

First & Last Name: _____ Company Name: _____

Email Address: _____ Industry: _____

Cell Phone: _____ Years in Sales: _____

Office Phone: _____ Length in Current Position: _____

1. What is your current position and what responsibilities are included?

2. What are your current strengths?

a. _____ c. _____

b. _____ d. _____

3. What are your current weaknesses?

a. _____ c. _____

b. _____ d. _____

4. What are your "Critical Success Factors" (CSFs) or "Income Producing Activities" (IPAs)?

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Do you currently measure these activities on a daily, weekly, or monthly basis?

☐ Yes ☐ No

	Goal	Actual
Average number of sales calls per day:		
Average number of reaches/connections/contacts per day:		
Average number of appointments set per day/week:		
Average number of presentations per day/week:		
Average number of customers per month:		

5. Who, other than you, holds you accountable?

6. On a scale of 1-10, how fulfilled are you in your career?

7. What are you doing to continue to learn new skills that will help you in your business?

8. On a scale of 1-10, how proficient are you at managing your time to be as efficient as possible?

(1 being "Reactive" and 10 being "Proactive")

9. What percentage of your time do you spend on Income-Producing Activities (IPA)? _____ %

10. On a scale of 1 - 10, how proficient are your selling skills?

(1 being "Poor" and 10 being "Excellent")

Prospecting:

Qualifying, questioning & probing:

Presentation skills:

Answering objections before they come up:

Closing:

Asking for & getting referrals:

11. What was your sales productivity in terms of income last year?

12. If 100% is your maximum potential, what percentage do you think you are currently operating at and why?

13. If you had a coach that held you accountable to doing the things you know you should be doing, what percentage increase do you think you could expect? _____ %

14. What does that translate to in terms of increased income?

15. What are my goals for the next 12 months?

16. How am I going to accomplish them? Who will hold me accountable?
