

## SOA: Audience Analysis Worksheet

Use this worksheet to help you identify characteristics of your audience. See *Creating Content Meeting Workbook* on the Volunteer Resource web page for additional details.

Identifying Audience Characteristics and Learning Styles	
<b>Directions:</b> Please answer the questions to the best of your knowledge and check all answers that apply.	
1. What is the specific purpose of your presentation?	
2. Which professions may be attending your presentation? Check all that apply.	Actuaries ____ Accountants ____ Banking ____ Insurance ____ Asset Management ____ Other ____
3. What professional experience levels can you assume in your attendees? Check all that apply.	Newly hired ____ 2-5 years ____ 6-10 years ____ 10+ years in profession ____
4. What familiarity level can you assume that your audience already has with your topic? Check all that apply.	None ____ Basic Familiarity ____ Working knowledge ____ Experienced, but looking for new information ____
5. What prerequisite knowledge does your audience need to have about your topic to effectively understand and integrate your presentation?	

<b>Identifying Audience Characteristics and Learning Styles</b>	
6. Can you assume that your audience has this prerequisite knowledge, or should you cover it in your presentation?	<p>Audience has prerequisites ____</p> <p>Prerequisites will be included in presentation ____</p>
7. What is your audience's interest level in your topic? Check the most applicable option.	<p>Curious ____</p> <p>Subject matter only touches on responsibilities ____</p> <p>Work with subject matter daily ____</p>
8. What is your audience's motivation level to attend your presentation? Check all that apply.	<p>Getting their CPD requirement out of the way ____</p> <p>Adding to knowledge in subject matter ____</p> <p>Practical application of subject matter ____</p> <p>No other session available at this particular time ____</p>
9. How will you tailor the detail level of your presentation to the audience characteristics you just identified?	<p>Start presentation with statement about “what is in it for them?” ____</p> <p>Incorporate a basic overview into presentation ____</p> <p>Ask participants to share their expectations of your presentation ____</p> <p>Incorporate practical case studies or other practical application information ____</p> <p>Add details relevant to related professions into your presentation ____</p>

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<p>10. Which of the learning modalities sound like your audience?</p>	<p>Visual ___ Auditory___ Read-Write ___</p> <p>Kinesthetic___</p> <p>Mixed modality ___</p>
<p>11. Which presentation strategies will you incorporate for identified learning styles?</p>	<p>Communicate a “road map” for your presentation in the form of goals and objectives___</p> <p>Incorporate color and graphics into PowerPoint ___</p> <p>Incorporate time for questions throughout presentation ___</p> <p>Incorporate audience interaction into presentation ___</p> <p>Incorporate a pre-work reading assignment into your presentation which is discussed/debated___</p> <p>Provide learners with puzzles or cases to solve ___</p> <p>Incorporate cooperative group activities into your presentation ___</p> <p>Incorporate individualized projects into your presentation ___</p>