

EVENT BRIEFING BOOK TEMPLATE

◆ How to use this template

Note *Company XYZ, the restaurant, guests, and contact details are all fictional, for illustration only.*

This is a worked example of a Briefing Book, built around a fictional dinner so the structure is easy to copy. Every name, company, restaurant, and contact detail below is invented. Swap in your own event details, guest list, and notes section by section. Sections built around the 6-Part Dinner Framework from the *Hosting Effective Dinners for Startups* playbook are marked as you go.

1 • Event snapshot

Objective	Following a strong response to Company XYZ's product-led content on the future of GTM hiring, we are hosting a curated dinner for revenue leaders navigating how AI is reshaping who they hire. The goal is to establish Company XYZ as a trusted voice on GTM team design, deepen relationships with active pipeline and existing customers, and surface how revenue leaders are actually restructuring their hiring plans for the AI era.
Target audience	VP- and C-level Sales, Marketing, and RevOps leaders at Series B to D SaaS and services companies, plus existing customers and one GTM advisory partner.
Format	Curated dinner with moderated discussion
Theme	How to Hire GTM Teams of the Future
On-site team	• Rachel Ingram - CMO (emcee) • Nathan Col - Head of Sales • Devon Blake - Customer Success Lead
Branding / Swag	• Branded cocktail napkins and stirrers at the bar • Branded menus at each place setting

2 • Run of show

5:30 PM

On-site team arrival and setup.

6:00 PM

Cocktail reception, arrivals. On-site team works the room as guests arrive.

6:35 PM

Guests seated. Welcome remarks from Rachel Ingram (CMO): who is in the room, why, and the evening's framing question.

6:45 PM

Anchor Content: 5-10 minute framing from Elena Marsh on how she rebuilt her GTM org chart around AI-augmented reps.

7:00 PM

Facilitated discussion (see Conversation guide, Section 6).

8:15 PM

Dessert networking break. Dessert is served at a side table so guests can move and network freely.

8:45 PM

Thank each guest individually. Take photos.

9:00 PM

Event concludes. Collect conversation notes from team.

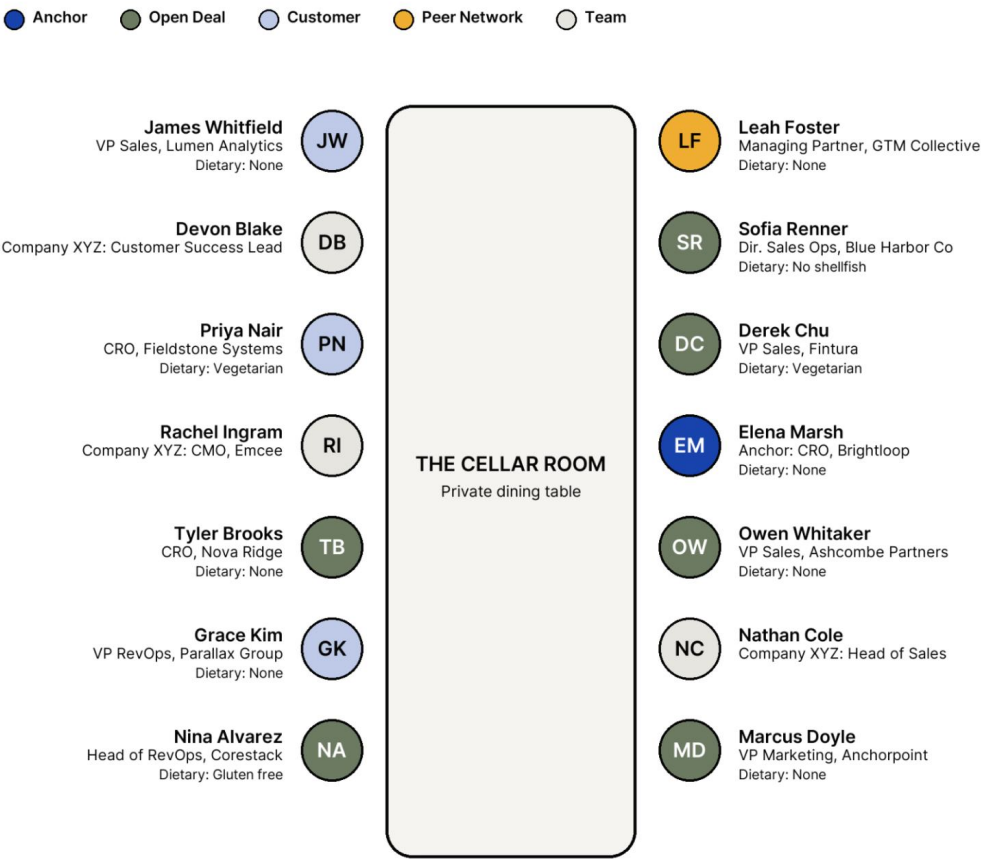
3 • Venue & arrival

Venue	Amaro & Ash, The Cellar Room
Address	482 Franklin Avenue, Los Angeles, CA 90026
Capacity	16 seated (private room)
Venue Contact	Marisol Vega, Venue Manager, (323) 555-0148, marisol@amaroandash-example.com
A/V	None required

4 • Seating Chart

Per the playbook: the seating chart is one of the most underutilized tools in event marketing. Every pairing below is intentional, not left to chance. Dietary restrictions are noted for catering reference.

Seating chart: guests and on-site team



5 • Guest list & prioritization

Template note All names, titles, companies, emails, and LinkedIn URLs below are fictional placeholders.



