



Descriptions for Most Common Briefing Program Positions

Briefing Coordinator

Duties and Responsibilities

- Responsible for general administrative support of Briefing Program team and visiting customers
- Prepare recurring and routine internal reports as well as disseminate monthly summaries to key stakeholders
- Maintain inventory of all supplies and customer giveaways
- Maintain professional environment in Briefing Center
- Organize internal meetings and non-briefing events that take place in the Briefing Center
- Personalize customer collaterals and welcome screens
- Provide logistical/concierge support for customers and account teams if needed including dining, transportation, lodging, entertainment
- Manage vendor relationships with catering, hotels, transportation, gifts
- Provide concierge-style service to all customers; meet and greet customers as they arrive at reception and escort them to the EBC and to their briefing room (in-person or virtual).
- Provide general support and initial troubleshooting for customers with questions or issues during briefings
- Serve as point of contact for security, facilities, A/V, etc.
- Schedule all engagements and events in coordination with Briefing Program Manager/Director and Briefing Consultant
- Maintain inventory of marketing collateral
- Maintain the briefing schedule and share it daily with security and lobby receptionist
- Handle updating all video displays that list customer engagements and events
- Collect any necessary information for customer engagements with account team (time, date, catering, hotels, special requests, etc.)
- Prepare all customer and account team name badges
- Coordinate the ordering of catering for all engagements including the setup/breakdown and cleanup
- Manage all catering procurement details (coordination for delivery, collection of receipts, and recording billing information)
- Process all facility related expenses and reconcile regularly
- Handle the distribution and collection of briefing feedback forms, including entering feedback data into the briefing management system and providing results to the account team
- Manage pre-engagement arrangements prior to the start of the briefing, which includes the cleaning and setup (meeting logistics – agenda, feedback forms, name tents, badges, A/V setup, pad/pen, etc.)
- Refresh coffee in briefing rooms as needed
- Assist with any ad hoc customer or account team requests (local restaurants, hotels, theaters, events, etc.)
- Participate in regular meetings with Director to discuss upcoming engagements



Descriptions for Most Common Briefing Program Positions

- Maintain relationship with Facilities management to address facility-related issues or needs (plants, light bulbs, AV maintenance, replacement, etc.)
- Manage kitchen including daily cleaning, maintenance and inventory; may also require stocking beverages, snacks and supplies on a regular basis
- Work with Facilities management to ensure the Briefing Center meets expectations with regard to appearance, cleanliness, functionality and overall quality experience
- Assist with planning events and/or offsite meetings and provide logistics support
- Assist Director/Program Manager on special projects

Skills and Knowledge

- Attention to detail
- Diplomacy
- Professional appearance and manner
- Ability to work effectively with people at all levels
- Willing to do “whatever it takes” in the interest of a world class customer and account team experience
- Strong interpersonal and customer service skills
- Demonstrated ability to problem-solve
- Strong administrative skills
- Intermediate Microsoft Office Suite, Google Workspace, and/or Apple Desktop skills
- Ability to prioritize and manage multiple tasks simultaneously
- Ability to work independently with minimal supervision
- Strong verbal and written communication skills
- Demonstrated ability to work in a fast-paced work environment
- Ability to deal with last-minute changes and deadlines while showing grace under pressure



Descriptions for Most Common Briefing Program Positions

Briefing Consultant

Duties and Responsibilities

- Evaluate briefing requests based on sales impact, revenue potential, level of attendees, market segmentation, stage in sales cycle, etc.
- Consult with account team to complete briefing request form
- Act as consultant to account manager from initial briefing request to create agenda, source discussion leaders, and lead prep calls
- Work with senior leadership, sales, marketing, and other areas of the company to create, plan and execute customized briefings
- Plan briefings that meet the objectives of both the customer and account team
- Facilitate prep and planning calls with account team and discussion leaders to ensure discussion leaders understand briefing objectives
- Provide feedback to discussion leaders regarding content and delivery and to sales team
- Populate and keep briefing management system up to date to reflect agenda changes
- Stay abreast of new product developments
- Manage special projects as assigned
- Consult with and coach account managers on successful briefing execution
- Build and maintain relationships with markets teams, product managers, executives and executive admins regarding processes and procedures necessary to execute successful briefings
- Conduct follow-up on each briefing, gathering account manager and customer feedback, identifying post-briefing opportunities, report on conclusions and suggestions.

