



## “Jimmy Z’s” Pre-Program Customization Worksheet

Jimmy Z is committed to being as well prepared as possible to assist you in getting your outcomes for his session and your conference. Please provide all the information you can about your company, the attendees and goals of your conference and his session.

Items that may prove useful include:

- ◆ Conference promotional material
- ◆ Attendee packets or kits
- ◆ Annual reports
- ◆ Newsletters
- ◆ Advertising, product literature & other promotional materials
- ◆ Trade publications
- ◆ Current articles about your industry
- ◆ New employee orientation kit
- ◆ Newspaper or magazine articles about your organization or industry

Jim is committed to being a “Student” of your industry, so please include more information rather than less to assist him in preparing to do a great job at your event!

This questionnaire will prompt you for ideas and information that he can use as well. Just skip any questions that are not as relevant, and please add any comments that you would like. Also include key contacts and titles of people you may wish him to speak with prior to the event.

The purpose of this questionnaire is not to create additional work for you, but to significantly increase the value of the program for your people. Please return this information at your earliest convenience directly to Jim Zawiski in any form to:

TurboCoaching.com  
Attn: “Jimmy Z”  
16W254 94<sup>th</sup> Street  
Burr Ridge, IL 60527  
(630) 455-6545  
(630) 214-4742 fax  
[Maureen@TurboCoaching.com](mailto:Maureen@TurboCoaching.com) email

Thank You!

Maureen Zabloudil, Office Manager

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## I. The Program

1. Is there a **meeting theme**/major topic, and if so, what is it?
2. What is the specific **purpose** of this meeting?
3. What are your 3 most important **objectives** for Jimmy Z’s presentation?
4. Are there any **sensitive issues**, which should be avoided?
5. If there are **other speakers** on the program with Jim, please identify them by name and title and the topics they will address, or please include a program guide:
6. What is Jimmy Z’s role in the conference (opening or closing, keynote or breakout session, etc.), and whom, if anyone, is on the program directly before and after Jimmy Z?

## II. The Attendees

### 7. **Audience analysis** (Please approximate in either #'s or %)

# attending \_\_\_\_\_ # of males \_\_\_\_\_ # of females \_\_\_\_\_ spouses? y/n

% who manage or supervise \_\_\_\_\_ average age \_\_\_\_\_ education \_\_\_\_\_

Age range: from \_\_\_\_\_ to \_\_\_\_\_

Income range from \_\_\_\_\_ - \_\_\_\_\_ What percent are salary vs. commission?

What are the major **job responsibilities** of those in the audience?

**Other pertinent information** about the audience Jim should know?

8. What are your **primary products and/or services**?

If a Sales Team, what are the two most important benefits you offer to your customers?

What are the most common objections received from your customers or prospective customers?

9. Who are your **customers** by type? (name major customers if appropriate)

10. Who are your biggest **competitors**?

11. What are the biggest **challenges** your organization is currently facing?

12. What are your biggest **opportunities**, present and/or future?

13. What are the 2 or 3 things your organization is **most proud of**?

14. Please provide a statement on the **state of your industry**. ( 2-3 sentences )

15. Jim and his research assistant like to talk with 2-3 attendees before his presentation. **Who would you suggest they contact?** Include name, position, phone, fax *and* e-mail if possible.

### III. The Logistics

16. What is the venue name and contact information? Name of Meeting Room? Hotel Confirmation #?
  
17. What Airport should Jim Fly into? Whom should Jim's Travel Agent call for a credit card to book the flight? Is there a Map from the airport or transportation plan? Who is the contact person for Travel arrangements and their contact information?
  
18. How far (**travel time**) is it from Jim's speech to/from the airport?
  
19. What are the exact **start and ending times** for Jimmy Z's presentation?
  
20. Who is Jimmy Z's **primary contact** at the event? Phone #, cell phone #'s and e-mail?
  
21. Who is his **introducer** and their Phone #'s, fax or e-mail to provide a sample introduction?
  
22. What is the appropriate **attire** for his presentation?
  
23. What **presentation title** would you like?
  
24. What takes place immediately **before** and **after** his presentation?
  
25. What **speakers** did you use **last year**?
  
26. Clients are often interested in providing a learning resource or gift to attendees such as a book, audio or videotape to extend the value and impact of Jimmy Z's presentation. Would you be interested in discussing this option? \_\_\_\_\_ Yes \_\_\_\_\_ No

Please provide any additional information you feel is important as well, *Thank You!*