



*“Engage the workplace environment
to change the experience
and improve the outcome.”*

In order for Pat to be fully prepared for your program, please take some time to answer the following questions. The more details you give, the better Pat will be able to meet your needs by customizing this program so it is the right fit for your organization. Once you have completed filling out the information requested you can email it to us at info@engagetolead.com or fax it to: 561-745-3871.

1. Name and address of organization and contact information:

2. Time and date of presentation:

3. Composition of audience:

4. Number expected to attend:

5. Length of presentation:

6. What is the theme of your meeting or a slogan you currently have or are unveiling?

7. What is your organization’s mission statement?

8. What is your organization's major strength? What makes your organization unique? If applicable, what is your organization’s competitive edge?

9. What are some of the current problems or challenges experienced by your industry/organization/people?

10. What are your objectives for this meeting? In other words, what three things would you like the audience to walk away with?

11. What are the current concerns/problems/challenges facing your organization?

12. What sensitive areas/issues/topics or words should be avoided?



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13. What are the unique features of your organization/industry?

14. What will be taking place immediately before/after our program?

15. Who has presented programs for your organization in the past, and what did the programs cover?

16. Who can be contacted in case of an emergency or problem immediately prior to the event?

17. What other key people will be in the audience?

18. What else should I know about your organization that would make this program more meaningful? For example, please list some in-house or market-specific jargon, phrases, acronyms or other words that might be appropriate for incorporation.

19. If possible, please furnish me with the logo, nameplate, or program theme in a format suitable for reproduction on a handout.

Thank you for providing us as much information as possible so Pat's program can be a perfect fit with your needs. Your contact information will not be shared, sold or abused in any way and it will be kept private!

Call: (561) 408-2708

Email: pat@engagetolead.com

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