Preparing an Executive Peer Discussion

A practical planning tool for marketing and program leaders

Plan a peer discussion around a choice your guests face. Prepare the question, people and moderator, then share a report guests can use.

Use buyer input to choose the topic

CIO Talk Network executive conversations help CTN AON understand the questions leaders face. We use focused polls and direct conversations with network members and relevant peers to understand current issues, test topics and plan programs.

For your program, record who contributed, when and what changed in the question. Keep the limits of that input alongside any conclusions, and let differing views change the focus.

BEFORE, DURING AND AFTER

BEFORE

Define the decision

Test the question with relevant buyer and peer input.

Choose and prepare contributors.

Agree what to produce and how the conversation may be used.

WHAT YOU WILL PREPARE

A brief with the buyer question
Who to invite
A guide for the moderator

DURING

Explore the choices

Ask about real decisions and examples.

Give people room to speak and compare their situations.

Capture differences and open questions.

WHAT YOU WILL PREPARE

Discussion notes
Choices and disagreements
Open questions

AFTER

Share what was learned

Separate what people said from your view of what it means.

Send a short report people can use.

Keep the question and background with each requested next step.

WHAT YOU WILL PREPARE

A short discussion report
Requested next steps
The next question to test

Use new questions to plan what to do next.

Use page 2 to plan with your team, page 3 to prepare the moderator and page 4 to plan the discussion report. Agree the work and what you will receive for each program.

Build a question worth discussing

Print and complete this page with your program team. Write a choice people face, then decide whose experience would help them make it.

1. Decision and why now

What is the audience trying to decide? Why does it matter now?

2. People and situations

Whose role, experience or situation makes this question relevant?

3. Question to test

Write one question that invites practical experience and differing views.

4. Input that could change the topic

What could buyers or peers tell you that would make you change the question?

5. Perspectives to bring together

Which different roles, situations and experiences should be in the room?

6. Useful takeaway

What should participants be able to carry into their next team conversation?

CHECK BEFORE INVITING

- ☐ The question has been tested with relevant input; its limits are recorded.
- ☐ The team knows why each person belongs and how to prepare them.
- ☐ The moderator and sponsor understand their roles.
- ☐ Guests know what may be shared, whose names may be used and what follow-up to expect.
- ☐ The team has agreed what to send afterward, who prepares it and when it is due.

Program owner	Discussion date	Report due date

Help peers compare real decisions

Use these four prompts to guide the discussion. Follow the examples and differences that matter to the room.

1. Start with the decision

What are you trying to decide, and what is holding it up?

Ask what is at stake, what has already been tried and who needs to act.

2. Ask for a concrete example

Walk us through a recent example. What happened, and what made the decision difficult?

Separate direct experience from predictions or secondhand views.

3. Explore contrasting experience

Who sees this differently? Which parts of your situation change the answer?

Invite missing perspectives and examine the choices behind different views.

4. Choose a useful next question

What question will you take back to your team, and what remains unresolved?

Name the evidence or perspective still needed for the next decision.

Keep the discussion useful

Invite quieter people to share their experience. Keep long answers on track and ask for specific examples. Bring promotional remarks back to the decision being discussed. Describe disagreements accurately rather than forcing agreement.

A SIMPLE NOTE-TAKING STRUCTURE

Example + context

What happened, and under which conditions?

Difference or choice

Where did people disagree or make different choices, and why?

Open question

What still needs evidence or another perspective?

Send a report peers can use

Agree what the short report should help people do before the discussion. Write it from the actual conversation. Keep different views, open questions and the limits of what you learned clear.

- Decision context: State the question, audience and situations that affect the choice.
- What was heard: Record actual examples and different views. Use names only as agreed.
- Interpretation: Explain how you reached your conclusions and what they cannot tell you.
- Open questions: Name what remains unknown and the evidence that could help.
- Next use: Give readers questions for their team, help with a decision or another item agreed in the brief.
- Follow-through: Keep the question and background with each request for another conversation. Name who will respond and when.

ILLUSTRATIVE FICTIONAL EXAMPLE

Using AI in customer service

This shows a planning structure, not collected research or a client result.

An imagined company is considering using AI to handle more customer service requests.

Question to test: Before we use AI more widely, who will handle requests it cannot resolve?

If relevant peers identify cost or data quality as the immediate obstacle, change the question you plan to explore.

Decisions for the system and for people

Which requests can AI handle, and which need a person?

Ownership

Who handles a request AI cannot resolve, and when should another team help?

Next evidence check

What would we need to check before using AI for more requests?