

Self Assessment

Give yourself a score for each question, where higher numbers are better. Total your score in each quadrant, then, add up all four quadrants to arrive at your Total Score in the bottom right. Note that the Efficiency quadrant scores are based on a 10-point scale where the others are based on a 5-point scale. That's the power of habits!

Measurement		Vision	
Question	Score / Answer	Question	Score / Answer
How much money did I bring in during the last year compared with how much I would have liked to? [Score 1 to 5]		Have I defined the areas where my ideal clients will be spending money in the future? [Score 1 to 5]	
How much time did I dedicate to BD in the last year compared with how much I would have liked to? [Score 1 to 5]		Do I have a clear brand I promote in the marketplace that is aligned with these areas? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my personal success? [Score 1 to 5]		Do I have a clear BD strategy for each step in the process, from generating leads to closing deals, and do I follow it consistently? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my team's success or, if solo, my success with my outside collaborators and strategic partners? [Score 1 to 5]		Do I have a vision for integrating current clients, strategic partners, and colleagues with my overall business strategy? [Score 1 to 5]	
Total Measurement Score (Max = 20)		Total Vision Score (Max = 20)	
Efficiency		Relationship	
Question	Score / Answer	Question	Score / Answer
Do I have an ongoing series of meetings to measure and track my success? These "meetings" can be just with yourself, with an accountability partner, or with your team. The key is that you allot time to managing your pipeline just as you do for managing any important project. [Score 1 to 10]		Have I identified—and written down—the key characteristics of my ideal clients? [Score 1 to 5]	
Do I have an easy-to-use system to measure and track my success? [Score 1 to 10]		Have I used these key characteristics of my ideal clients to identify and write down the organizations I'd like to get introduced to? [Score 1 to 5]	
Do I hold myself accountable for my commitments? [Score 1 to 10]		Do I have a method for investing in and being helpful to the most important people who will help me grow (clients, strategic partners, influencers)? [Score 1 to 5]	
Do I celebrate my incremental successes (not just the end goal of closing business deals but also the progress toward that end) personally and with my colleagues? [Score 1 to 10]		Do I have an appropriate number of touch points to stay top of mind with these most important people, and do I track my touch points? [Score 1 to 5]	
Total Efficiency Score (Max = 40)		Total Relationship Score (Max = 20)	
Total Score (Measurement + Vision + Efficiency + Relationship)			