

# Needs Assessment Worksheet for Presentations (summary)



Learn, Share, Prosper

Instructions: Answer the questions below, and then use your "score" to determine the scope of your effort.

**Name or topic of your presentation:** \_\_\_\_\_

**What's the purpose? What's at stake? How critical is the outcome?**

<b>1.</b>	<p>a. What is your <b>purpose</b> for presenting this topic to this particular audience?</p>	<input type="checkbox"/> To give a routine status update <input type="checkbox"/> To pitch a proposal or a project <input type="checkbox"/> To persuade people to contribute <input type="checkbox"/> To recommend a method or solution <input type="checkbox"/> To present a study or research findings <input type="checkbox"/> Other: _____
	<p>b. Is this a <b>casual</b> event, a <b>critical</b> event, or something in between?</p>	<input type="checkbox"/> Casual <input type="checkbox"/> Semi-important <input type="checkbox"/> Critical
	<p>c. How essential is it for you to achieve a specific <b>result</b>?</p>	<input type="checkbox"/> Not essential <input type="checkbox"/> Desirable <input type="checkbox"/> Vital
	<p>d. What happens if you <b>can't</b> achieve that outcome? What would transpire or not transpire? What's the opportunity cost?</p>	<input type="checkbox"/> Nothing significant will be lost or gained <input type="checkbox"/> Opportunity cost: _____

**What is your anticipated audience's frame of reference?**

<b>2.</b>	<p>a. <b>Demographically</b>, could your audience comprise any of the groups at right?</p> <p>These answers should help you fine-tune your presentation's <i>language, tone, and degree of formality</i>.</p> <p>If your audience might be <b>new</b> to your ideas or terminology, consider how to bridge the gap between their frame of reference and yours.</p>	<input type="checkbox"/> A particular age group _____ <input type="checkbox"/> Specialists within a certain industry, field, or discipline: _____ <input type="checkbox"/> An entrepreneurial, academic, scientific, government, or corporate background: _____ <input type="checkbox"/> Executives, directors, managers, peers, or instructors in your own organization: _____ <input type="checkbox"/> Political leaders or local decision-makers _____ <input type="checkbox"/> Other: _____
	<p>b. <b>Psychographically</b>, will your expected attendees have certain ideas, behaviors, personality traits, or thinking patterns that could help or hinder their ability to relate to you and your ideas?</p>	<input type="checkbox"/> Beliefs _____ <input type="checkbox"/> Values _____ <input type="checkbox"/> Political views _____ <input type="checkbox"/> Consumer patterns _____ <input type="checkbox"/> Other behaviors _____
	<p>c. Can you identify one or more <b>personas</b> (representative fictional characters) who embody typical characteristics of your anticipated audience?</p> <p>How would you describe that individual (or individuals)?</p>	<input type="checkbox"/> Age _____ <input type="checkbox"/> Education _____ <input type="checkbox"/> Work background _____ <input type="checkbox"/> Family/social life _____ <input type="checkbox"/> Goals or aspirations _____ <input type="checkbox"/> Fears or worries _____

# Needs Assessment Worksheet for Presentations (summary)



Learn, Share, Prosper

What actions do you want your audience to take as a result?		
<b>3.</b>	<p>One major purpose of your presentation should be — either implicitly or explicitly — to persuade your audience members to take some kind of action after they hear what you have to say.</p> <p>What is your <b>“call to action”</b>? Be specific what you want your audience members to do at right...</p>	<input type="checkbox"/> Embrace your proposal? <input type="checkbox"/> Follow your recommendations? <input type="checkbox"/> Purchase your products or services? <input type="checkbox"/> Approve funding for your projects? <input type="checkbox"/> Endorse you or your organization? <input type="checkbox"/> Contribute to your cause? <input type="checkbox"/> Accept your findings? <input type="checkbox"/> Something else? _____ _____
Where are you planning to deliver the presentation — in person or online?		
<b>4.</b>	<p>Be aware that there are some important differences between these two methods:</p> <ul style="list-style-type: none"> <li>❖ <b>In-person delivery</b> gives your audience exposure to your personal energy, which can be quite powerful.</li> <li>❖ <b>Online delivery</b> has recently become cost-effective and convenient for many; there is no travel involved, no need to reserve a physical venue, and so forth.</li> </ul> <p>Each venue has separate considerations (limitations or capabilities) that could affect your presentation. Try to research and even test the setting in advance.</p>	<p>I plan to deliver my presentation:</p> <input type="checkbox"/> <b>In person</b> at this venue: _____ Audiovisual issues or considerations: _____ _____ <input type="checkbox"/> <b>Online</b> at this venue: _____ Audiovisual issues or considerations: _____ _____
In the future, could your presentation possibly expand into something more?		
<b>5.</b>	<p>Can you envision any future applications of your presentation material that would benefit from early planning?</p> <p>For example, if you are planning to give your presentation in person next, might you later <b>expand or adapt</b> your material to do one or more of the following...</p>	<input type="checkbox"/> Deliver the presentation via a Webinar? <input type="checkbox"/> Create a self-paced training tutorial? <input type="checkbox"/> Develop a classroom training program? <input type="checkbox"/> Produce a marketing or educational video? <input type="checkbox"/> Design a product package with related reports, media, or other components?
Factor in your available time and resources, and then add up your “score”:		
<b>6.</b>	<p>What kind of <b>time, resources, and help</b> do you have available?</p>	<input type="checkbox"/> Plenty of time <input type="checkbox"/> Not much time <input type="checkbox"/> Ample resources <input type="checkbox"/> Few resources
<b>Low</b>	<p>If your requirements are fairly <b>low-key</b>, <b>or</b> you have relatively little time, <b>and</b> you have no plans to adapt your presentation for other uses in the future...</p>	<p>...you can make a strong impression and still produce your presentation fairly quickly using the scientifically supported <b>Artistic &amp; Multimedia Principles</b>.</p>
<b>High</b>	<p>If you have <b>fairly high</b> stakes, <b>and</b> you have more time, <b>or</b> you think you might later adapt the material for other uses...</p>	<p>...you should strongly consider applying the entire <b>Art + Science + Story = Impact</b> formula for the very best possible results!</p>