

# DR. JAMES SMITH, JR.

## Client Session

## Questionnaire



This questionnaire is provided to help us customize our session to meet your general and specific goals. Please take a few minutes to answer the questions and return the form within 48-72 hours to Shelby Krans (skrans@drjamesmithjr.com). Not all questions may be applicable.

*Thank you for helping us to create a  
PRODUCTIVE, FOCUSED and MEMORABLE experience.*

### LOGISTICS

Company Name or Professional Association:	
Event Date(s):	Approximate Number of Attendees:
Start Time:	End Time:

Session Coordinator's Information (person coordinating session logistics)	
Name:	
Email:	Phone Number:

### Virtual/In-Person

Will your session be virtual?      Yes       No

If virtual, what is your preferred webcast platform? (i.e. Zoom, Microsoft Teams, Cisco Webex)

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We prefer to use Zoom for virtual sessions and will provide the session coordinator with the access link 48-72 hours before the session. Please have the session coordinator distribute the Zoom link to the attendees. If you would prefer to use a different platform, please schedule a 30-minute production meeting with Shelby Krans (skrans@drjamesmithjr.com) at least one week before the scheduled session.

All virtual sessions will be recorded and a copy will be sent to you upon completion of the session(s). The recorded copy must be downloaded within 48 hours upon receipt as the link.

If your session is live/in person, please provide the following		
Address:	Building #:	
City:	State:	Zip:
Information about the person that will be meeting us upon entry		
Name:		
Email:	Phone:	

Note: We prefer to arrive 60 – 90 minutes prior to the session start time.

## ABOUT YOUR SESSION

What are your general and specific goals for this session and why?

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What have you done previously to accomplish these goals?

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Are there any organizational concerns that may be a barrier to your goals coming to fruition?

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Why is this session significant now?

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Are there any topics that should be avoided?

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## ABOUT YOUR ORGANIZATION

What are you most proud of about your organization (department, group or unit)?

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Is there any recent history in the group that Dr. James Smith, Jr. should be aware of (acquisitions, mergers, layoffs, reorganizations, negotiations, strikes or threatened job actions, recent death of a co-worker/association member, local controversy, legal battle, sudden stock price changes, attempted corporate takeovers, etc.)?

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## PULL THROUGH SUSTAINABILITY

What systems are in place to support and further the learner's development after the session(s)?

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Contact Shelby Krans ([skrans@drjamesmithjr.com](mailto:skrans@drjamesmithjr.com)) to schedule a time to meet with Dr. James Smith, Jr. to discuss support and resources we can provide moving forward.