

# Presentation Intake Form Template

## Discover the Enneagram — Presentation

*Your time and skill set are valuable.*

- Before pitching a proposed price, make sure you clear your mind of negative self-talk or false thinking.
- You deserve compensation for your time, knowledge, and expertise.
- When people or organizations pay a fair price for services, they value them more, which translates into more intention, enthusiasm, and growth for them.

## Pricing Events

Set a going rate for:

Half Day: \_\_\_\_\_

Whole Day: \_\_\_\_\_

Ask for the organization or group's budget for the event. This will help you know if what they want and expect is doable.

## AUDIENCE BREAKDOWN

How many people will be there? \_\_\_\_\_

What kind of audience is it? (Check all that apply)

Single      Married and Family      Mixed  
Business      Religious      Growth

What is the average age range?

Younger than 18      18-25      25-35      35-45  
45-55      55-65      65+

Presentation Timeframe:

30-45 minutes      1 - 1.5 hours      2 - 2.5 hours      3 hours  
4 hours      5-6 hours      1.5 days      Other: \_\_\_\_\_

Christian or Non-Faith Audience?

Christian      Non-Faith

Are participants paying, or is it free for them?

Paid Admission      Free Admission

## PRESENTATION CONTENT

Purpose and Desired Outcome? (Check all that apply)

Discovering the Enneagram and the 9 Types

Exploring the Enneagram 2.0 (Wings, Paths, Instinctual Centers, etc.)

Team Building

Individual/Spiritual Growth

Family/Marriage Growth

Other: \_\_\_\_\_

Themes to Cover (Check all that apply)

Overview of the Enneagram

Overview of 9 Types (Key Characteristics/Core Motivations)

Gospel and The Enneagram

Deeper Elements - 2.0

- Levels of Alignment
- Wings
- Enneagram Paths
- Growth Path

Going Deeper 3.0

- Conflict Styles and Activators
- Communication Styles and Strategies
- How to Relate to each Type

Are you allowed to offer your products and services to those attending?

Yes      No

# Time & Travel

## TIME

How long will you be gone for the event + travel?

\_\_\_\_\_

## TRAVEL EXPENSES

Will they be reimbursing me for all travel expenses?

Yes    No    Only Part \_\_\_\_\_

Flying or Driving?

Flying    Driving

Hotel

They will book my room.

I will book my room.

Per Diem

The client gives me the per diem for each day.

I need to send them receipts.

What other travel expenses do I need to consider:

Parking at the airport

Tolls

Fees for luggage or early bird check-in

Uber or Taxis

Other: \_\_\_\_\_

# Presentation Room & Equipment

What technical equipment will be provided or accessible?

Projector

Slide transition remote

Whiteboard or large Notepad to write on (**note: markers and eraser needed**)

Microphone (**note: schedule time to do a mic check before the event**)

Computer:    Mac    PC

- *Note: Bring any Needed Dongles or Adaptors and Extension cords*

Room size: \_\_\_\_\_

How will participants be seated?

Circle    U-shape    Rows

Will they provide an A/V person to help you set up and run the event?

Yes    No

## CONTACT PERSON INFORMATION:

Name: \_\_\_\_\_

Contact info: \_\_\_\_\_

Their role or position: \_\_\_\_\_

When and how to contact them: \_\_\_\_\_

\_\_\_\_\_

## Invoicing for the event

Who do I send the invoice to? \_\_\_\_\_

What am I charging for this event? \_\_\_\_\_

The due date of invoice payment? \_\_\_\_\_

The deposit amount that is due at the time of scheduling? \_\_\_\_\_

Did I remember to include these costs?

- materials
- preparation time
- travel
- speaking fee