Experience and skills

- Customer service, sales, or marketing
- Company product and services knowledge or aptitude
- Company Industry knowledge
- Knows appropriate subject matter experts in various company organizations
- Effective written and verbal communications
- Negotiation and influencing skills
- Performs well under pressure/deadlines
- Problem-solving skills
- Detail oriented multi-tasker
- Works well with a team
- Diplomatic with professional appearance and manner
- Committed to excellence
- Project management



Descriptions for Most Common Briefing Program Positions

Senior Briefing Consultant

Duties and Responsibilities

- Evaluate briefing requests based on sales impact, revenue potential, level of attendees, market segmentation, stage in sales cycle, etc.
- Consult with account team to complete briefing request form
- Act as consultant to account manager from initial briefing request to create agenda, source discussion leaders and lead prep calls
- Work with senior leadership, sales, marketing, and other areas of the company to create, plan and execute customized briefings
- Plan briefings that meet the objectives of both the customer and account team
- Facilitate prep and planning calls with account team and discussion leaders to ensure discussion leaders understand briefing objectives
- Consult regarding the selection of appropriate presentation content and media
- Provide feedback to discussion leaders regarding content and delivery and to sales team
- Populate and keep briefing management system up to date to reflect agenda changes
- Stay abreast of new product developments
- Manage special projects as assigned
- Consult with and coach account managers on successful briefing execution
- Build and maintain relationships with markets teams, product managers, executives and executive admins regarding processes and procedures necessary to execute successful briefings
- Conduct follow-up on each briefing, gathering account manager and customer feedback, identifying post-briefing opportunities, report on conclusions and suggestions.
- Facilitate on-site, virtual, and hybrid briefings: open briefing, facilitate introductions, validate objectives, introduce discussion leaders, debrief between topics, note action items and recap, close briefing
- Evaluate the briefing throughout and purposely intervening to keep the meeting on track with client and account team objectives
- Present the corporate overview, demonstrations, or other selected agenda items in briefings
- Capture key Voice of the Customer insights and feedback for input to corporate business intelligence systems

Experience and skills

- Customer service, sales, or marketing
- Company product and services knowledge or aptitude
- Company industry knowledge
- Knows appropriate subject matter experts in various company organizations
- Effective written and verbal communications



Descriptions for Most Common Briefing Program Positions

- Negotiation and influencing skills
- Performs well under pressure/deadlines
- Problem-solving skills
- Diplomacy
- Multi-tasking
- Works well with a team
- Professional appearance and manner
- Detail-oriented
- Committed to excellence
- Project management
- Facilitation skills
- Presentation skills



Descriptions for Most Common Briefing Program Positions

Briefing Program Manager/Director (Center Manager if one location)

Duties and Responsibilities

- Set program goals and objectives
- Secure annual funding
- Market and evangelize the briefing program internally
- Create and revise processes and procedures in support of the program's overall objectives
- Create, drive, and oversee effective scheduling policies for briefings
- Support corporate sales objectives by providing a professional solutions demonstration and meeting environment in which to conduct briefings
- Develop partnerships with senior management, product marketing, segment and solution marketing, sales management and R&D to recruit, retain, recognize, and develop discussion leaders
- Oversee and maintain responsibility for the briefing facility, including operating infrastructure, customer-focused logistics, and relationships with external and internal vendors and partners
- Develop and be accountable for the operating budget
- When appropriate, lead the build out of a new center(s) working with vendors, partners, suppliers, and project manager
- Train and develop Briefing Program team members
- Manage daily operation of center(s)
- Compile, analyze, and manage reporting of all significant program metrics
- Assess program quality and performance; implement quality improvements
- Lead discussions, deliver presentations or demonstrations and otherwise execute/participate in briefings as needed
- Facilitate on-site, virtual, and hybrid briefings as needed: open briefing, facilitate introductions, validate objectives, introduce discussion leaders, debrief between topics, note action items and recap, close briefing
- Oversee strategy and maintenance of briefing program intranet website
- Implement and manage a Briefing Management System
- Actively participate in industry associations
- Strategize future plans
- Assess staffing needs, appropriate resources, staff and equipment
- Maintain relationships with internal users and senior management to ensure objectives are being met
- Capture key Voice of the Customer insights and feedback for input to corporate business intelligence systems



Descriptions for Most Common Briefing Program Positions

Knowledge

- Company products and services
- Company industry trends
- Competitors' offerings
- Thorough understanding of resources available for presentations and demos

