

PRE-PLANNING QUESTIONNAIRE

Every organization faces unique challenges and has distinct goals for its events. This questionnaire helps me understand your specific needs so I can tailor my presentation to resonate with your audience and address the issues that matter most to them. Whether you're focused on Investment fraud prevention, ethical decision-making, or due diligence, the more I understand your organization and objectives, the more relevant and impactful my content will be.

Once I receive your responses, we'll schedule a brief conversation to discuss your goals in more detail. This ensures I fully understand what you're looking to achieve and can design a program that delivers real value to your attendees. I aim to create an experience that not only engages your audience but also provides them with practical tools they can apply immediately. If you prefer, we can skip the questionnaire and have a planning call to cover everything together—whichever works best for you.

1. Date and time of presentation:
2. Format (in-person, virtual, or hybrid):
3. Audience composition and expected attendance:
4. Length of presentation:
5. Q&A session (yes/no and duration):
6. Event theme (if applicable):
7. Event objectives:
8. Specific outcomes desired for attendees:
9. Current concerns, problems, and challenges facing your group:
10. Sensitive areas to be avoided:
11. What will take place immediately before and after the program:
12. AV setup details (screen size, microphone type, clicker availability):
13. Recording plans (will the presentation be recorded):
14. Emergency contact person (name, phone, email):
15. Additional information about your organization that would make this program more meaningful:



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