

# **What Leil Needs to Know To Help Make Your Meeting a Success**

Thank you for taking the time to supply this information. The more prepared we are, the better we can tailor and personalize the message.

To more accurately target your needs and goals for the event, please take a few moments with this questionnaire. Either you may fill it in, or we can schedule a telephone phone conference to go over the questions. If you prefer to write the answers, you may send, scan, or E-mail them to the address below.

## **SEMINAR TITLE:**

Date: \_\_\_\_\_

Start time: \_\_\_\_:\_\_\_\_ End time: \_\_\_\_:\_\_\_\_ Any breaks?

What are the perceived needs of the attendees, and what do they hope to learn from the program?

What is on the program (or in participants' day) just before Leil speaks?

What happens on the program (or in their day) just after she speaks?

## **Conference theme:**

Specific purpose of this meeting (awards banquet, annual meeting, etc.)

Do you have three key points you want stressed?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

What is the sense of urgency about improving matters?

## **TELL US ABOUT YOUR ORGANIZATION:**

What are the most important changes happening in your company or association and industry?

What is your competitive position within the industry?

Who are your biggest competitors?

What are your mission statement and/or vision for the future?

What special problems or challenges are you facing as an organization?

What keeps senior management awake at night? Do they have special concerns?

What opportunities are waiting to be exploited?

Any new markets or new products/services on the horizon?

Anything humorous Leil should know about? Industry/association insider jokes?

Any industry jargon Leil should be aware of? (We'll chat further on this one.)

Significant Events? (mergers, historical events, awards, recent publicity, etc.)

## **ABOUT THE PARTICIPANTS:**

What are the challenges of your audience members?

Their concerns? Their fears?

Do you think there is a difference in the concerns of management and of the participants? If so, what?

Make up of audience (members, employees, suppliers, spouses, etc.)

Should the message be targeted more to one group than another? Which?

Number attending: \_\_\_\_\_

Gender: % male \_\_\_\_\_ % female \_\_\_\_\_

Age span:

Average age:

Average annual income: \_\_\_\_\_

Perks, incentive trips?

**Major job responsibilities of participants:**

What is the life of the audience on a day-to-day basis? (In the office, field, long hours?)

What are the frustrations THEY have in their lives, company, or industry?

What are the sensitive issues? Any controversial issues? Topics/subjects to avoid?

Please name two people in your group who will be in Leil's seminar and their role in the group (worker, supervisor, V.I.P., etc.) With your permission, I would like to contact them for more research information on your group.

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

Phone #: \_\_\_\_\_

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

Phone #: \_\_\_\_\_

**FOR THE MEETING PLANNER:**

What are YOUR major hopes for this meeting? What would you most like to accomplish by Leil's speaking for your group? (In other words, what would cause you to say, "Wow, that's just what I wanted!")

If you had to choose a balance, please mark percentages you would you like her talk to be entertaining vs. high content information (communications techniques & strategies)

Entertaining \_\_\_\_\_%

High content information \_\_\_\_\_%

Any secondary goals for her talk?

Can you think of anything -- let your imagination soar -- that would make Leil's seminar special for your group?

What seminars have you used in the past that covered topics related to the material Leil will be presenting for you?

What did you like and/or dislike? Without their names, please comment on the material and their presentation.

Any other thoughts, comments, questions, ANYTHING you'd like to add?

***Thank-You for taking the time with this Questionnaire!***

**Addendum to Leil's Pre-program Questionnaire for Sales**

On the average, what percentage of your new business comes from:

Referrals: \_\_\_\_\_% Cold Calls: \_\_\_\_\_% Repeat Business: \_\_\_\_\_% Other: \_\_\_\_\_%

What is customer's first experience with your company? They answered an ad? \_\_\_\_\_

Received a direct mail piece? \_\_\_\_\_ Received a cold call? \_\_\_\_\_

Received a call from a lead? \_\_\_\_\_ Other \_\_\_\_\_

What are several of the most common objections your sales staff hears in order of prevalence?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

What percentage of their average day is spent making cold calls:

Making sales calls on phone:

Making sales calls in person:

What venue do these calls take place in? (Customer's office seated, in busy work environment, etc.)

Follow up, service on phone?

In person?

Other:

What is the average ticket on your product?

The average sales cycle? (Including number of personal and/or phone calls.)

Do you have products to upsell?

What sales materials do you mail out? (I'd like copies of these.)

How important is personal networking to your sales staff to obtain new customers?

Does your sales staff have a suggested opening phrase on cold calls? What?

What type of training have they had before, and how much?

Are most of your customers in the same profession(s)? Which?

What outside interests do most of your customers have?

Any special sales terminology you use in your in-house sales training?