

## Bill Cole's Pre-Program Questionnaire

I am looking forward to meeting you and the other attendees at the program. To help me customize your program please copy this questionnaire into your text editor and complete as much of this questionnaire as you think would be relevant. I really appreciate your help!

Please send us any printed information on your group that may help us such as:

- corporate report
- association magazine/newsletter
- key product brochures
- news releases on Bill's presentation
- informative articles
- past convention programs
- this presentation's program/brochure
- service recognition programs
- organization chart
- service standards
- staff/company newsletter
- mission/vision/values
- training programs - table of contents
- sample sales tracking reports
- special promotions/campaigns
- meeting agenda/invitation
- service measurement tools
- sample completed performance appraisal
- strategic plan/objectives
- business/marketing plan
- job descriptions
- customer/member newsletter

Return this questionnaire via email to [Bill@MentalGameCoach.com](mailto:Bill@MentalGameCoach.com) or mail it to:  
Bill Cole, William B. Cole Consultants, 19925 Stevens Creek Blvd., Cupertino, CA 95014-2358.

Alternatively, I would be happy to phone you for a brief chat to fill the form out together.

If you have any questions, call 408-725-7191, or fax 408.298.9525.

Presentation title \_\_\_\_\_

Date \_\_\_\_\_ Start time \_\_\_\_\_

End time \_\_\_\_\_ Breaks? \_\_\_\_\_

What is on the program just before Bill speaks? \_\_\_\_\_

Will Bill be able to have some staging set-up time right before he speaks? \_\_\_\_\_

If Bill goes on right after another speaker, or with no staging set-up time due to program restrictions, when can he arrive to set up his staging area? \_\_\_\_\_

What happens on the program right after he speaks? \_\_\_\_\_

When does your meeting begin? (date and time) \_\_\_\_\_

When does it end? (date and time) \_\_\_\_\_

Audience dress code for the meeting: \_\_\_\_\_

Do you want Bill to write an article for your newsletter or other publications prior to his program?  
\_\_\_\_\_

Your desired program mix:

\_\_\_\_\_% Motivation

\_\_\_\_\_% How To/Nuts & Bolts

Conference/meeting theme \_\_\_\_\_

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

What is the theme of this specific meeting? \_\_\_\_\_

What are you hoping to accomplish with this meeting? \_\_\_\_\_

Why do you think I'll be an asset to this meeting? \_\_\_\_\_

What are you hoping to accomplish with my particular program? \_\_\_\_\_

How will you know if my program is successful? Give me a target.  
\_\_\_\_\_

Are there any particular topics or ideas that I should address during my program?  
\_\_\_\_\_

Are there any sensitive issues that should be avoided? \_\_\_\_\_

What is the audience's overall opinion regarding the subject of my presentation? (favorable, hostile, neutral?) \_\_\_\_\_

Please list some industry-specific terms, phrases, jargon or acronyms that I might incorporate into my program.  
\_\_\_\_\_

Please list any humorous buzz-words, pet peeves or inside jokes in your industry or organization I might use for humorous material. \_\_\_\_\_

Please share any "local color" (humorous goings-on) you may be aware of relating to the location where my program will be held. \_\_\_\_\_

Introducer's name and title: \_\_\_\_\_

Work Phone \_\_\_\_\_ Meeting-site phone \_\_\_\_\_

E-mail \_\_\_\_\_

Would this person, or another person, be able to assist Bill just before his program ends in collecting program evaluations in return for a raffling of a valuable prize? \_\_\_\_\_

Is there any publicity work Bill can do for you while he is at your event? Radio or television? Please let us know ahead of time, so we can arrange travel. \_\_\_\_\_

Who are the other speakers on the program?

Speaker \_\_\_\_\_

Topic \_\_\_\_\_

Speaker \_\_\_\_\_

Topic \_\_\_\_\_

Speaker \_\_\_\_\_

Topic \_\_\_\_\_

What speakers have you used in the past who covered topics related to the material Bill will be presenting to you?

\_\_\_\_\_

What professional speakers have you used in the past and what did they speak on?

\_\_\_\_\_

What did you like and/or dislike? Without their names if you would like, but do comment on the material they used.

\_\_\_\_\_

Name three main movers and shakers of your group that will be in Bill's audience. With your permission we would like to contact them for more information on your group.

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

What would make Bill's presentation really "special" for your group?

