarized or shared. Resolve permission before recording or using contributions, not after a recap has been drafted.

◯ Confirmed ◯ Open ◯ Not applicable

EXECUTIVE DISCUSSION CHECKLIST

Review each item

7. The owner has confirmed the resources needed to deliver.

Check the format, time, people, venue or platform, budget and dependencies. Name who handles a late change, technical problem or absence.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

8. Invitations and reminders are accurate and consistent.

Check date, time zone, location or joining link, format, participant criteria and contact route against the agreed plan.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

9. The recap has an owner, review process and agreed use.

Name who drafts and approves it, who will receive it and how contributions are handled. Review any named quotation against the participant's permission.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

10. Follow-up reflects what each participant chose.

Keep interest, registration, attendance and requests for a commercial conversation separate. Attending the discussion does not automatically permit a sales call.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

For an in-person program

Also confirm the city, venue, participant travel assumptions, staffing and the costs or cancellation commitments already accepted. Use the executive experience brief for the fuller plan. Choose a roundtable, forum or summit because it fits the purpose and audience.

If the discussion is part of a wider CTN AON program, agree separately how research, content, virtual engagement or account and partner work will connect. Sponsorship does not include access to independent editorial coverage.

EXECUTIVE DISCUSSION CHECKLIST

Actions and the next review

Use the item numbers to connect these notes to the checks. Save and reopen the completed copy to confirm the entries remain. Use a PDF app that supports forms if your preview does not accept typing.

Open items and what must be settled before the next commitment

Up to 375 characters

Owner, next action and due date for each open item

Up to 375 characters

What will be reviewed next, by whom and when?

Up to 375 characters

Review open items with the owner before making the next commitment.