

BLUE OCEAN Coaching Co.

"A Sea of Possibility"

SALES AND CLIENT INTUITION ASSESSMENT

Consider your skills and strengths. Complete the Assessment below to evaluate your strengths and challenges.

SCORING: Score each item with a number between 1 and 4 as follows:

1= Rarely/Never 2= Sometimes 3= Most Times 4= Always

Attributes

- Am I focused on uncovering client needs?
- Am I an effective, organized priority manager?
- Do I have a clear vision that I can articulate with passion vision?
- Am I courageous and willing to take risks?
- Am I a creative thinker?
- Do I listen to dissenting opinions with interest?
- Do I embrace change?
- Do I use and develop my strengths in attracting new business?
- **Total score: ___/32**

Skills

- Do I articulate my key points clearly?
- Can I engage and inspire my client to see the big picture?
- Do I have a working strategic plan for my business?
- Do I understand and practice the value of deep listening?
- Do I ask the critical questions and anticipate challenges?
- Do I engage the client in a conversation to include his broader interests and needs?
- Do I have and use a system of scripts for presenting, selling and follow up?
- Do I regularly spend time reviewing and understanding new and changing guidelines?
- Do I delegate enough?
- Do I successfully follow my planning through to implementation and assessment?
- **Total Score ___/40**

Knowledge

- Am I confident enough in my knowledge and authority to lead transactions with clients/partners?
- Do I know my company mission and vision well enough to articulate them clearly?
- Do I know the relationship of the budget to my planning and marketing?
- Do I track my marketing/lead conversion and sales statistics vs. my goals?
- Do I know the best practices, trends and latest developments in my industry?
- Do I know and work to develop my authentic myself, my strengths and challenges?
- Do I use specific strategies to involve and communicate with my peers/staff?
- **Total Score ___/28**

Combined Score ___/100

100% - You're perfect and probably need to have your staff fill this out to see if they concur!

90-99% - Awesome. You should share your amazing skills to develop others

80-89% - Very Good. A True Leader, engaged in implementing your vision.

70-79% Good Potential - You possess many strong qualities that can be further honed for greatness.

Below 70% - A work in progress! Read, study, find a mentor; focus on developing your leadership strengths and passions.