



Pre-Program Questionnaire – Customization & Props

Please respond as best you can to any questions you feel need to be addressed.

If any questions were discussed during a prior call, feel free to leave the question blank.

Tell me more please...

Three most important things you want attendees to take away from this presentation:

- 1.
- 2.
- 3.

What do you want attendees to **do** differently as a result of this program?

What percentage of the presentation do you desire to be...

- Educational/Informational: ____%
- Motivation/Inspiration: ____%
- Humorous/Entertaining: ____%

Are there any key words, ideas or themes you want emphasized? If so, what are they?

Who will be in attendance? If possible, please share % of gender, age, title/role

What % of attendees are in leadership roles? Direct sales roles?

What % work remotely, onsite or hybrid?

In a “typical” sales call, is the salesperson primarily using video/virtual meetings to connect, in-person meetings or a combination of both? If both, which steps in the sales process use which type of connection?

Any jargon or catch-phrases for this group I should know?

Is there a running inside joke within this industry or group?

Please provide a couple of individuals who will be in attendance to connect with for customization and insight.

Ideally, these individuals represent a variety of individuals in attendance.

(name, telephone, email, position)

- 1.
- 2.

A Human Highlighter™ is someone who brings out the best in themselves and shines the light on others. They go above and beyond. Is there someone you would like to feature as a HH?

Current challenges facing attendees:

What are the controllable and uncontrollable challenges facing you in the next year?

Are there any “sensitive issues” that should be avoided? If so please explain.

Sales Specific questions:

What do your salespeople currently do to differentiate themselves from competitors?

What do you believe gets in the way of your team growing their customer base?

What would they say gets in the way of growing their customer base?

What are your salespeople's most common objections?

What language is your sales team currently using to overcome those objections?

Where do you believe your team falls short in their selling skills?

Current frustrations/stress facing attendees:

Is there another group, department, company, association, etc. they can't stand? (*Again, this is to create appropriate humor*) Please name and explain.

Name any specific CHALLENGES they face. Is there an internal process that drives them all nuts, a software rollout that didn't roll, meeting quotas? (*I realize attendees are varied, but given the industry is there anything they ALL must deal with that is frustrating? In other words, what little things do attendees complain, moan, groan, or gripe about? Again, the more specific the better.*)

Please list a few job situations or duties that can cause stress to attendees as they do their work:

- 1.
- 2.
- 3.

What are some of the things that the public – customers - coworkers - say or do that may irritate or cause stress at work:

- 1.
- 2.
- 3.

Signature Prop Skit: *In order to customize the prop piece to show all the roles an attendee performs in a day, please list in detail a typical day in the life from start to finish. This piece is all about humor, so any "frustrations" "pet peeves" or "annoying client examples" that everyone could relate to are what I'm looking to receive. For example, is there an internal process that drives them all nuts, a software rollout that didn't roll, meeting quotas? (In other words, what little things do attendees complain, moan, groan, or gripe about? Again, the more specific the better.) I take these situations and tasks to create a "funny" around it.*

For example, when speaking to nurses, a frustration is patients obsessively hitting the call light, so knowing that I was able to say, "And then there's those patients who hit the call light so often it looks like a disco!"

When speaking at Wells Fargo created this based on a truth that frustrates advisors: Isn't it funny that you are licensed, bonded, fingerprinted, drug tested and have a background check BUT you still need to have authorization to move your OWN money!

A few questions to stimulate thinking:

1. What type of email or phone call causes you to pull out your hair or roll your eyes?
2. It's usually difficult to get information in a timely fashion from _____.

3. Is there a particular form or software entry that is painful to complete?
4. Your day is rolling along beautifully and then _____ happens. This means you need to stop everything and _____.

Please list out a typical day from the moment attendees show up at work until day's end.

Thanks again for taking the time to complete this form. Please be certain to return within one month prior to conference to allow Colette time to get creative and customize the material!

Any questions please call or email Colette: 760-994-9816 or colette@colettecarlson.com