EXECUTIVE EXPERIENCE BRIEF

Plan the discussion and its purpose

Set the question, audience, responsibilities and next steps before committing to an in-person executive program.

> **Using the brief**
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> Save a copy before typing, or print it and write by hand. Fill in what you know; write "To confirm" for an open decision. Save and reopen your copy to check that entries remain. If your preview does not accept typing, open the saved file in a PDF app that supports forms. Each box is for short notes; use a separate page for a longer answer. Nothing is sent automatically.

A fictional example - An infrastructure services firm is considering a discussion about avoiding disruption during application changes. Participants should leave with questions to test their own change plan. The sponsor wants to understand which concerns leaders prioritize. Those are related but different purposes: participant value is not a promise of sales leads or permission to contact everyone afterward.

Business issue

What question should the discussion help people examine? For example: what makes an application change hard to approve or carry out?

Up to 300 characters

What leaders should gain

Describe what participants could learn or compare with peers, such as the questions they should ask before approving a change.

Up to 300 characters

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Learning goals and participants

What the client or sponsor hopes to learn

State the sponsor's learning goal separately from participant value. Do not make attendance, leads or sales an assumed result.

Up to 300 characters

Roles and experience

Which responsibilities and firsthand experience would make someone useful to the discussion? A title alone may not establish that.

Up to 300 characters

Audience criteria and exclusions

Write the eligibility rules the invitation team will use, including company context, region and anyone outside the intended audience.

Up to 300 characters

City, timing and format

Name the location, preferred date or window and format. If a choice is open, mark it as a preference rather than a confirmed arrangement.

Up to 300 characters

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Invitations and responsibilities

Who will invite participants, and by when

Name the invitation owner and dates for outreach, review and confirmation. Interest, registration and attendance are different stages.

Up to 300 characters

Program owner and backup

Who can make delivery decisions and handle changes? Name a backup who knows the plan.

Up to 300 characters

Budget and delivery responsibilities

Record the budget owner, who pays each supplier, and any deposits or cancellation commitments already accepted.

Up to 300 characters

How participant details and discussion content may be used

Agree who can see participant details and whether the session may be recorded, quoted, summarized or shared. Record the permissions needed for each use.

Up to 300 characters

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Sponsor role and follow-up

Sponsor role and expectations

Specify the sponsor's contribution, role in the session and agreed outputs. Keep independent editorial participation outside the sponsorship commitment.

Up to 300 characters

Who will coordinate the next steps

Name the owner for participant questions, the recap and any other agreed operational follow-up.

Up to 300 characters

How participants can choose to stay in touch

Explain how a participant can request a further commercial conversation and how that choice will be recorded. Attendance alone is not that request.

Up to 300 characters

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Support and review

Support your team needs

Describe the help you are considering, such as planning, recruitment or moderation. Any further research, content or advisory work needs an agreed scope.

Up to 300 characters

How and when you will review the results

Name the review date and evidence: for example, agreed deliverables, participant feedback, what was learned and permitted next steps. Do not assume an event interaction caused revenue.

Up to 300 characters

Before a commitment

Agree the purpose, audience, budget, timing and responsibilities before committing. Decide how participants can choose a further conversation. Sponsorship does not include access to independent editorial coverage.