

## Insight's Audience Assessment Worksheet™

Use this worksheet to assess an audience or individual that you will need to influence.

### Part I: Description of Your Presentation and Its Benefits

What is the purpose of your presentation?

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| <ul style="list-style-type: none"> <li>◆ Cause Change</li> <li>◆ Gain Buy-in</li> <li>◆ Influence Decision</li> <li>◆ Inform</li> </ul> | <ul style="list-style-type: none"> <li>◆ Influence</li> <li>◆ Motivate</li> <li>◆ Inspire</li> </ul> |
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What is the idea or proposal that you plan to present to your audience?

What do you hope to influence your audience to do based on your idea/proposal?

What opening statement will you use to capture your audience?

List the benefits of your idea/proposal.

### Part II: Common Goal Focus

When two parties have different expectations, it's tempting to focus on what **you** want. In **successful influencing conversations**, it's important to emphasize points of agreement or common interests/goals.

Write down common goals/interests relative to your idea.

### Part III: Audience Assessment

1. In the first column, list the names of the people to whom you will be presenting. These individuals will include the following:
  - Decision makers—individuals who approve or reject your idea
  - Stakeholders—people who are affected by acceptance of your proposal
  - Influencers—people who have access to the stakeholders and decision makers and can sway their opinions
2. In the second column, list the benefits you think each audience member values most.
3. In the third column, evaluate your credibility relative to relationship strength and expertise. What is your plan to improve or build your credibility before your presentation?

Name	Benefit (WIIFT)	Engagement Style	Credibility (Relationship/Expertise)
Decision Makers			
Stakeholders			

Influencers			

**Part IV: Anticipate Questions & Objections**

- In the first column, write down key points of your presentation.*
- In the second column, anticipate any questions/objections that can be asked pertaining to your idea.*
- In the third column, write down answers to anticipated questions/objections. If you don't find answers prior to the presentation, write where and/or whom to consult for answers prior to the presentation.*

Key Points	Anticipated Questions/Objections	Answers

**Part V: Action Planning**

- In the first column, copy the names of the individuals just as you listed them in Part II.*
- In the second column, note how you plan to win each audience member's mind. That is, what benefits of your idea will you emphasize? What evidence will you provide to reassure your audience that those benefits are within their reach? What words will you use?*
- In the third column, note how you plan to win each audience member's heart. That is, what vivid descriptions, metaphors, analogies, and stories might you provide to connect with your listeners on an emotional level?*
- In the fourth column, note how you plan to acknowledge resisters' concerns and communicate your understanding of their concerns.*

Name	Actions to Win Minds	Actions to Win Hearts	Actions to Deal with Resistance
Decision Makers			
Stakeholders			
Influencers			

Source: Harvard Business Review, modified by Insight Strategies, Inc. 2013