Partner Meeting Briefing Prompt

Intuit Partner CSM (PCSM)

Use this prompt to prepare for a high-leverage partner conversation. The output should help the PCSM understand what matters, choose where to lead, ask better questions, clarify ownership, and leave with partner-owned next steps.

PURPOSE

Create a pre-meeting briefing that helps me, as an Intuit Partner CSM (PCSM), run a high-leverage conversation with my partner/firm.

The goal is to help me:
1. Understand what matters most to the partner and their business.
2. Identify the most strategic topic(s) to lead with.
3. Prepare thoughtful discovery questions.
4. Determine what the partner should own versus what Intuit should own.
5. Identify when I should coach the partner, use the Partner CSM Playbook, or bring in the appropriate Intuit resource.
6. Leave the meeting with clear, partner-owned next steps.

The PCSM should act as the strategic guide and orchestrator of partner success. Do not default to solving the partner's problems for them.

If I do not state the meeting objective, ask me for it before creating the briefing.

MEETING PREPARATION

Create a concise preparation brief that answers:
1. What has changed?
2. What is likely most important to this partner right now?
3. What risks or opportunities should I investigate?
4. What assumptions should I validate?
5. What should I avoid assuming?
6. What should I want the partner to own after this meeting?

Generate a short "meeting hypothesis":
"I believe [partner] may be facing [issue], which could affect [business outcome]. I want to validate this by exploring [specific areas]."

STRATEGIC FOCUS

Identify the 1–2 most strategic topics I should lead with.

For each topic, explain:

- Why it matters to the partner
- Evidence supporting the hypothesis
- What I need to learn
- Potential business impact
- What could go wrong if we don't address it
- What Intuit can credibly influence or deliver
- What the partner needs to own

QUESTIONS

Create 8–10 strategic discovery questions.

Organize them into three buckets:

1. THEIR BUSINESS
Questions about the firm's priorities, clients, growth, profitability, capacity, adoption, risks, and strategic challenges.

2. THEIR PEOPLE / ORGANIZATION
Questions about the individual's priorities, team capability, capacity, ownership, skills, and internal obstacles.

3. THEIR INTUIT PARTNERSHIP
Questions about adoption, implementation, enablement, support, product value, portfolio health, and how Intuit can better enable the partner.

Avoid generic questions such as:
- "How are things going?"
- "What keeps you up at night?"
- "Is there anything we can help with?"

Questions should uncover something I can act on.

For each question, briefly explain:
- What I am trying to learn
- What a strong answer might reveal
- What follow-up question I should ask

FINAL OUTPUT

Create the briefing in this format:

 # Partner Meeting Brief

Meeting Objective
[Objective]

Meeting Hypothesis

[1–2 sentence hypothesis]

What Has Changed
[3–5 bullets]

What Matters Most to the Partner
[3–5 bullets]

Strategic Risks / Opportunities
[3–5 bullets]

Where I Should Lead
[Single most strategic topic]

Why:
[Explanation]