Skills

- Excellent verbal and written communication
- Effective interpersonal skills at all levels
- Presentation, facilitation, and demonstration skills
- Well-developed prioritization, organization and planning skills
- Complex project management
- Multi-tasking
- Works effectively across all levels in the organization
- Diplomacy
- Leadership
- Meeting planning
- Excellent judgment
- Functions well under pressure
- Ability to participate as a team member and team leader
- Ability to facilitate collaboration by providing leadership in a cross-discipline team environment
- Adaptable to a rapidly changing environment
- Possess the ability to handle ambiguous work problems and/or environments
- Is an independent self-starter capable of identifying, assigning or completing tasks with a minimum level of supervision
- Inspires others to achieve breakthrough performance
- Ability to balance needs of corporation against individual and group needs
- Ability to diffuse conflict and/or resolve problem situations
- Ability to visualize strategic direction and create structures and policies to attain a vision
- Motivational skills
- Ability to conduct business at an executive level



Descriptions for Most Common Briefing Program Positions

Operations Manager

Duties and Responsibilities

- Acts as a vital member of the Briefing Program team, taking accountability for the management of a wide range of initiatives
- Manage center operations with internal partners and external vendors
- Track briefing program impact and managing events from initiation to completion
- Oversee operations to ensure production efficiency, quality, and service: Manage incoming customer visit and internal meeting/event requests. Manage catering vendor relationship and standards. Manage audio/visual maintenance including service level agreements
- Develop and refine operational support tools to simplify process and mitigate risk. Manage vendor relationships and allocated budgets to increase scheduling tool functionality with overall customer visit process. Work with other business functions to integrate CRM reporting into scheduling tool
- Manage overall broad facets of customer engagements. Standardize content and messaging. Schedule all internal and external requests along with appropriate level of experts/discussion leaders necessary for audience. Lead majority of requests originating from internal and community group requests. Responsible for building training program for new program team members
- Host and plan customer engagements; Coach sales leads on strategy for customer engagements
- Write copy for event communications and printed material
- Manage multiple details and meet deadlines in a fast-paced environment.
- Provide budget coordination, including the planning and tracking of purchase order issue, invoice approvals, actual vs. planned spend, and forecast updates
- Project management, as assigned

Knowledge and Skills

- Bachelor's degree and 5 to 7 years of directly relevant work experience
- Strong organizational, project management, communication, and interpersonal skills
- Self-starter, with a proven ability to manage multiple projects and details while working independently
- Strong attention to detail, and an appropriate sense of urgency, prioritization, and tenacity
- Sufficient experience to successfully navigate complex organizations and effectively coordinate work among a broad range of colleagues, consultants, and vendors
- Ability to drive results absent formal authority or lines of accountability
- Ability to work across organizational functions and business units with individuals in all levels of the organization and enjoy success as part of a working team



Descriptions for Most Common Briefing Program Positions

- Computer and web literate, with proficiency in office suite software and the web, and the ability to learn new computer systems.



Descriptions for Most Common Briefing Program Positions

Technology Manager

Duties and Responsibilities

- Lead the end-to-end strategy and execution plan development for the customer briefing experience, technology experiences, demos, interactive vignettes and displays – on-site, virtual, and hybrid
- Drive success metrics, feedback loops, collection of customer feedback, and reporting to ensure that technology experiences are landing with customers and supporting advocacy and sales velocity
- Develop and lead a community of cross-company experts with the goal of showcasing the best technologies, demos, and interactive experiences within the briefing center
- Manage a proactive device and technology lifecycle planning process
- Understand current and emerging technology trends and product roadmaps, developing content refresh strategies to ensure continual relevance for the briefing center’s audience
- Deep participation in evolving center common areas and briefing rooms to create immersive technology experiences
- Work closely with Executive Engagement leadership, facility operations, and EBC teams to develop and maintain sustainable customer experience catalog topics, demo support models, facilitators, infrastructure, and execution plans
- Define and continuously evolve customer engagement strategy, including pre, day-of, and post-briefing engagement, customer amenities and work closely with the EBC operations team to execute the enhanced processes
- Develop and manage SoW and KPI’s (key performance indicators) for vendor teams that deliver and support technology experiences
- Drive strategy for scaling technology and customer experiences and best practices across the global briefing team, global executive events, and other customer facing programs/facilities
- Work with content experts around the company, leveraging existing content to develop scripts that enable repeated delivery of meaningful and cohesive customer story across multiple product, services and devices

