

**TO HELP MAKE YOUR MEETING A SUCCESS  
WHAT RODNEY NEEDS TO KNOW  
(In Writing)**

Thank you for taking the time to supply this information. The more prepared we are, the better we can serve you and personalize the message. Our goal is to make your program memorable and reinforce your decision to hire Rodney Loesch. When we personalize our programs, the meeting planners always end up looking like heroes.

This is a guideline of information we need from you. Please answer these questions and send them to us. Any other information about your company/organization, your people or meeting you can provide will be happily received. Rodney promises to read it and act!

Your Name \_\_\_\_\_

Title \_\_\_\_\_

Company/Association Name \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_ Web site \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Meeting Date \_\_\_\_\_ Length of Talk/Workshop \_\_\_\_\_

Meeting Type (Convention, Sales, Etc.) \_\_\_\_\_

**THE PROGRAM**

What is your **Program Theme**? \_\_\_\_\_  
\_\_\_\_\_

What does the **theme** mean to your group? \_\_\_\_\_  
\_\_\_\_\_

Who is responsible for **calling** this meeting (HR, Sales, Marketing, Annual Convention)?

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

What is the **name** and **title** of Rodney Loesch's **introducer**?  
\_\_\_\_\_  
\_\_\_\_\_

Exact **times** of Rodney Loesch's **presentation(s)**? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is the **best time** for Rodney to do his **a/v and room check**? \_\_\_\_\_

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How should Mr. Loesch **dress** for his presentation? \_\_\_\_\_

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What is Rodney's **role in the program**? (Opening or closing keynote, luncheon speaker.)

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Which **company/organization executives**, if any, will be **speaking before** Mr. Loesch?

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Please **forward transcripts** of their speeches to Mr. Loesch to read and use to tailor his speech.

Who are the **other professional speakers on this program**?

Speaker: \_\_\_\_\_

Topic: \_\_\_\_\_

Day: \_\_\_\_\_

Speaker: \_\_\_\_\_

Topic: \_\_\_\_\_

Day: \_\_\_\_\_

Speaker: \_\_\_\_\_

Topic: \_\_\_\_\_

Day: \_\_\_\_\_

What professional speakers have you **used in the past**? \_\_\_\_\_

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What did you like about their performance? \_\_\_\_\_

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**LOGISTICAL INFORMATION:**

What is the **nearest major airport** to the meeting site? \_\_\_\_\_

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For **transportation to and from the airport** to the meeting site.

Would you **prefer**?

To **meet** Mr. Loesch at airport: \_\_\_\_\_

To have Mr. Loesch take a **cab**: \_\_\_\_\_

Exactly **where** is the meeting? \_\_\_\_\_

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Hotel where Rodney will be **staying** if not the same as meeting? \_\_\_\_\_

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How **far away** from meeting location? \_\_\_\_\_

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Will you be using **image magnification** (IMAG)? Yes \_\_\_\_\_ No \_\_\_\_\_

Will a **video crew** be on site? Yes \_\_\_\_\_ No \_\_\_\_\_

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Who are the people within your organization **primarily responsible** for the following?

**President/Executive Director**

Name: \_\_\_\_\_

Exact Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Address if different from contact: \_\_\_\_\_

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**V.P. of Sales/Marketing**

Name: \_\_\_\_\_

Exact title: \_\_\_\_\_

Email address: \_\_\_\_\_

Address if different from contact: \_\_\_\_\_

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**Sales Training Manager**

Name: \_\_\_\_\_

Exact title: \_\_\_\_\_

Email address: \_\_\_\_\_

Address if different from contact: \_\_\_\_\_

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**AUDIENCE ANALYSIS:**

**Number** of attendees \_\_\_\_\_ **Percentage** male \_\_\_\_\_ female \_\_\_\_\_

A. Do you have **three key points** you want stressed in his talk?

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B. What are the **most important changes** happening in your company and industry?

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C. What keeps senior management **awake at night**?

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D. What are the **challenges** of your audience members?

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E. What are their **concerns**? \_\_\_\_\_

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F. What are their **fears** ? (Please be honest, this is **confidential information**)

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G. What are your **victories** as a company/association/team? \_\_\_\_\_

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H. What would you like to **accomplish** by Rodney speaking for your group?

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I. What does Rodney need to do to make his talk **worthwhile** to you?

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J. What percentage **entertainment** vs. **high content** techniques and strategies?

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K. Is there a **slogan** or **philosophy** that is commonly used in your association/company?

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L. Who will be **attending**?

1. **Make-up** of the audience sales, customer service, suppliers, spouses, etc.

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2. Should the **message** be targeted more to one group than another? If yes, which?

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3. What is the **life** of the **audience on a day-to-day basis**? (In office, field, long hours, etc.)

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4. What are the **frustrations** they have in their lives, company or industry? \_\_\_\_\_

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5. What are the **sensitive issues**? Topics/Subjects **not** to be mentioned? \_\_\_\_\_

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6. Anything **humorous** Rodney should know about? \_\_\_\_\_

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7. Any **industry jargon** Rodney should be aware of? \_\_\_\_\_

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In case of emergency or flight delays who and where do we call? \_\_\_\_\_

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As soon as they are available please send us:

A. The **agenda** of the conference/meeting.

B. Past conference/meeting **brochures**.

C. **Information** about the company/organization (corporate report, history of organization, publications and newsletters, etc.)

**After we have received your instructions in writing we would like a telephone appointment.**

Fax or mail information:

**Rodney M. Loesch CFP®**

**Loesch & Associates Inc.**

**P O Box 237**

**Moberly, MO 65270**

**Fax- 660-263-4716**

**Email rloesch@mcmsys.com**

**Three people valuable for Rodney to interview (Name, title, phone, fax, email)**

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