



Management Assessment for Business Development & Project Communication Effectiveness in Technical Companies

Morgan Training Co. specializes in helping technical organizations improve their bottom lines by *increasing revenues, improving margins* and *decreasing miscellaneous costs associated with ineffective soft skills (project overruns, excessive turnover, wasted resources, etc.)*. Please use this assessment to identify any issues or challenges that might be negatively affecting your organization’s overall success, and help you determine if they are significant enough to warrant attention.

Step 1: Rate the issues: Rate each statement on a scale of 1-5 as to its negative impact on your business: 1 is no problem, 3 is medium and 5 is high (or N/A if not applicable).

Potential Issues/Challenges	<i>How bad is it?</i>		
	1 No or N/A	3 Med	5 High
<i>A. We’re struggling to meet our revenue goals.</i>			
<i>(Factors that may be interfering with success...)</i>			
1. Goal is not realistic/attainable			
2. Goal is unclear and/or not measurable			
3. Our opportunity pipelines are empty/weak/insufficient (“Sellers” are reactive, not proactive; prospecting skills are weak; messages are ineffective...)			
4. Our opportunity pipelines seem adequate, but our close ratios are low (Poor qualification of opportunities; key relationships not developed/leveraged; weak closing skills; don’t position value as ROI...)			
5. We are losing existing customers (Poor service; Unable to sell against lower price; Weak relationships; Don’t sell value...)			
6. Our sales cycles are too long (No defined sales process; poor control of the selling process; next steps aren’t clear; decisions drag out; “sellers” chase after decisions; they don’t create urgency...)			
7. Accurate forecasts are difficult due to #4, 5 & 6 above and too many assumptions			
8. Customer facing personnel are lacking necessary skills (technical, communication, sales, people skills, etc.)			
9. Missed opportunities occur due to internal sales support delays (Operations, Application Engineering, Pricing, Proposal and quoting process, etc.)			
10. Our presales and post sales (A/E’s, PM’s, etc.) are underutilized in our selling process. Their customer access and relationships aren’t maximized to gather sales information or sell “add-ons”.			
<i>B. We have difficulty meeting our margin targets.</i>			
<i>(Factors that may be interfering with success...)</i>			
11. Discounting is excessive			
12. We do too much “Unpaid Consulting” (giving away free resources in hopes of getting business)			
13. “Four-legged” (1 sales + 1 technical) sales calls are needed due to #8			
14. We can’t walk away from a bad fit. (Too much invested; empty pipelines...)			
15. Our negotiation strategies are weak, inconsistent, ineffective...			
16. We don’t have a well defined sales process (or it’s ineffective or inefficient), resulting in high expenses (and also low close ratio)			
17. We experience excessive customer concerns/unhappiness			
18. Resources are wasted due to communication difficulties between our customer facing personnel and internal sales support groups			
19. We have too much scope creep, changes and extras which we “eat”			

C. Our internal communication and project costs are high.			
<i>(Factors that may be interfering with success...)</i>			
20. Communication (email, texts, phone, etc.) is ineffective and inefficient. Best practices aren't used.			
21. Project delays and overruns are excessive			
22. We experience excessive turnover			
23. We are not developing our talent pool sufficiently			
24. We waste time in meetings (Excessive number; poorly planned; goals not accomplished...)			
25. Redo's and rework are excessive due to poor communication ("Read my mind" mentality; Make assumptions. Don't seek clarification...)			
26. Commitments are often not clear and are therefore not kept			
27. Some characteristics of the technical "mind set" negatively impact our business practices (Analysis paralysis; Don't ask/listen; Want to "tell"/convince with ALL the data; Relationships are not valued and utilized...)			
28. Our internal persuasion process and/or skills are lacking. Good ideas are passed by.			
29. Wasted resources: Communicate with everyone the same. No adjustment for colleagues and customers with different personalities or behavioral styles			

Step 2: Find Your Top Challenges: Identify your top issues from #1-3 above, as well as any others that might not be listed, that are having the most negative impact on your business or meeting your goals. Circle or highlight them.

Step 3: Quantify the Impact of These Challenges

- a) Using the chart below, consider the impact that these challenges have had on your business over the past 12 months, or will have over the next 12 months). Indicate quantity and ball park costs to the organization.

Impact	Quantity Over 12 month period	Cost	Total
Personnel changes			
Lost business			
Wasted resources			
Missed deadlines			
Missed opportunities			
Project overruns			
Wasted efforts			
Other?			
Total Costs			

- b) Realistically, what amount of the Total Costs do you think could be reclaimed (or gained) if your team/employees were better equipped to deal with the causative problems and issues? \$ _____

- c) How significant is this amount to the organization, i.e. what percentage of your annual profit is this number?
Improved Profit: ____ 0-25%; ____ 25-50%; ____ 50-75%; ____ 75+%

Step 5: Commitment to fixing: Assuming training/consulting existed that could address these issues and reduce their negative impact on the organization, on a scale of 0 (none) to 10 (very high), how committed are you (or is the organization) to fixing the issues? _____

Step 6: Contact Morgan Training: If you would like to talk with us about the results of your survey and whether we can help with your current situation, please call or email us: *Office:* 805-440-3490 *Email:* info@morgantraining.com