

Program Customization Information

Please review the following questions and make notes of information you feel would be valuable for me to know. We'll be going over this information on the phone so I can have more in-depth knowledge of your group's specific needs and issues. This way I can integrate critical issues to your people.

The Audience

Please describe the target audience:

What motivates them?

What is special about this audience?

What's the selection process of the audience members? Is it mandatory that they attend?

Did they have a choice of topic?

Will there be different departments mixed together? What are any interdepartmental issues I should know?

What are the various levels of responsibility of audience members (executives, managers, salespeople, supervisors, staff)?

What are the top three challenges faced by the audience members?

What areas of their overall working performance are ripest for improvement?

What are the expectations of the audience?

What are some barriers to the topic?

Are there awards or distinctions to which the audience members could aspire? Please explain.

Any language, cultural or literacy barriers? What percent are non-native English speakers?

What is the climate of the audience—serious, playful?

What are the names of individuals who fulfill specific roles (class clown/wit, "mother,")? Any role model/hero/heroine for this group? Who?

Are these seasoned people or neophytes of training?

Morgan Seminar Group

1440 Newport Avenue ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ 800/247-9662
Fax: 408/998-1742 ▲ Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

The Client

Company

Give me a brief history of the company/organization.

What's the purpose of your company? What do you sell?

Who are your customers?

Who are your primary competitors?

What are your organization's goals and objectives?

What's the mission of this organization/department?

What's helping you get there?

What's keeping you from getting there?

What makes you unique in your industry?

What is your company's/organization's major strength?

What are your competitors doing that you admire?

What would your clients say about your company/organization?

What would your competitors say?

Describe the culture of the company:

Where do you perceive the company will be five years down the road?

What challenges are facing your organization in the next year?

What amount of change do you expect to take place in your organization in the coming year: extreme? moderate? light? none? Please describe.

How does one succeed (get ahead) in this organization?

What are major accomplishments of your organization in the past 12-18 months?

Any major internal conflicts?

Morgan Seminar Group

1440 Newport Avenue ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ 800/247-9662
Fax: 408/998-1742 ▲ Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

What are any sensitive areas—anything I should avoid?

What are your people doing right?

What are some examples of common languages, acronyms, jargon, product terms with definitions?

Inside information? Promotional/product names?

What are any funny things used as common “in house” jokes?

Industry

Give me an overview of your industry’s status—locally, regionally, nationally.

What are major trends in your industry right now?

What are the most significant events to have occurred in your industry/organization/group during the past year (e.g., mergers, relocations)?

Please share with me any “industry color” (e.g., did a major firm just go bankrupt?).

What are hot books in your industry?

The Program

What’s the purpose of this program?

Why did you choose this topic?

Why now?

What is the theme of this meeting?

What is the outcome you’re looking for? What do you want people to walk away with? What impact do you want this program to have six months down the line?

If you were giving this program, what three things would you want to make sure got covered?

Do you want more technique or motivation (substance vs. style)? What’s the ratio?

Are there key words/slogans/ideas you want me to emphasize? If so, what are they?

What are any potential barriers to the success of this program?

Morgan Seminar Group

1440 Newport Avenue ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ 800/247-9662
Fax: 408/998-1742 ▲ Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

Any company/industry stories that would be relevant to this program?

Who else is speaking at this event? What is their topic?

Who spoke last year/before and what topic?

When was the last time you had a program of this type, who presented it and how did it go?

What have speakers you've had in the past done that was good/worked?

What have speakers you've had in the past done that was bad/didn't work?

What type of program has one over well in the past and why?

Why did you pick me?

What are some humorous examples/events?

Other

Please provide the names, titles and phone numbers of three industry/company leaders. I may call them to gather additional insight into your audience.

Name	Title	Phone #
------	-------	---------

How is this being promoted to the group?

Is anyone who is not directly involved with this group's responsibilities invited to this meeting.

What else should I know before addressing your group?

Audience members usually like taking home resources for continued learning (books, audio cassettes). How would you prefer to handle this learning opportunity?

_____ Group purchase of materials to deliver at end of my presentation

_____ Individual purchase of materials at the end of my presentation

_____ Other

Thanks for your time and help in making this an outstanding program!

Morgan Seminar Group

1440 Newport Avenue ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ 800/247-9662

Fax: 408/998-1742 ▲ Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com