

Briefing Guidelines

Customer Involvement Event

This is a list of topics you might want to include in your Briefing. It is not the intention that you should include each and every one of these nor is the list comprehensive.

- (1) Explain who you are, what your job is and how you are involved in the topic(s) to be explored
- (2) Thank everyone for coming and explain why it is important to get customer input on this issue
- (3) Explain the areas you are going to cover
- (4) If there are other people also carrying out a Briefing, say how what you are going to say fits in with what they will cover
- (5) Background to the topic and why it is being worked on
- (6) Why the topic is important (to the organisation, to the customers, to others)
- (7) Key issues that need to be tackled
- (8) Good ideas from elsewhere (competitor or benchmarking information)
- (9) Any other relevant background information
- (10) The story so far, key pieces of work that have been done, who has been involved, any sticking points
- (11) Proposals
- (12) Anything you are particularly keen to find out from the group
- (13) How the outputs will be used
- (14) Finish by recapping what you have covered and saying thank you again

Notes Consider the medium used carefully. A Briefing always has far more impact if key points are presented on flipchart and in Project Events we usually recommend PowerPoint as an alternative only if there are pictures or graphs to show. However, PowerPoint may be more appropriate for customers, for reasons of expectations and accessibility. It also allows more use of pictures and appropriate branding.

Time Discuss this with your Facilitator but ideally no more than 30 minutes.