\_\_\_\_\_

\_\_\_\_\_

## THE AUDIENCE DEMOGRAPHICS

Number attending:

\_\_\_\_\_% Female

\_\_\_\_\_% Male

\_\_\_\_\_% of Guests

Spouses attending? \_\_\_\_\_

Average age of attendees: \_\_\_\_\_

Annual average income: \_\_\_\_\_

Income range: \_\_\_\_\_

Educational background:

\_\_\_\_\_% Ph.D./Masters

\_\_\_\_\_% College Grad

\_\_\_\_\_ % HS. Grad

Major job responsibilities of audience:

- \_\_\_\_\_ % Senior executives:
- \_\_\_\_\_ % Board of directors
- \_\_\_\_\_ % Admin./clerical
- \_\_\_\_\_ % Mid-management
- \_\_\_\_\_ % Officers/sales reps
- \_\_\_\_\_ % Entrepreneurs

Ethnic diversity:

- \_\_\_\_\_ % Caucasian
- \_\_\_\_\_ % Hispanic
- \_\_\_\_\_ % Asian
- \_\_\_\_\_ % Black
- \_\_\_\_\_ % Other

Positions/Job Titles \_\_\_\_\_

### **DETAILS ABOUT YOUR AUDIENCE**

Is their attendance at your meeting mandatory? \_\_\_\_\_

Is their attendance at my program mandatory? \_\_\_\_\_

Please describe what the audience will be doing in the hour preceding my program.

\_\_\_\_\_

What will they be doing after my program? \_\_\_\_\_

What should I know about the people in your group before I start my program? Are there any problems, competition, resentment or peer pressure that I should be aware of?

\_\_\_\_\_

Their challenges: \_\_\_\_\_

Their breakthroughs: \_\_\_\_\_

What are the most significant things on their minds as they come to this meeting?

\_\_\_\_\_

Are there any hearing or sight-impaired individuals who will attend my program? \_\_\_\_\_

What separates your high performance people from others?

\_\_\_\_\_

### **TELL US ABOUT YOUR INDUSTRY**

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

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

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

## TELL US ABOUT YOUR ORGANIZATION

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

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

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

What are the greatest accomplishments of this group? \_\_\_\_\_

What are the current projects of this group?  
\_\_\_\_\_

Significant events? \_\_\_\_\_

Mergers? \_\_\_\_\_

Relocations? \_\_\_\_\_

Will Bill's presentation be audiotaped and/or videotaped? \_\_\_\_\_

## EDUCATIONAL MATERIALS

If you wish, Bill will make his educational materials available to your audience, so that they may continue the learning process at home. There are two ways this can be arranged. Please check the one that is most appropriate for your group.

- A.  Group purchase in advance for each attendee, at wholesale.  
 Deliver before the program  
 Deliver at the end of the program
- B.  Materials made available at the back of the room after the presentation.

If you checked "B", please make sure that:

1. Nothing will be on the program directly after Bill's presentation and that there will be a break for at least 20 minutes.
2. A table will be made available for Bill to place his materials by the exit door.
3. Someone from your group will assist with sales.

We can provide free articles for your web site, e-zine or hard-copy newsletter. What topics would you like?

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(For an overview, see our web site, [MentalGameCoach.com](http://MentalGameCoach.com)).

What deadlines do you have for inclusion of these articles?

On the web site: \_\_\_\_\_

For your e-zine: \_\_\_\_\_

For your hard-copy publications: \_\_\_\_\_

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**TRAVEL INFORMATION**

Location of presentation and venue name \_\_\_\_\_

What time can we get into the room to set up? \_\_\_\_\_

Who would the contact person be to allow us entry?

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

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

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

Location at the site itself: \_\_\_\_\_

Airport to arrive at: \_\_\_\_\_

How will Bill be transported from the airport to your site?

Taxi

Rental car

Pick-up person?

Pick-up person's name: \_\_\_\_\_ Phone \_\_\_\_\_

If an emergency occurs on the way to the site, who would be an alternate contact if you are unavailable?

Name and title \_\_\_\_\_

Business phone \_\_\_\_\_ Home phone \_\_\_\_\_

On-site phone \_\_\_\_\_ Pager \_\_\_\_\_

What is your organization's WEB SITE address?

What is YOUR e-mail address? \_\_\_\_\_

Your name and title \_\_\_\_\_

Your direct phone \_\_\_\_\_

Thank you very much for your help in making our presentation a success!! We are looking forward to working with you closely to make sure everyone has a good time and leaves the program with valuable information.

Bill Cole, MS MA

CEO

William B. Cole Consultants

Form updated February 21, 2010