

Exec Briefing for <<Partnership>>

Exec Summary

<<Include all relevant points here, this may be the only section you have time to review with the executive>>

Overview of our recent progress with PARTNER and where we're headed together.

Partnership Objectives

<<Objective 1>>

<<Objective 2>>

<<Objective 3>>

This meeting with PARTNER will be successful if:

<<Goal 1>>

<<Goal 2>>

Specific asks / outcomes we want to achieve:

<<Ask 1>>

<<Ask 2>>

Hot Topics / Proposed Messaging:

<<Topic 1 + Context>>

<<Topic 2 + Context>>

Partnership Summary

What we want from this Partnership?	<<Objective 1>> <<Objective 2>> <<Objective 3>>
What PARTNER wants from this Partnership?	<<Objective 1>> <<Objective 2>> <<Objective 3>>
What is Working?	<<Area 1>> <<Area 2>> <<Area 3>>
What needs to be improved?	<<Area 1>> <<Area 2>> <<Area 3>>

Partnership Health

Area	Status	Owner	Learn More
Relationship	Healthy / Sick / Unhealthy	<<Owner>>	<<URL>>
Integrations KPIs	Healthy / Sick / Unhealthy	<<Owner>>	<<URL>>
Co-marketing	Healthy / Sick / Unhealthy	<<Owner>>	<<URL>>
Growth	Healthy / Sick / Unhealthy	<<Owner>>	<<URL>>

Who we will be meeting (if page is to prepare for an Exec Meeting)

<<For exec briefings, add a bio on the people we will be meeting and any context / learnings from previous sessions>>

History of our Partnership

<<If relevant, add some context on the history of the partnership. This will be most relevant for initial meetings with execs>>

Major Initiatives with PARTNER

<<Provide a summary of all active programs, especially if they may be discussed during the session>>

Initiative	Type	Goal(s)	Status	Risks	Owner
<<Integration>>	Integration / co-marketing / other		On track / At Risk / Off Track		
<<GTM campaign>>	Integration / co-marketing / other		On track / At Risk / Off Track		
<<Other>>	Integration / co-marketing / other		On track / At Risk / Off Track		

PARTNER Perspective (what is happening in their world?)

<<Add any recent news or areas of interest. This can also help to build empathy for any challenges they may be having. Good sources here are quarterly reports, press and recent news.

e.g.

- M&A activity
- New product launches
- New partnerships, etc.>>