PRESENTATIONS CHECKLIST

PURPOSE: This "Presentations Checklist" will help you to gather information for an upcoming group presentation to one of your clients, while following the Consultative Conversation Framework.

Done	Questions to Consider	Complete this checklist to prepare for your client presentation.
PREPARATION		
☐	How many people will be present and what time of day will it be? How much time is allocated for this presentation?	
☐	Will the final decision makers be present? What are their names? What are their roles? Their personality styles?	
☐	Will the key members of the audience be ready to make final decisions? Whose opinion will be influential?	
☐	Can they afford my fee, or price, or program, or terms? How will you provide more value to this company?	
☐	What will be the age, demographics & gender of the audience?	
☐	What will be their key concern? What problem or issue do they need to solve?	
☐	Whom do they respect or report to?	
☐	What will excite or please them?	
☐	What information will they want or expect from me?	
☐	What do they assume about me? What is your company's reputation to them?	
☐	What sort of style, format, or setup will the audience, room or situation dictate?	
☐	What is the organization's political, social, and economic state?	
☐	How will you apply the 8-Step Consultative Conversation vs. a Sell & Tell presentation?	

Done	Questions to Consider	Complete this checklist to prepare for your client presentation.
STEP 1: BUILD RAPPORT		
☐	What do I have in common with the audience? How will you adapt to their personality styles?	
STEP 2: ESTABLISH CONTEXT - PURPOSE/AGENDA		
☐	What is the purpose of this presentation? Do you have a detailed agenda?	
STEP 3: GAIN COMMITMENT TO PARTICIPATE		
☐	How will you make this interactive with the audience? How will you set this up to be consultative, rather than a sell/tell presentation?	
STEP 4: CONSULTATIVE QUESTIONS		
☐	What questions do you want to ask this group? Final decisions makers?	
☐	Are there any hidden or problems issues that will need special handling?	
STEP 5: SUMMARIZE & PRIORITIZE		
☐	What are their goals, and how will you prioritize their needs?	
STEP 6: EXPLORE SOLUTIONS		
☐	What solutions do you want to explore and present?	
☐	What will they need to hear from me in order for me to reach my goal? And	
STEP 7: ROI – RETURN ON INVESTMENT		
☐	How will you demonstrate ROI for them to validate? Do you have numbers or other customer success stories to share?	
STEP 8: SECURE GO FORWARD COMMITMENT		
☐	What is the next step likely to be?	