

Assessment/Self-Inventory

Create your own "development plan" to leverage your strengths and bridge the gap in areas of opportunity (mindset, skills, execution.)



“In the end, that is the real work of an explorer: to share all that you have learned, to make it available to others, and to close that cycle that you started the you began your journey.”

— Robert Ballard

Perficiency-Selling 180 is an integral approach to sales achievement & business growth that's focused on both strategy and psychology of selling. We have seen countless sales professionals and business leaders waste hundreds of thousands of hours working on extensive proposals and chasing new business opportunities that never come to fruition. There are multiple opportunities each day to engage in an effective dialogue with prospects and clients that get squandered due to an ineffective mindset, or approach. We are passionate about creating a more effective way to manage & control the sales process, find and develop new opportunities for business growth and get optimal results—with the least amount of time and energy expended.

Assessment #1: Self-Inventory

Circle one (1 being low/strongly disagree)

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|---|--|
| 1. Right now, I'm achieving exactly the right levels of income, given my skills and talents. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 2. I rarely have to chase my prospects. My sales cycles do not drag out and my clients/prospects always do what they say they will do. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 3. I am absolutely fulfilled by my career/job. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 4. I generate exactly the necessary number of prospects and new business opportunities to make my goals. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 5. I currently have a systematic selling method/philosophy that keeps me in control of the sales process. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 6. I have no fear or discomfort in business situations, e.g. prospecting, referrals, rejection. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 7. My persistency rate is exactly what I want it to be. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 8. I have a support community that knows my business/personal vision and supports me unconditionally | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 9. I am not overwhelmed. I am satisfied with my level of efficiency and productivity in managing of my day to day priorities and focus. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |
| 10. I have a balanced lifestyle both personally and professionally. | 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 |

The following is a list of things we often see as a challenge in sales or any form of business development.

Check those that apply.

- Prospect doesn't tell me the whole truth
- Can't get to the prospect to make a decision
- Ineffective process for getting and managing referrals
- Prospects don't see and understand our value
- Inconsistency of motivation, effort, and execution
- Don't want to be perceived as pushy and needy salesperson
- Struggle with how to effectively deal with objections from prospects

Now, look back at this assessment and pick 3 areas that are working well, that you feel good about; and pick 3 areas that are not working well that you most want to improve. This begins the process of creating your own "development plan" for leveraging your strengths and bridging the gap in areas of opportunity (in mindset, skills, execution.)

Assessment #2: Free Association:

Setting the groundwork for learning and growth

Fill in the assessment below. Don't overanalyze each question. Read it, sit for a second and then go with your initial gut response. Is this something that you feel you do well, have a certain level of mastery at, that is true for you? Is this something that you struggle with practicing, believing, being true for you? The more honest you are up front, the more useful this material will be for you now, and later.

Assessing Your Business and Yourself

(Choose relevant questions and answer on a scale of 1-10, 10 being mastery, 1 being struggle mightily.)

- _____ I am open to new ideas and looking at myself—and my business—in a different way
- _____ I have passion around my job/career and enjoy what I do.
- _____ I am in a position at work where I know what's expected of me
- _____ I am in a situation where I have a chance to succeed financially
- _____ I am motivated by more than money
- _____ I have a disciplined, systematic process for how I go about my work
- _____ I have an opportunity to do what I love and am good at most every day
- _____ I enjoy the people I work with, both clients and co-workers
- _____ The process of business development is fun for me
- _____ There are more than enough clients out there for me, the marketplace is abundant
- _____ I am never begging for business, putting myself in a "one-down" position with my language, thinking or overall process with clients. I am in control and more often than not, have prospects and clients convincing me why it makes sense to do business
- _____ When I'm negotiating with clients and prospects, there aren't any questions that I get afraid or uncomfortable about asking
- _____ Prospects and clients feel safe with me and quickly trust me
- _____ I always feel like I'm getting the truth, and the whole story from my clients and prospects
- _____ I clearly understand and have no doubt about the value I bring to client interactions
- _____ I clearly understand and have no doubt about the value my organization, product, or service brings to our clients, what makes us different from our competition and that we are worth a premium price
- _____ I understand what kinds of challenges our prospects are facing when they look to hire us and can summarize that succinctly, off the top of my head
- _____ I understand what kinds of opportunities our prospects are looking to capitalize on when they look to hire us and can summarize that succinctly off the top of my head
- _____ I am always curious, looking to solve problems, understand what's working and what's not or my prospects and clients. I have the highest intent to see if I can help them
- _____ I'm open to the possibility that I might not be able to help some prospects, and/or that they may not be open to or ready for my help
- _____ I never get too attached to deals and specific outcomes and don't take "no" personally
- _____ I have a high regard for my own personal value and don't tolerate being treated unprofessionally, or an attempts to manipulate or bully me
- _____ I am confident, yet also humble about my abilities
- _____ I am always working on myself, trying to improve
- _____ I take care of myself, my body and do not beat myself up when I make mistakes
- _____ I am clear and passionate about what I do and why I do it

