

PRE-EVENT QUESTIONNAIRE

A few focused questions to help customize your event. Feel free to adapt any question, or leave anything blank that we've already covered on a call.

This is a fillable PDF — for best results, open and complete it in Adobe Acrobat Reader or Preview, then save before returning it.

1 THE ASK

KEY TAKEAWAYS

What are the three most important things you want attendees to take away from this session?

DESIRED OUTCOME

What do you want attendees to do differently on their next sales call or customer conversation as a result of this presentation?

Ideal content mix for the presentation:

- Educational / Informational: %
- Motivational / Inspirational: %
- Entertaining / Humorous: %

2 THE ROOM

AUDIENCE COMPOSITION

Who will be in the room? (% leadership vs. individual contributors, sales vs. non-sales roles, tenure/experience mix)

SALES ENVIRONMENT

If sales related, are sales calls and meetings primarily virtual, in-person, or hybrid? Where does video fit into your team's sales process?

TEAM LANGUAGE

Any jargon, acronyms, or inside jokes specific to your industry or team I should know?

3 CONNECTION DIAGNOSTIC

CURRENT STRUGGLE

Where does your team currently struggle most in the 1st 5 Minutes of a conversation: opening small talk, names, asking real questions, or truly listening?

BOOMERASKING PATTERN

Do you see a "boomerasking" pattern on your team — reps who ask a question, listen briefly, then pivot back to talk about themselves?

RAPPORT-BUILDING PROCESS

Is there a current process for how your team builds rapport before pitching or interacting with a customer?

4 FRICTION & FRUSTRATIONS

COMMON OBJECTIONS

What are your team's most common objections?

RELATABLE PET PEEVE

Is there a recurring "day in the life" pet peeve or frustration I could use for a relatable moment on stage?

Optional — skip if nothing comes to mind.

5 SPOTLIGHT MOMENT (OPTIONAL)

TEAM RECOGNITION

Is there someone on your team who exemplifies great connection that you'd like recognized from stage?

6 LOGISTICS

Please provide 1-2 contacts I can reach out to for a quick pre-call:

Contact 1

NAME

PHONE

EMAIL

ROLE

Contact 2

NAME

PHONE

EMAIL

ROLE

SENSITIVE TOPICS

Are there any sensitive topics I should avoid?

ADDITIONAL NOTES

Any questions that I've not asked that you want me to know that would help me prepare to maximize this presentation?

Thanks for taking the time to complete this — it makes all the difference in customizing your program.

Please return at least 2-3 weeks prior to your event. Questions? Reach out anytime.