

# PRE-PROGRAM QUESTIONNAIRE

## PAUL MONTELONGO

I am honored to be working with you! The privilege of the platform is an awesome responsibility which I take very seriously. My goal is to help you reach yours! The time you invest in filling out the following questionnaire will help me deliver a highly tailored, quality program and make you shine! Please return this questionnaire to me as soon as possible, along with the following items (and any other materials you feel would help):

- ✓ Your latest annual report or prospectus.
- ✓ Company brochures and literature
- ✓ Program announcement and invitations
- ✓ Organizational chart and list of attendees
- ✓ Newsletters or company bulletins (please send them until time of program)

Thank you in advance for your time and I look forward to making your event memorable.

### **I. Organizational Profile:**

Organization name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_ Web Address: \_\_\_\_\_

Name of Meeting Planner/Chairperson: \_\_\_\_\_

Best time and number(s) you can be reached: \_\_\_\_\_

President/CEO (or Executive Director): \_\_\_\_\_ Title: \_\_\_\_\_

SVP of Dept. responsible for event: \_\_\_\_\_ Title: \_\_\_\_\_

SVP of HR or Training & Development: \_\_\_\_\_ Title: \_\_\_\_\_

Please list associates Paul should talk to prior to engagement to get a more comprehensive view:

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone: \_\_\_\_\_

What is mission/philosophy statement of the organization? If you have it printed already, please feel free to send it along with the other materials. \_\_\_\_\_

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What is the organization's highest value? \_\_\_\_\_

What are the most recent changes in your industry and company? Please describe the effects. \_\_\_\_\_

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What are your primary products or services? Please send collateral information, if available. \_\_\_\_\_

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How are your products or services different from your competitors? \_\_\_\_\_

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Who are your top two competitors? \_\_\_\_\_

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What National Association does your company belong to? \_\_\_\_\_

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What are your organization's greatest strengths? \_\_\_\_\_

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What is the organization's greatest weakness? \_\_\_\_\_

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**II. Meeting Profile:**

Meeting Facility: \_\_\_\_\_

Full Address: \_\_\_\_\_

Phone: \_\_\_\_\_ On-site Contact Person: \_\_\_\_\_

Distance from airport in miles: \_\_\_\_\_

Meeting Type: Annual \_\_\_\_\_ Sales \_\_\_\_\_ Management \_\_\_\_\_ Awards \_\_\_\_\_

Other \_\_\_\_\_

Name and Theme of Event: \_\_\_\_\_

What does that mean to you?

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

What is your goal for bringing in Paul to your event (specific objectives)?:

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

Are there themes or common elements that you would like Paul to weave into his presentation?

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

What/Who immediately precedes Paul's presentation?

\_\_\_\_\_

What/Who immediately follows Paul's presentation?

\_\_\_\_\_

Exact date/time of Paul's presentation. Date \_\_\_/\_\_\_/\_\_\_ Time: \_\_\_\_\_ - \_\_\_\_\_

Are there other professional speakers/trainers at this event? \_\_\_\_\_ If so please list.

Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date/Time: \_\_\_\_\_

Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date/Time: \_\_\_\_\_

Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date/Time: \_\_\_\_\_

What speakers have you employed in the recent past?

Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date: \_\_\_\_\_  
Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date: \_\_\_\_\_  
Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date: \_\_\_\_\_  
Name: \_\_\_\_\_ Subject: \_\_\_\_\_ Date: \_\_\_\_\_

Comments (likes/dislikes) about past speaker's presentations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**III. Audience Profile:**

Expected number of participants: \_\_\_\_\_ Are spouses attending? \_\_\_\_\_

Average Age: \_\_\_\_\_ Male/Female ratio: \_\_\_\_\_ Education level: \_\_\_\_\_

What areas or departments will be represented? \_\_\_\_\_  
\_\_\_\_\_

How will most of the audience be dressed? \_\_\_\_\_

How will the executives be dressed? \_\_\_\_\_

Will there be any invited guests or VIPs present? \_\_\_\_\_

Any issues to avoid? \_\_\_\_\_

Anything else you feel Paul should know about the audience? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IV. "The Most Important Part of this Questionnaire"**

What is the MOST important thing to you with this meeting or conference? In other words, what is the single critical element of success for your meeting? Please take time to contemplate this question. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you know when that "Most Important" thing has happened? What procedures, comments, responses, changes or actions will happen for you to know that your meeting is a success? \_\_\_\_\_

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**V. At Your Service!**

Are you interested in an audio/video recording of the session? \_\_\_\_\_

Most audiences want something to help them continue learning after the presentation. We can arrange to have products available on site or you may pre-purchase products at a discount. Which do you prefer?

- \_\_\_\_\_ Purchase at quantity discount to distribute to participants at the event
- \_\_\_\_\_ Offer learning materials to participants for purchase at the event

Would you like Paul to autograph his books for your group after the program? \_\_\_\_\_

If this is a sales meeting, does your sales staff have a specific "sales systems" for your product or service? \_\_\_\_\_ If so, please include any material that would document it.

How do you plan to reinforce the program message after the conference? \_\_\_\_\_

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**BIG THANKS!!!**

**Your efforts are appreciated. We want to exceed your expectations and this information will greatly enhance our service to you and your organization. Thank you!**

