**Pre-Class Call Questions**

*Stage: Pre-Class Call*

A close up of a logo

Description automatically generated

**Prior to call: Review Company details on Sales Force**

What roles will be among the target audience? (or confirm what’s on logistics)

What would you say are their main obstacles/challenges? Any pain points?

Will there be any leaders or key stakeholders present in the training? What are their names and roles?

How did participants come to be signed up in this training? (i.e. - voluntary, word-of-mouth, required by manager?)

Can you tell me a bit about the culture at \_\_\_\_\_\_\_\_? (ie- values? heavy meetings, 3 am emails, working weekends, highly collaborative, 24 hour response times, etc.)

Do most participants also access email on their mobile devices?

Are these company issues phones, and if so, are they allowed to download 3rd party apps onto them?

To your knowledge, do the participants (or people at \_\_\_\_\_) use OneNote? If so, do you know how it’s typically used?

How much travel is the group doing?

Any expectations around responses/email communication?

Confirm version of Outlook from logistics.

Confirming everyone is on a PC, no Mac users.

Confirming- Not using webmail

Does “the company” force archiving or auto-delete emails over a certain age?

Do you support using PSTs and/or Archiving? If so, is there a size limit to the PST or Archive file?

Is there a specific naming convention recommended or required to use?

Is there a standard location where they are supposed to store the file?

Will someone be on hand to assist with IT questions?

Will a representative be introducing me (the program) the morning of the training?

How is lunch being handled? Brought in, cafeteria on site…

Confirm location, date and start/end times

How will the room be setup? Will you have flip charts, markers, power strips, LCD Projector and Screen, and Name Tents for participants?

Will you be my escort in the morning?

I will arrive at \_\_\_\_\_ time. Does that work for you?

Here’s my cell phone #. Confirm theirs from logistics form

Any details regarding the training site I need to know? Do I need to check in with security?

ROSTER CHECK- do you need to ask for this? Material shipment confirmation if necessary.

Anything else you think could be helpful for me to know about this group/company?

Any questions for me? Feel free to reach out prior.

Onsite Pre-class letter: Would you be willing to forward an email to the group participants regarding general workshop information such as expected outcomes, materials to bring, etc.? I’ll email this to you in a moment, can link it to meeting invite/reminders.

Virtual Pre-class Letter: Once the logistics form has been returned, our virtual coordinator Nicole Gilbert will be sending you a pre-class instruction document to distribute with the participants. It will contain a link for the Adobe Connect Classroom as well as audio information and the pre-work for each participant, which includes the pre-class survey assessment to measure their level of productivity. Do you have any questions about the pre-class letter?