

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

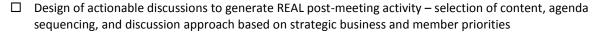
Membership Design / Member Recruiting & Commitment

- ☐ 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

Content Design / Meeting Experience

Development, management, and incorporation of findings from all member
surveys and executive interviews to align board and meeting objectives





□ 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



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.



Follow-up Actions / Results

Ш	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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