- _____ In sales situations with clients and prospects, I always understand their “compelling reason to change” before presenting a solution
- _____ I am earning exactly at the level that I want
- _____ I understand who my Ideal Clients are and can specifically describe them to you
- _____ I have turned down business before. I am not afraid to walk away from bad business
- _____ I am organized and systematic in my process for developing leads, generating new opportunities, within my existing client base and/or outside of it
- _____ I have no problem getting to the true decision makers within a client and prospective client organizations
- _____ There’s nothing that is uncomfortable or causes me stress/fear in selling and negotiating situations
- _____ I get productive, unconditional support from peer group, boss, coach, etc. when selling, negotiating, facing conflict at high levels. I am not alone when working on “big” deals
- _____ I know what my closing percentage is for all new business opportunities over the past year
- _____ I am never worried about competition
- _____ I really understand and am interested in what’s going on in the ”head” of my prospects and clients. I’m in touch with their thoughts, concerns, feelings.
- _____ I have a selling method, or philosophy, that allows me to feel in control of the selling/negotiating process
- _____ I do not get commoditized, pressured to negotiate on price
- _____ The sales cycle is the right amount length, never dragging on too long
- _____ I do not currently have any deals / opportunities in the pipeline that have stalled, or where I do not know where things stand or what the net step is
- _____ I feel that I am working on the right sized accounts and giving myself the optimal chance of attracting and retaining the right kinds of business, for sustainable growth
- _____ I am not resistant to ask for help when I need it
- _____ I feel passionate and am energized by my work
- _____ My work has no negative affect on my home life
- _____ I feel good about the role model I am for my children and anyone else who may be looking up to me
- _____ I understand I have habits and patters that don’t serve me, and am working to become more aware of them and make more health and productive choices
- _____ I am not afraid to take risks
- _____ I have no doubt in my ability to reach my goals (long and short term)
- _____ I feel good about where I am in my life right now

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“An open mind and willingness to improve are necessary prerequisites to progress.”

—David Hawkins Power vs. Force

Here are reasons why clients call us and the things we help them with. Why are you here?

Circle any that apply to you.

- Not enough deals in the funnel.
- Hard time getting phone calls/emails returned (with new prospects and even with current clients) when looking to connect on new opportunities
- Need to grow. Not growing fast enough. Hit a plateau.
- Desire for more accurate projections. More accurate data needed to analyze what's working and what's not in our sales process, time spent, etc.
- Don't really have a systematic sales process (not to mention mindset and guiding principles) that we run all client engagement opportunities through.
- Need to try something different. Gut tells them they need to do something.
- Differentiation a challenge, especially in the RFP Process.
- Want more big clients.
- Lost some confidence.
- Want to be more strategic about our business development efforts, our focus and consistency. Less peaks and valleys in prospecting.
- Desire to move from "survival mode" to "prosper mode."
- Concerned about retention or if they have the "right" team in place to take things to the next level.
- May use a system like Target Account Selling (or something comparable), but have a desire to deepen, pull together and more consistently execute a selling process that complements the missing pieces and inconsistent execution of TAS or it's equivalent
- My people need to call higher. They are afraid. They are often not talking to the true decision maker.
- Feeling pressure. No one to talk to, bounce things off of, get support, validation and challenge from in a safe environment
- Giving away too much and discounting without any pushing back or standing ground.
- Need to better qualify prospects and qualify them quicker. Shorten sales cycle and increase close percentage for those we take through the entire process.
- No one on the same page. Everyone off doing their own thing. Little group learning.
- Desire to work with fewer accounts that generate more business (more ideal clients).
- Missing opportunities for "low hanging fruit" with current clients that know us and understand our value. We're not asking that extra question or looking for that new opportunity actively. Too passive.
- Have to generate more revenue, but have a limited time and number of accounts to do it with.
- Clients don't seem to have the same level of urgency as the sales rep.
- Need better team morale, honest communication, safety and trust.
- Burnt out. Not having fun. Seem to be less effective and beating my head against the wall more these days.
- Enforcement issues. We have a sales process, but how do we know for sure they are using it and doing the right things?
- Not sure if our sales managers have the skills to proactively coach, develop, support and challenge our field staff to higher levels of productivity and retention.
- Sales managers don't get much attention at all. We forget about them.
- Heads down all the time. No time to reflect or work on new skills, new thinking.
- Lots of tolerance for half answers from prospects and clients. Not asking that next question or respectfully calling the prospect/client out to get more clarity and truth.
- We've been successful without anything new to date. And, now its important to upgrade and enhance the skills and level of professionalism/sophistication of the sales team.
- The marketplace, workforce, competitive issues are changing. We need to keep up.
- Reps get little or no active coaching on deals.
- Sales team is missing confidence. They don't really see their unique value.

- Sales reps often missing simple things like proper meeting prep to minimize wasted time.
- Reps often launch too quickly into a demo or are too quick to quote.
- Need to reframe how we sell. Less following the customers process and better defining ours.
- We are too transactional. We talk about being partners with our clients, but we don't always execute it well. We have good people trying hard but really have no process.
- Need to get past clients to re-engage. Don't know why we lost the business and they won't return calls.
- We need to know who we are. We need to focus and grow within that framework vs. trying to be all things to all people (which compromises our value proposition and our ability to deliver and grow.)
- We create neat plans and initiatives, do them for a week or so, and then let them drop off.
- Need a strategy and process and organization and focus to meet our goals—step by step.
- Need more confidence in selling situations.

“Traditional selling, influence and negotiation is ruled by the ego—pushing for answers, manipulating for control, and attaching to what it wants. When ruled by our ego we desperately want people to “get” our value, be validated, and win.

A Perficiency-Selling 180 approach is designed to neutralize the ego—yours and theirs. It is about facilitating a conversation from a position of strength and high intent that allows the prospect/client to open up and tell you the truth, quickly.

It is a respectful, honest dialogue between two adults.

Only then can you truly be in control, without being controlling. At this point, both parties can effectively decide if there is enough of a fit to move forward, or not.”

—Tom Batchelder