Elena Marsh Anchor

Chief Revenue Officer, Brightloop Pipeline: N/A

Email: elena.marsh@brightloop-example.com **LinkedIn:** linkedin.com/in/elena-marsh-example

Dietary: None **Account Owner:** Jordan Pierce, AE

Notes: Anchor guest. Rebuilt her SDR org last year around a smaller number of AI-augmented reps. Ask what roles she is hiring for now that did not exist on her team two years ago, and which roles she has stopped backfilling.



Derek Chu Open Deal HIGH PRIORITY

VP Sales, Fintura Pipeline: \$85,000 ARR

Email: derek.chu@fintura-example.com **LinkedIn:** linkedin.com/in/derek-chu-example

Dietary: Vegetarian **Account Owner:** Jordan Pierce, AE

Notes: Late-stage deal, evaluating against one incumbent competitor. Champion confirmed, budget sign-off pending. Ask what is driving his SDR redesign.



Owen Whitaker Open Deal HIGH PRIORITY

VP Sales, Ashcombe Partners Pipeline: \$61,000 ARR

Email: owen.whitaker@ashcombe-example.com **LinkedIn:** linkedin.com/in/owen-w-example

Dietary: None **Account Owner:** Casey Nolan, AE

Notes: Competitive deal, currently leaning toward the incumbent renewal. Ask what his hiring plan looks like for next year and whether it still resembles this year's.



Marcus Doyle Open Deal

VP Marketing, Anchorpoint Pipeline: \$54,000 ARR

Email: marcus.doyle@anchorpoint-example.com **LinkedIn:** linkedin.com/in/marcus-doyle-example

Dietary: None **Account Owner:** Morgan Hayes, AE

Notes: Competitive deal, currently leaning toward the incumbent renewal. Ask what his hiring plan looks like for next year and whether it still resembles this year's.



Grace Kim Customer

VP RevOps, Parallax Group Pipeline: \$50,000 ARR

Email: grace.kim@parallaxgroup-example.com **LinkedIn:** linkedin.com/in/grace-kim-example

Dietary: None **Account Owner:** Ava Simmons, CSM

Notes: New logo opportunity, comparing three vendors. Main concern is preserving team culture while restructuring roles, not cost. Do not pitch, let him hear from Grace Kim about how her team adjusted.



James Whitfield Customer

Chief Revenue Officer, Nova Ridge Current ARR: \$45,000 | Expansion: \$15,000 ARR

Email: tyler.brooks@novaridge-example.com **LinkedIn:** linkedin.com/in/tyler-brooks-example

Dietary: None **Account Owner:** Jordan Pierce, AE

Notes: Customer for 8 months, strong advocate. Used the platform to redesign his SDR team structure. Worth a light conversation about the hiring analytics add-on if it comes up naturally.



Tyler Brooks Open Deal

Chief Revenue Officer, Nova Ridge Pipeline: \$40,000 ARR

Email: tyler.brooks@novaridge-example.com **LinkedIn:** linkedin.com/in/tyler-brooks-example

Dietary: None **Account Owner:** Jordan Pierce, AE

Notes: Early conversations only, openly skeptical that AI changes who you hire rather than just how reps work. Responds well to peer proof over vendor claims.



Priya Nair Customer

Chief Revenue Officer, Fieldstone Systems Current ARR: \$38,000

Email: priya.nair@fieldstone-example.com **LinkedIn:** linkedin.com/in/priya-nair-example

Dietary: Vegetarian **Account Owner:** Ava Simmons, CSM

Notes: Reference customer, has agreed to speak positively about her team's restructuring if asked. Let her tell her own story rather than prompting her to sell for us.



Nina Alvarez Open Deal

Head of RevOps, Corestack Pipeline: \$32,000 ARR

Email: nina.alvarez@corestack-example.com **LinkedIn:** linkedin.com/in/nina-alvarez-example

Dietary: Gluten free **Account Owner:** Casey Nolan, AE

Notes: Early-stage evaluation, sourced from a webinar two weeks ago. Curious about hybrid AE/CS roles but has not built a business case internally yet. Good candidate for James Whitfield to speak to peer-to-peer.



Sofia Renner Open Deal

Director of Sales Operations, Blue Harbor Co Pipeline: \$28,000 ARR

Email: sofia.renner@blueharbor-example.com **LinkedIn:** linkedin.com/in/sofia-renner-example

Dietary: No shellfish **Account Owner:** Morgan Hayes, AE

Notes: Mid-funnel, budget holder but not final decision maker. Needs a clear way to quantify hiring ROI to bring back to her VP, who is not attending tonight.



Leah Foster Peer Network

Managing Partner, GTM Collective Pipeline: N/A

Email: leah.foster@gtmcollective-example.com **LinkedIn:** linkedin.com/in/leah-foster-example

Dietary: None **Account Owner:** N/A, advisory relationship

Notes: Not a sales target. Advises several GTM leaders in this room's peer group on org design. Good listening session, ask what hiring patterns she is seeing repeat across her portfolio this quarter.

6 • Conversation guide

Per the playbook, prepare 2 to 3 questions in advance that address guests' known challenges. The host should feel comfortable calling on specific guests by name.

1

What does your GTM org chart look like today that would not have existed two years ago?

2

[Directed at Elena Marsh] What made you finally rethink the SDR role structure on your team?

3

Where is AI actually changing who you hire, versus just changing how your existing reps work?

7 • Follow up checklist

Within 24 hours:

- ◆ Personal thank-you from the host who extended each invite, not a templated note. Reference something specific that each guest said. Propose one concrete next step per guest.

Within 48 hours:

- ◆ Log attendee notes, themes, and next steps in the CRM. Flag any deal-relevant conversation for the sales team.

Group follow-up to all attendees:

- ◆ Include photos, a short recap of themes discussed, and everyone's LinkedIn profiles

Debrief internally:

- ◆ What was each guest's biggest stated hiring challenge, what competitors were mentioned, what themes repeated across conversations.