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Executive Briefing Template

**Your Company Logo Insert Partner Logo**

**Meeting with Name, Title, Company**

|  |
| --- |
| *Date:* |
| *Time:* |
| *Location:*  |

**Company Attendees (include bios and pictures)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Role in Meeting** | **History with partner** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Partner Attendees (include bios and pictures)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Role in Meeting** | **Has attendee met with** **your company previously?** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Agenda**

|  |
| --- |
| * Introductions
* Partnership Overview
* Priorities
* Open Discussion
 |

**Priority #1:** Sales Enablement

**Priority #2:** Marketing

**Priority #3:** Technology

**Executive’s POV Talking Points:**

**Executives expecations and commitments:**

**Success Stories:**

**Outstanding Issues:**

**Next Steps:**

**Revenue & Pipeline**