

Directions: Read through the following statements. On a scale from 1 to 5 (5 being the highest), rank your level of agreement with the statement. If you feel that an item does not apply to you, mark with N/A and discuss with your coach.

A. Time Management	Score
1. I am satisfied with how I spend 80% of my business day.	
2. I never feel I over commit myself.	
3. I usually tackle the A-1 most important task first and delegate B&C level priorities as much as possible.	
4. I have a structured weekly routine that sets aside uninterrupted time that handle priority tasks	
5. I have structured routines that allow ample time for my appointments	
6. I have time set aside for daily planning and documentation	
7. I have a structured weekly routine that sets aside time for marketing and business development.	
8. I never have to work later or on weekends to make up for time lost to distractions or interruptions	
9. I know that to succeed and create profitability, I can't do all of the work myself, so I practice delegation.	
10. I routinely assign tasks with very clear definition of what is to be done.	
Total	

B. Prospecting/Client Development	Score
1. I feel I have control over whether or not my business grows	
2. I enjoy thinking of new ways to promote my business.	
3. I have identified the ideal type of clients for the work I do.	
4. I can easily compile a list of past clients who could become referral sources.	
5. I have prepared scripts for myself and my employees to comfortably handle any and all inquiries from potential clients	
6. I routinely acknowledge and thank my clients, customers or influences who refer a matter to me.	
7. I have an Arsenal of stories I tell that demonstrate kind of work I do, the kind of people I help and why.	
8. I have compiled a list of my top twenty influences that I use as a guide in my marketing efforts.	
9. I have identified the distinction between A&B clients vs. C&D ones.	
10. I am comfortable asking for referrals.	
Total	

C. Vision	Score
1. I have a clear understanding of what "having a vision" for my business and life means.	
2. I have a clear 1, 3, 5, and 10-year vision.	
3. I know where I will be personally, professionally and financially.	
4. I regularly review my vision to see how my current life measures up.	
5. I am currently living my vision.	
Total	

D. Organization	Score
1. I feel and stay organized on a daily basis.	
2. All of my paperwork is filed and all files are put away.	
3. I have systems and processes for each activity that is performed	
4. I can easily access my paperwork and computer files.	
Total	

E. Goal Setting.	Score
1. I have an effective, written goal-setting system I implement at the beginning of each year	
2. My goals are always SMART (Specific, Measurable, Action, Reachable, Timed)	
3. I keep a list of my goals and needed action steps in front of me at all times while I am working.	
4. I track my goals weekly/monthly and know what I need to do in order to achieve them.	
5. I achieve 80% of my goals annually.	
Total	

F. Client Services	Score
1. I regularly deliver "wow" client service and am clear what it entails.	
2. I always exceed my clients' expectations.	
3. I am in the habit of under promising and over delivering.	
4. I provide value for my clients	
5. My past clients return to me for all their current needs.	
Total	

Business Development Diagnostic

G. Specialization	
1. I have a clearly defined area I specialize in and have all the tools I need to excel in it.	
2. I have a written definition of my ideal client	
3. I am recognized in the marketplace for my specialty.	
4. I regularly receive referrals based on my specialty.	
5. I perform my specialty with excellence and continue to develop and grow within my specialty.	
Total	

I. Closing	
1. My closing ratio is 75% or better.	
2. I have a written closing process and track it through the transaction so nothing slips through.	
3. I rarely blame external factors for my lack of closings	
4. I work only with clients who have the ability to close	
5. I still get a “thrill” from the close	
Total	

H. Qualifying Prospects	
1. I have a clearly defined and written ideal client profile.	
2. I am not desperate for clients and therefore don't show up appearing “needy”.	
3. I have a written series of qualifying questions I ask each perspective client in order to determine the feasibility of delivering “wow” client service.	
4. I am willing to turn my business away if I determine I cannot be successful in delivering the desired outcome.	
5. I am willing to turn business away if I need to expend too much effort for the desired outcome.	
Total	

J. Keeping the Pipeline Full	
1. My pipeline is always full	
2. My pipeline doesn't cycle between full and then empty throughout the year.	
3. The action steps I take to keep my pipeline full and produce results rather than spin my wheels.	
4. I have identified what action steps are needed to keep my pipeline full.	
5. I regularly complete the action steps needed to keep my pipeline full.	
Total	

Now average each section below:

Sections	Total	Divide by:	Average
A. Time Management		10	
B. Prospecting		10	
C. Vision		5	
D. Organization		4	
E. Goal Setting		5	

Sections	Total	Divide by:	Average
F. Client Services		5	
G. Specialization		5	
H. Qualifying Prospects		5	
I. Closing		5	
J. Keeping the Pipeline Full		5	

In what area of business development do you do best? _____

What area needs some minor tweaking? _____

Where do you need the most help? _____

What questions or observations do you have about your business development?
