

BRAD Meeting Preparation Template

Below is a template for preparing a Business Review and Development Meeting (“BRAD”). Adjust the topics and headers which have been included here simply to prompt you.

<p>LOGISTICS AND PLANNING: What existing formats could be used (hint: no point re-inventing the wheel). Attendees, how/have they been formally invited? Who else from our side? Location, venue and facilities. Have they called this meeting or have we? Who provides amenities?</p>
<p>STRATEGY AND SCOPE: Overall objective for the meeting (hint: not a SMART sales objective in this case) Review/re-assessment of customer’s strategies and plans. Re-affirmation of ours. Categories and projects to be covered by this BRAD.</p>
<p>“WHERE ARE WE NOW” STUFF: Situation analysis (our format or their required format?) What performance data needs to be available? By category/project. What analysis and graphic presentation is needed? What have been the activity levels against plan, variance and diagnosis? What has worked well? What has not worked well? What actions are needed?</p>
<p>SWOT: What strengths to leverage, weaknesses to address, opportunities to exploit, threats to counter?</p>
<p>What will be our objectives, strategies and tactics for the next period? What will be the challenges for the next period?</p>
<p>What will be the specific action plans? (hint: “R A C I” responsibility, accountability, consulted, informed)</p>
<p>Do the 6 POP Drivers under CatMan give us a useful framework for any of our projects? What control measures are needed to monitor our joint programs this period?</p>