

Bill's Program Tailoring Form

Thanks for your help! This form will help Bill prepare the best program possible for your group. **Please return to us at least three weeks before the presentation.** Feel free to add pages if necessary, skip parts that don't apply to you, and pass the questionnaire on to others as well. The more info the merrier! And remember: the more detailed your answers, the better Bill can customize his program specifically for your group!

The Presentation

Name of Group: _____

Date of Presentation: _____

Name of Event: _____

Person completing this form: _____ Phone: _____

E-mail: _____ Website of Group: _____

Meeting Time: Begin _____ End _____

Bill's Program: Begin _____ End _____

2nd Program: Begin _____ End _____

What is the theme for your event, if any? _____

What is the Twitter hashtag for this event (if any)? _____

What is the Facebook Page for this event (if any)? _____

What are some of the problems / breakthroughs / challenges currently experienced by your organization or industry? _____

What's REALLY keeping your attendees up at night? _____

What changes do you anticipate in your organization / industry in the near future? _____

If there were a "common enemy" for your group (e.g., competitor, gov. agency, industry, etc.), who would it be, and why? In other words, who do you "love to hate" (and why)? _____

If there is a special program or project your group or organization is currently working on, please briefly describe its name, nature, and any accompanying slogans:

What is the biggest misconception people (or your customers/clients) have about your industry, or the people in your industry?

Please list three “pet peeves” that this audience would relate to. Or, to put it another way, if several members of this audience were having drinks together, what would they start griping about after the 3rd beer? How would they complete the sentence, “It just drives me crazy when...”? **Please give specific examples**, if possible (e.g., “When customers call in just before closing to demand early delivery” instead of just “Customers.”)

Please list any specific language, jargon, phrases, or words associated with your group that might be incorporated into this presentation:

Is there any “local color” (e.g., new company policy, broken piece of equipment, local hang-out, etc.) that Bill could incorporate into his presentation?

Is there anything Bill should NOT mention, or sensitive areas he should avoid?

What is your OVERALL objective of this meeting or conference?

What are your SPECIFIC objectives for Bill’s talk?

Are there any “seeds” you would like Bill to plant?

When your audience is walking out of the room following Bill's presentation, what do you want them thinking?

Will there be other speakers at this event? _____ Topics: _____

Bill's Introducer (name and title): _____

The Audience

Approximate number attending the meeting: _____ Male/Female ratio: _____% Male _____% Female

Age range of audience: _____ Average Age: _____ Will spouses be attending? _____

The dress code for attendees is:

- Casual
- Business casual
- Business
- Formal (black tie)
- Other:

General job responsibilities of attendees:

How can Bill refer to the *entire* group by job title or function (e.g., Health Care Professionals/Financial Advisors/Small Business Owners/Librarians)?

Please list two people who will be in the audience, and who most of the other attendees would know and like:

Name: _____ Title: _____

Name: _____ Title: _____

Travel & Logistics

Closest Airport: _____ Distance from site (in miles): _____

Ground Transportation (circle one): Taxi Rent a car Will be met by limo Will be met by other

If Bill will be met at the airport, where will driver meet Bill? _____

Hotel Name: _____ Hotel Address: _____

City: _____ State: _____ Phone: _____

Hotel Phone: _____ Bill's Hotel Confirmation #: _____

Meeting Location (if not hotel): _____ Address: _____

City: _____ State: _____ Phone: _____

Name of room where Bill will speak: _____

What will be happening immediately before Bill's talk: _____

What will be happening immediately after Bill's talk: _____

When will the room be empty for A/V setup and sound check? _____

Group contact on-site: _____ Cell phone: _____

A/V contact on-site: _____ Phone: _____

Is it possible for one or two guests to sit in on Bill's program? _____

Would you be interesting in pre-purchasing any of Bill's books or other educational materials as ATTENDEE GIFTS at a quantity discount? (Call for price quote.) _____

May Bill offer his books/tapes for sale following his program? (Bill will never "hard sell") _____

Thank you for taking the time to provide this information.