

# World-Class Advisory Board Checklist

By Sean Geehan



## Executive Involvement / Connection to Strategy

- ☐ Clear understanding of company and business priorities through stakeholder interviews
- ☐ Alignment of all stakeholders to objectives, Charter, agenda, and firm strategy
- ☐ Executive education, support, and role development

## Membership Design / Member Recruiting & Commitment

- ☐ Development of Advisory Board Charter yielding accurate and transparent description of initiative
- ☐ Segmentation of candidate companies, construction of member profiles, and selection of target candidates
- ☐ Best practice based recruiting process, materials, and communications supported by recruitment coaching which yields 70%+ success rate in securing executive level board members
- ☐ New member orientation program to integrate new participants beyond Meeting One



Sean Geehan is CEO and Founder of Geehan Group and National Best Selling Author of *The B2B Executive Playbook*. With over 20 years of experience in the area of B2B consulting services, Sean is a recognized leader in guiding B2B executives to building sustainable, predictable, profitable growth for their organizations.

## Content Design / Meeting Experience

- ☐ Development, management, and incorporation of findings from all member surveys and executive interviews to align board and meeting objectives
- ☐ Member preparation and expectation setting
- ☐ Design of actionable discussions to generate REAL post-meeting activity – selection of content, agenda sequencing, and discussion approach based on strategic business and member priorities
- ☐ 80/20 Rule. Meeting is designed for you to listen and learn; your customers/prospects should be talking 80% of the time, you 20%
- ☐ Business objective-based issue tracking and action summary to promote company's engagement with senior leadership to deliver on promises
- ☐ Preparation and run-through with company presenters for all member meetings and conference calls
- ☐ Significant executive-level, strategic facilitation skills to guide host executives and enhance member contributions
  - ☐ Best-in-class meeting facilitation – skilled at neutralizing “complainers”, “staying on track,” etc.
  - ☐ Facilitation training and coaching for all presenters
- ☐ Meeting logistics that maximize overall meeting experience

### Follow-up Actions / Results

- ☐ Executive commitment to follow-up action items
- ☐ Actionable post-meeting wrap-up communicated to members
- ☐ Ongoing relevant member engagement along with subcommittee development and management
- ☐ Development and execution of internal and member communication plans to maintain momentum and align company and members for maximum participation and engagement
- ☐ Timeline based upon experience along with a focus on the critical path for execution
- ☐ Resource alignment, planning, and scheduling of all identified action items
- ☐ Overall project management, with scheduled status updates with company program manager
- ☐ Establishment and management of initiative/program scorecard
- ☐ Confident that every detail of initiative will be addressed to ensure absolute success

If you have additional questions, please contact

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