

Tim Connor, CSP Client Pre-Program Questionnaire

* Client Information *

2 Client: _____

Contact: _____ Position: _____

Tel No: _____ Fax: _____

E- Mail: _____ Other: _____

Web Site: _____

Additional Contact: _____ Position: _____

Tel No: _____ Fax: _____

E- Mail: _____ Other: _____

Mail Address: _____

Ship Address: _____

City: _____ State: _____ Zip: _____

2 Other Key Contacts for this program:

Name: _____ Position: _____

Name: _____ Position: _____

Name: _____ Position: _____

Name: _____ Position: _____

Name: _____ Position: _____

Name: _____ Position: _____

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* Program Details *

2 Meeting Date (s): _____

2 Time frame for my presentation: Start: _____ End: _____ Total Length: _____

2 Meeting Location: _____ Tel No: _____

2 Meeting Room: _____

2 On Site Contact: _____ Position: _____

2 City: _____ State: _____ Zip: _____

2 Name of speaker's introducer: _____ Position: _____

2 What is the appropriate attire at the program: _____

2 What takes place just before Tim's presentation: _____

2 Will there be any breaks during his session: _____

2 Purpose: _____ Length: _____

2 What follows Tim's presentation: _____

2 Are there any additional functions you would like Tim to attend:

2 _____

2 _____

Other speakers presenting at this meeting:

Name: _____ Topic: _____

Name: _____ Topic: _____

2 Name: _____ Topic: _____

* Program Content *

2 What is the program/meeting theme: _____

2 What is the purpose of the meeting (training, annual meeting, convention, awards banquet):

2 What are the specific objectives for this meeting over all: _____

2 Previous professional speakers used for meetings:

2 Name: _____ Topic: _____

Name: _____ Topic: _____

Name: _____ Topic: _____

Name: _____ Topic: _____

2 Do you have any creative suggestions to help Tim make this a memorable meeting: _____

2 Most audiences want something to take home to continue the learning after the presentation.
What would you prefer for each attendee: (see available product list - page 14)

- 2
- One of Tim's books.
 - One of Tim's audio cassette albums.
 - A custom tailored workbook.
 - A video of the Tim's *live* presentation for your group.
 - Audio tapes of the Tim's *live* presentation for your group.
 - Personal Success Journal.
 - Personality style/work profile.
 - Other: _____

* Program Content *

2 How do you want to handle this?

- Purchase in quantity prior to the meeting to distribute to participants before or at the meeting.
- Offer learning materials for purchase at the meeting by Tim.
- Purchase the materials in quantity for distribution to the participants after the meeting.
- Let the participants order the materials from Tim after the presentation.

2 Will alcohol be served before or during the meeting? _____

2 Are there any sensitive topics Tim should avoid: _____

2 Will any organization business be conducted before Tim's presentation:

2 Meeting Objectives: _____

2 In general your attendees like speakers that: _____

2 In general your attendees don't like speakers that: _____

2 Key employees present: _____

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* Program Content *

2

What do you want the focus of Tim's presentation to be:

2

What specific areas (topics) would you like Tim to discuss during his presentation:

2

What would you like the participants to do, think, feel differently after Tim's program:

2

What behaviors, opinions or skills would you like the participants to change:

2

What is the one thing you would like all of the participants to take from Tim's program:

* **Program Content** Contd. *

2

What are some common perceptions your attendees have about:

Your customers: _____

Your competitors: _____

Your organization: _____

The market place: _____

The economy: _____

Any special requests you have of Tim to ensure your meeting objectives are met:

2

* Audience Profile *

2 Number of attendees: _____ % Female: _____ % Male: _____

2 Average education: _____

2 Average Age: _____ Age range: _____ Average income range: _____

2 How are people paid: Salary, commission, bonus, other: _____

2 Experience level: _____

2 Will spouses be attending: _____

2 Positions represented by the attendees: _____

2 _____

2 _____

2 Types of firms represented: _____

2 _____

2 Any Association, media or other attendees: _____

2 _____

2 Products or services you sell, manufacture, distribute: _____

2 _____

2 What are the correct titles of the attendees: _____

2 Major job responsibilities: _____

* Meeting Logistics *

2 How will the room be set up: (classroom, theater, conference etc.) _____

2 Is audio equipment available on site: _____ Video: _____

2 Is the lighting adequate: _____ Sound system: _____ Comfort level of room: _____

2 Is there any event in an adjoining room that may interrupt Tim's presentation? _____

2 How do you want to handle Tim's travel arrangements:

2 Air reservations: _____

Hotel: _____

Ground transportation: _____

Please Note

Please see Page 13 of this questionnaire for additional room set-up recommendations and/or requests.

2 Can Tim have access to the meeting room for set-up purposes prior to the start of the meeting?

2 Will someone be picking Tim up at the airport? _____

2 If so, Who: _____

Will someone be taking Tim to the airport at the conclusion of his presentation? _____

If so, who: _____

2 Any other logistics that Tim should be aware of: _____

2 _____

* **Background** *

What three things should Tim know about the group before addressing them?

2

1. _____
2. _____
3. _____

What do your people (audience) deal with most often (Customer profile): _____

2

What areas of their overall work responsibilities/performance could improve the most?

2

Of the paid professional speakers you have used in the past three years, what did they cover:

Speaker: _____

2

Speaker: _____

Speaker: _____

What did you and or your group like/dislike about his/her performance?

2

* **Background** Contd. *

2 **What are the most significant events that have occurred in your industry, organization or group during the past year? (merger, relocation, significant growth etc.):**

2 **What is the current state of your industry and organization.**

The industry:

Problems: _____

Challenges: _____

Breakthroughs: _____

Your organization and people:

Problems: _____

Challenges: _____

Breakthroughs: _____

2

* **Background** Contd. *

2

Please share any inside information you can think of relating to your organization or industry (personal or business)

Who are your major competitors: _____

2

How does your organization differ from your competitors: _____

2

Who are your primary customers: _____

2

What are your major strengths compared to your competitors in general: _____

2

What are your major weaknesses compared to your competitors in general: _____

2

What are the most common objections receive from your customers or prospective customers. _____

2

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* Background Contd. *

2 What are some of the unique features of your products/services and or your organization?

2 What are the two most important benefits you offer your customers: _____

Who are the corporate officers:

2 CEO: _____

President: _____

CFO: _____

VP Sales: _____

VP Marketing: _____

VP Operations: _____

National sales manager/director: _____

Additional Information:

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* **Please Send Us!!** *

2

- ✓ A meeting program or agenda.
- ✓ Company brochures.
- ✓ Copies of company advertisements, direct mail pieces.
- ✓ Copies of articles about the company, industry or key members of management.
- ✓ An annual report.
- ✓ Meeting announcements.
- ✓ An organizational chart.
- ✓ Policy manual
- ✓ Any relevant trade publications.
- ✓ Recent press releases.
- ✓ Sample publications.
- ✓ If the group is under 50, a list of the names of the participants.

People we can contact for additional information/research on your organization, group or industry:

Name: _____ Position: _____

Organization: _____ Tel No: _____

2

Name: _____ Position: _____

Organization: _____ Tel No: _____

Name: _____ Position: _____

Organization: _____ Tel No: _____

Do you have an in-house newsletter? YES NO

If Yes would you like an article by Tim for an upcoming issue? YES NO

2

What magazines or publications service your industry: _____

2

2

Will there be table-top exhibits or displays? YES NO

Would you be willing to provide display space for Tim's materials? YES NO