Knowledge and Skills

- Strategic leader with strong ability to execute and drive for results
- Prior technology evangelism experience and deep understanding of company solutions
- Experience in executive engagements with successful content, demo, and scenario delivery
- Program management capabilities, experienced in planning and managing technology design and implementation projects across multiple geographies



Descriptions for Most Common Briefing Program Positions

- Ability to effectively communicate to all levels within company and CXO customers
- Experience managing virtual and vendor teams, developing scopes of work/KPI, managing performance to KPI's, forecasting budget requirements, and managing within budget
- Excellent interpersonal skills to build positive working relationships across groups and management levels
- Insight into industry trends and top CXO challenges
- 5+ years of related experience in IT with strong understanding of company offerings
- 5+ years of related customer facing project/program management experience
- Experience with enterprise customers, possessing deep insight into key trends and CXO challenges, and ability to source and present relevant scenarios effectively
- Successful management experience of small to medium sized teams
- Bachelor's Degree (B.S./B.A.), MBA preferred



Descriptions for Most Common Briefing Program Positions

Content Strategy Manager

Duties and Responsibilities

This role is instrumental in planning, creation, governance and distribution of strategic communications, including Interactive Content while establishing strategy and guidelines that add real value to the user and contribute to tangible brand goals and business objectives.

This position serves as an expert in strategically marrying Briefing Program communications to, business goals, corporate value propositions and customer needs. This role synchronizes content strategy with the creative, user experience and technical components to fully realize meaningful, interactive experiences, as well as other aspects of the Briefing Program, including customer presentations, tours and internal sales training.

Content Strategy Manager determines what content is needed in the center, how that content will be obtained and maintained, as well as ensure that it is useful, usable, and desirable.

PRINCIPLE DUTIES:

- Develop a complete content strategy for technology showcase and briefing program
- Develop new and existing content, which delivers maximum benefit to clients. Create new content and edit existing content in coherence with the overall strategic direction of the company. Manage vendor relationships and allocated budgets to create new assets for display in customer centers and in various digital platforms, including: printed signage and graphics, 3D architectural renderings, illustrations, videos, murals. Support content development or changes per-customer visit. Manage content and overall build of event applications
- Work with subject matter experts throughout the entire corporate organization to both maintain and update existing content within a variety of mediums, and create new content based on business needs, changes or new product / service offerings
- Champion and increase understanding of content services within the business
- Define asset types appropriate to support content, work with marketing and sales to support their vision and direction
- Collaborate with marketing, marketing communications, public relations, and web teams to leverage existing content and media coverage
- Lead strategy around the development and testing of CMS platforms that will allow the briefing team more flexibility, improve tracking, provide metrics, and function as a responsive tool for global deployment of interactive content
- Develop and manage Content Management System (CMS) and governance models, including processes and dependencies such as key roles (e.g. author, editor, approver, reviewer etc.) and responsibilities per



Descriptions for Most Common Briefing Program Positions

role. Develop, maintain, and enforce editorial style guidelines. Identify key processes, procedures and dependencies. Assess, catalog, and organize technology showcase content. Assign and track new content development

- Interpret business objectives and user needs into interactive content
- Create content used to market the Briefing Program. This includes, creating brochures and fact sheets, writing feature articles and blogs for internal distribution
- Manage internal briefing program management system site for the briefing program. This includes design development, page creation, copy and content edits and management of vendor relationships when necessary
- Work closely with the Briefing Program Director to develop training program for subject matter experts and executives
- Host and plan customer engagements via Customer Communications Management platform. Coach sales leads on strategy for customer engagements

Knowledge and Skills

- A bachelor's degree and 5 to 7 years of directly relevant work experience. Agency experience, particularly as traffic or account coordinator is highly desirable
- Strong organizational, project management, communication, and interpersonal skills
- Self-starter with a proven ability to manage multiple projects and details while working independently
- Strong attention to detail, and an appropriate sense of urgency, prioritization, and tenacity
- Sufficient experience to successfully navigate complex organizations and effectively coordinate work among a broad range of colleagues, consultants, and vendors
- Ability to drive results absent formal authority or lines of accountability
- Ability to work across organizational functions and business units with individuals in all levels of the organization and enjoy success as part of a working team
- Computer and web literate, with proficiency in various office software platforms and the web, and the ability to learn new computer systems.