



Client Questionnaire

Name of Client: _____

Event: _____

Program Date: _____

Client Contact Information

Name: _____ Title: _____

Address: _____

Phone: _____ Fax: _____

Email Address: _____

Website URL: _____

Logistics

Meeting Location: _____

Address: _____

Phone: _____ Fax: _____

Meeting Room: _____

Name and location of Steve's hotel: _____

Address: _____

Phone: _____ Fax: _____

Confirmation number: _____

Will someone meet Steve at the airport? Yes No

- Who: _____

- Where: _____

If no one will be meeting Steve at the airport, please provide the best way to get to the hotel:

Taxi Rental Other : _____

The Meeting

Meeting start time: _____ End time: _____

Steve's program start time: _____ Steve's end time: _____

Meeting attire:

Business Casual ___ Business ___ Semi-formal ___ Formal ___ Other: _____

What happens before and after Steve's presentation: _____

Who will introduce Steve? Name: _____ Title: _____

Meeting Theme: _____

Specific purpose of the meeting: _____

List the top 3 objectives for Steve's presentation:

- _____
- _____
- _____

Sensitive issues to avoid: _____

Are there any messages that you would like Steve to reinforce: _____

Audience:

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

Age Range: _____ to _____ Are Spouses invited? Yes _____ No _____

Titles of Attendees: _____

Your Organization:

What is your organization most proud of: _____

What is your company's mission statement:

Do you have any key phrases or buzz words you often use?

Specifically, what "local color" could Steve use in his presentation? This could be anything: new policy, an in-house buzz word, a familiar tradition, local weather, or achievement of a top official in your organization

Who are your major competitors by name and product category?

Biggest opportunities present and/or future?

Biggest challenges your organization is facing?

What training programs have the audience members been through?

What is unique about your group?

What is on the minds of the participants? What makes them lay awake at night?

Let's assume the event is over. As you look back, what needs to happen for you to feel that it was successful and a good investment was made bringing Steve in to speak?

Depending on the success of this presentation, what other presentation topics would be considered for the future?

Specific Objectives for Steve's Presentation:

What could Steve do to add a special touch to the program? How could he go "the extra mile" for this audience? _____

Please list past speakers and their topics for this event. What did the group like about each? What did the group dislike about each?

May Steve offer his products for sale following his program?
