Meeting Planner Discovery and Program Success Questionnaire

College Innovation Program

Please complete the questions you can answer before our planning conversation. We will review the remaining items together and agree on the audience outcomes, success measures, evaluation process, logistics, and follow-through that best support your program.

1 Event and Contact Information

Organization or institution	**Primary meeting planner**
Event or program name	**Title and department**
Event date and time	**Email and telephone**
Location or online platform	**On-site decision maker**
Expected attendance	**Faculty or program contact**
Planning meeting date	**Post-program review date**

2 Program Format

1. Which program format are you considering?

☐ Keynote 45 to 60 minutes

☐ Interactive workshop 60 to 90 minutes

☐ Classroom case study 50 to 90 minutes

☐ Multi-session program or cohort

☐ Other: _____

2. What prompted you to consider this program now?

3. What other programming, curriculum, coaching, or support will surround this session?

3 Objectives and Definition of Success

4. What are the three most important outcomes you want from this program?

5. If participants remember only one idea, what should it be?

6. What should participants think, decide, or do differently after the session?

7. What would you like participants to accomplish within seven days? Within 30 days?

8. Complete this sentence: We will know this program was successful if...

9. Which outcomes should be measured?

- ☐ Identify the key uncertainty
- ☐ Identify required expertise
- ☐ Improve pitch or business-case readiness
- ☐ Increase confidence to proceed
- ☐ Other: _____
- ☐ Select an appropriate next test
- ☐ State a concrete next action
- ☐ Recognize partner and control risks
- ☐ Recognize when to pause or redirect

10. Are there institutional targets, grant requirements, accreditation expectations, or reporting measures this program should support?

4 Audience Profile

11. Who will attend?

- ☐ Student founders
- ☐ Incubator or accelerator cohort
- ☐ Engineering or technology students
- ☐ Health science innovators
- ☐ Alumni founders
- ☐ Advisers or mentors
- ☐ Other: _____
- ☐ Pitch competition teams
- ☐ Business students
- ☐ Design students
- ☐ Faculty researchers
- ☐ Community entrepreneurs
- ☐ Institutional leaders

12. What academic disciplines, professional roles, career stages, or experience levels will be represented?

13. What does the audience already know about entrepreneurship, innovation, validation, and commercialization?

14. Approximately how many participants currently have an idea, research application, project, prototype, or early venture?

15. Based on your current knowledge, rate the audience before the program.

Current participant capability	1	2	3	4	5
Can identify the most important uncertainty surrounding an idea	☐	☐	☐	☐	☐
Can distinguish assumptions from evidence	☐	☐	☐	☐	☐
Can select an affordable next test	☐	☐	☐	☐	☐
Can identify the expertise needed next	☐	☐	☐	☐	☐
Can state a concrete action and decision criterion	☐	☐	☐	☐	☐

1 = very limited clarity 5 = very strong clarity

16. Where do these participants most often become stuck?

17. What words, examples, campus initiatives, competitions, or current ventures would make the program feel especially relevant?

5 Program Customization

18. Which subject areas deserve the greatest emphasis?

- ☐ Problem and opportunity validation
- ☐ Market evidence
- ☐ Prototype decisions
- ☐ Intellectual property
- ☐ Legal and regulatory questions
- ☐ Financial readiness
- ☐ Manufacturing or technical feasibility
- ☐ Partners and governance
- ☐ Investor readiness
- ☐ Commercialization sequence
- ☐ Leadership and team roles
- ☐ When to pause, redirect, or stop
- ☐ Other: _____

19. Are there examples, terminology, internal sensitivities, or topics Gail should use, avoid, or handle carefully?

20. Will participants be permitted to discuss their ideas openly? What confidentiality boundaries should be observed?

6 Engagement and Evaluation

21. Which participation methods are appropriate for this audience?

- ☐ Individual worksheet
- ☐ Paired discussion
- ☐ Small-group exercise
- ☐ Audience polling
- ☐ Questions during the session
- ☐ Questions at the end
- ☐ QR code access
- ☐ Follow-up office hours or coaching
- ☐ Other: _____

22. Which evaluation methods are approved?

- ☐ Anonymous pre-program pulse
- ☐ Anonymous post-program evaluation
- ☐ Institution-provided survey
- ☐ Next Viable Step worksheet
- ☐ Talkadot speaker feedback
- ☐ Faculty or planner observation
- ☐ Seven-day action follow-up
- ☐ 30-day impact check
- ☐ Other: _____

23. Who will distribute pre-program questions, collect institutional data, and encourage post-program participation?

24. May Gail receive de-identified results and participant comments for program improvement and an outcomes summary?

25. What permissions apply to comments and contact information?

- ☐ Anonymous comments only
- ☐ Named comments with explicit permission
- ☐ No participant contact information
- ☐ Optional participant opt-in permitted
- ☐ Institution must approve follow-up
- ☐ No marketing follow-up

7 Room Technology and Participant Access

26. How will the program be delivered?

- ☐ In person
- ☐ Online
- ☐ Hybrid
- ☐ Recorded
- ☐ Other: _____

27. Describe the room, stage, seating arrangement, expected audience distance, and any fixed furniture or movement restrictions.

28. Which resources will be available and tested?

- ☐ Presentation screen
- ☐ Projector or display
- ☐ HDMI or USB-C connection
- ☐ Presentation clicker
- ☐ Handheld microphone
- ☐ Lavalier microphone
- ☐ Room audio
- ☐ Reliable Wi-Fi
- ☐ Mobile QR access
- ☐ Flip chart or whiteboard
- ☐ Registration table
- ☐ Technical support person
- ☐ Other: _____

29. Who is the technical contact, and when may Gail complete a sound and presentation check?

30. What accessibility, accommodation, captioning, language, dietary, mobility, or sensory needs should be planned for?

31. May Gail bring or distribute worksheets, assessment links, books, or supplementary resources? Describe any approval requirements.

32. What are the policies for photography, video, audio recording, social media, and use of event images?

33. What arrival time, parking, security, registration, dress, and campus access instructions apply?

8 Post Program Review

34. Who should participate in the immediate debrief and the results-review meeting?

35. Which information should appear in the outcomes summary?

- ☐ Attendance and response rate
- ☐ Key uncertainties identified
- ☐ Expertise participants need
- ☐ Recurring questions or gaps
- ☐ Recommendations for follow-up
- ☐ Other: _____
- ☐ Pre and post readiness ratings
- ☐ Next tests selected
- ☐ Seven-day action commitments
- ☐ Representative comments
- ☐ Potential next program

36. What evidence, observations, or participant actions would support repeating or expanding the program?

37. Who else should receive the outcomes summary or be invited into a follow-up conversation?

9 Planning Agreement

Complete this section together at the end of the discovery meeting. It records the shared expectations that will guide program customization and evaluation.

38. Primary audience outcome

39. Secondary audience outcomes

40. Agreed indicators of success

41. Evaluation methods and data permissions

42. Customization decisions and examples to include

43. Immediate follow-up responsibilities and deadlines

Meeting planner name and title	**Gail Nichols**
Date	**Date**

NEXT STEP | Confirm the program brief, evaluation plan, and post-program review date