

# Assessment Working Form

## (Pre-Program Questionnaire)

Thank you for taking the time to fill out this questionnaire. The information, which you provide, will help me to create a program that best suits the goals and objectives of your upcoming event.

Please respond to the questions that are applicable to your organization and event, and return this questionnaire by \_\_\_\_\_. This will give us sufficient time to review your needs, consult with you further, and customize my material for your program.

You can submit your questionnaire responses online by clicking the “submit” button at the bottom of this page, or print out this form and fax it to my office at **604-941-7708**

If you have any questions about this process, please contact me directly at **604-941-7708**.

### 1. Corporate/Association Information

Company/Association Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Email: \_\_\_\_\_

Telephone: \_\_\_\_\_

Alternate contact number: \_\_\_\_\_

Fax: \_\_\_\_\_

Website Address: \_\_\_\_\_

### 2. Event Details

Date of event: \_\_\_\_\_

Time of event: \_\_\_\_\_

Location of event: \_\_\_\_\_

Where is Joe's session positioned in the agenda? \_\_\_\_\_

\_\_\_\_\_

Joe's start time: \_\_\_\_\_ Joe's end time: \_\_\_\_\_

Who will be introducing Joe? \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

What happens before Joe speaks? \_\_\_\_\_

\_\_\_\_\_

What happens after Joe speaks? \_\_\_\_\_

\_\_\_\_\_

What is your budget for this event? \_\_\_\_\_

Is there a separate budget for educational products? \_\_\_\_\_

What other topics/content do you need to fill for this event? \_\_\_\_\_

\_\_\_\_\_

Do you have any other speaking needs for this event? \_\_\_\_\_

\_\_\_\_\_

Who have you hired to speak in the past 12 months? \_\_\_\_\_

\_\_\_\_\_

Beside yourself, who will be involved in making the final purchasing decision?

\_\_\_\_\_

### **3. Dynamics of the group**

Total number of participants expected: \_\_\_\_\_

Will spouses be attending? (y/n) \_\_\_\_\_

Percentage of male/female participants: \_\_\_\_\_

Age range of the group: \_\_\_\_\_

### **4. Event Focus**

What is the purpose of this meeting? (i.e.: annual meeting, sales, kickoff, awards banquet, etc.) \_\_\_\_\_

\_\_\_\_\_

Is there a specific theme/title for your meeting? What does it mean to your group?

\_\_\_\_\_

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**5. Organizational & Industry Details**

What are the three major challenges that you are facing as an organization/association?

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What are the three major victories that you are most proud of as an organization, association, or team? \_\_\_\_\_

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What are the most significant changes happening in your industry right now?

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What three challenges/fears/concerns do your members/people/team have right now?

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**6. Presentation / Workshop Goals**

What are your objectives for Joe's presentation? (i.e. What feedback would you like to receive from participants who attended Joe's presentation?) \_\_\_\_\_

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What would make the presentation really special for you and your attendees?

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What are the most important things Joe should know about the people attending the presentation? \_\_\_\_\_

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Do you have any other suggestions to help make this program even more successful and effective? \_\_\_\_\_

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Please forward any information you feel will assist Joe in understanding your organization/association better. (Examples: Mission/vision/values statement, annual report, company history, newsletters, brochures, outline of previous conferences, current program announcement, etc.)

**Privacy Policy:** Your answers to these questions will remain strictly confidential. The information collected will only be used to assist me in better understanding your organization and audience, and to customize my program for your particular objectives.

Thank you again for taking the time to complete this questionnaire. I will contact you shortly to review and clarify any final details.

I look forward to working with you at your upcoming event!

Joe Roberts  
604-941-7708  
[joe@skidrowceo.com](mailto:joe@skidrowceo.com)