



This packet is designed to help us prepare a program specifically suited to the needs of your group. Please take a moment to fully answer all of the questions and return the form to our office. Thank you.

Your Name/Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Presentation Date & Location: \_\_\_\_\_

### Special Request

Please send any available printed material on your organization, products/services, employees, etc. Also, please provide us a camera-ready, black & white copy of your logo if possible.

### Audience Profile

1. Audience:  
Number attending: \_\_\_\_\_ Are spouses invited? Y N  
Average of males: \_\_\_\_\_ Percentage of females: \_\_\_\_\_  
Average age group: \_\_\_\_\_ Range of age \_\_\_\_\_ to \_\_\_\_\_  
Annual income (range & average): \_\_\_\_\_  
Educational level: \_\_\_\_\_  
How are these people paid? (Salary? Bonus? Commission?) \_\_\_\_\_
  
2. What are the major job responsibilities of those in the audience?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
3. What are their correct titles? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
4. Will there be many people in the audience who do not fit the description above? Y N  
If so, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
5. What three main things do you think I should know about your group before addressing them?
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_



6. Who do these people (the audience) deal with most often? Please paint a word-picture of their typical “customer”. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
7. What areas of their overall working performance are ripest for improvements?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
8. What are the names and proper titles for the following individuals in your organization?  
President/CEO \_\_\_\_\_  
VP of Sales/Marketing \_\_\_\_\_  
Director of Training/Education \_\_\_\_\_  
Sales Manager \_\_\_\_\_  
Meeting Planner \_\_\_\_\_  
Customer Service Manager \_\_\_\_\_
  
9. If your group is smaller than 50 people, please send a list of their names and titles so that Mr. Hoffman can be aware of them in advance.

**Background**

1. What professional speakers have you used in the recent past and what did they cover?  
Speaker: \_\_\_\_\_ Topic: \_\_\_\_\_  
Speaker: \_\_\_\_\_ Topic: \_\_\_\_\_
  
2. What did you specifically like/dislike about their performance? Why? (Feel free to withhold names and only comment on their work.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
3. What are the most significant events that have occurred in your industry, organization, or group during the past year? (i.e., mergers, relocations, etc.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



4. What are some current problems/challenges/breakthroughs experienced by your industry/organization/people?

**The Industry:**

Problems: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Challenges: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Breakthroughs: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Your Organization  
And People**

Problems: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Challenges: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Breakthroughs: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Please share with us any inside information you can think of relating to your organization or industry (i.e., did a major firm go bankrupt? Is there tension between certain groups? Does your top performer race turtles on weekends? Etc.) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. What is the primary **product/service** that you offer? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



7. What are the two most important **benefits** you offer to your customers?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_

8. What are the unique features of this product/service that differentiates it from competitive product/services? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

9. What are the most common objections received from customers or prospective customers? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

10. Who are the major competitors in your market areas? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

11. What are your major weaknesses compared to your competitors? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

12. What are your major strengths compared to your competitors? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Congratulations!** You're finally done. The time you've spent answering these questions will make a positive difference in the quality of our program. Thank you!