



# Diagnostic Assessment for Sales and Customer Interaction

If you are completing this assessment, then you're probably in a position where you're desirous of different results. Are you looking for increased sales revenue, reduced cost of sales, improved margins, happier customers, higher close rate, etc.? To determine if Morgan Training can help you achieve your goals, we need to understand what might be holding you back.

**Step 1:** Rate each statement on a scale of 1-5 as to its negative impact on your business. 1 is no problem, 5 is a severe problem (or N/A if not applicable). *Customers can be either internal or external.* You can complete multiple questionnaires from the perspective of your individual people or one from the perspective of your team/organization. Place an X in the appropriate box.

<i>Issue/ Challenge</i>	<i>How bad is it?</i>				
	<b>1 No or N/A</b>	<b>2 Low</b>	<b>3 Med</b>	<b>4 High</b>	<b>5 Severe</b>
<b><i>I. Overall Sales Goals</i></b>					
1. We struggle to meet our sales revenue goals.					
2. Our close ratios are low and we've had difficulty increasing them.					
3. Our sales cycles are long and we've had difficulty shortening them.					
4. Our prospecting pipelines are insufficient for meeting our future sales goals.					
5. We have difficulty meeting our margin targets.					
<b><i>II. Sales Issues</i></b>					
6. We have difficulty persuading and convincing customers about an issue or to use a different approach (or different technology).					
7. We struggle cultivating relationships with our customers.					
8. We have difficulty getting buy-in from our internal management/team.					
9. We don't understand nor do we use an effective selling/persuasion process when trying to sell our ideas, company products, our services or ourselves.					
10. We are uncomfortable in a persuasion/selling role.					
11. We tend to present all of our technical/product knowledge without fully understanding the customer's real needs.					
12. We have difficulty tying our technical capabilities to a business solution; therefore, we tend to present all of our technical information and hope that the customer sees how it fits.					
13. We tend to give customers a lot of information without asking for any commitment in return. ("Un-paid" consulting)					
14. We don't do a very good job qualifying opportunities as to the needs, wants, problems and motivating factors for action.					
15. We try to tell our customers/colleagues what they should do as opposed to helping them discover it.					
16. We have difficulty controlling the "selling" process—knowing what is going to happen next, so decisions tend to drag out.					
17. We have difficulty differentiating ourselves from our competition.					
18. When persuading/selling, we struggle positioning our value as a "Return on Investment" for our customers.					
19. We get a lot of "think it overs" and/or indecision and we spend a lot of time and energy "chasing" after decisions.					
20. We don't understand the importance of relationships in selling/persuasion (or it's an uncomfortable arena); therefore we don't attempt to develop them, especially at key levels.					
21. We have difficulty separating a real opportunity from a resource drain.					
22. We tend to not put tough issues on the table early in the sales process and they then come back to "haunt" us. (Changes, extras, etc.)					
23. We have difficulty applying win-win negotiating techniques and strategies.					
24. Our sales cycle is too long--we have difficulty getting prospects to make decisions.					
25. We have difficulty (or overlook) discussing budget/money and it often becomes a deal killer.					

26. We have difficulty dealing with “No’s” and Stalls.					
27. Our prospects show interest and are willing to meet with us, but we can’t get them to feel urgency and “close”.					
28. We often discount to get the business.					
29. We don’t know when to give up on an opportunity.					
30. We have difficulty “closing”--asking for a decision or commitment (weak skills, uncomfortable, etc.).					
31. We sell too “low” in our prospect organizations. We have difficulty approaching higher-level decision makers.					
32. We struggle keeping our existing business from moving to competitors.					
33. The role of our application engineers (sales support) is not clearly defined.					
<b>III. Communication Issues</b>					
34. We want to please our customers, but we tend to over commit and then have problems when we can’t meet the expected delivery.					
35. We have difficulty overcoming customer’s negative perceptions due to past events.					
36. We make assumptions as to what our customers want and this leads to confusion, extra work and/or upset customers.					
37. We are uncomfortable asking questions to get clarification on issues and instead we do what we think should be done.					
38. We do not follow-up effectively with our customers/prospects.					
39. We struggle establishing rapport quickly and easily with someone new.					
40. We have difficulty interacting/communicating with people who have different personality or behavioral styles.					
41. We struggle addressing tough questions and objections.					
42. We have difficulty getting colleagues and customers to make and keep commitments.					
43. We struggle transferring our “data”/information into clear and concise messages for our customers.					
44. We have difficulty eliciting information with questions. We’re more comfortable “telling” rather than listening.					
45. We have difficulty getting people to feel urgency and make decisions.					
46. We don’t get to the heart of issues with our colleagues/clients.					
47. We have difficulty dealing with irate or demanding customers.					
48. We tend to feel awkward and frustrated when communicating with others—especially someone new.					
49. We don’t like confrontation so we tend to give in to our customers. This often results in over commitment, under delivery, discounting, etc.					
50. We tend to make assumptions regarding work requests that often lead to wasted effort or costly redo’s.					
51. Our customers are unhappy with us or find us difficult to work with.					
52. We don’t follow effective meeting guidelines so we end up wasting time in meetings.					
53. We have difficulty delivering “bad news” or discussing sensitive topics with colleagues/clients.					
54. We struggle communicating and transferring customer requests to our colleagues internally, which results in not meeting customers’ expectations.					
<b>IV. Prospecting Issues</b>					
55. We lack a consistent approach for developing new business.					
56. We struggle defining and/or implementing the actions/behaviors that are necessary to reach our business goals.					
57. The time available in our schedules for prospecting is extremely limited.					
58. We have difficulty prospecting, whether in person or on the phone.					
59. We struggle getting add-on business from our existing customers.					
60. We struggle getting referrals to new opportunities from our existing customers.					
61. We struggle when prospecting at trade shows, industry conferences, etc.					
62. We are uncomfortable calling on decision makers who are high up in an organization.					
63. We have difficulty conveying our technical offering in an effective business value proposition that resonates with upper management.					

**Step 2: Identify Selling Situations:** What sales and customer interaction situations are in need of improvement?

Rate High (H), Medium (M), Low (L).

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|---|--|
| <input type="checkbox"/> Sell new opportunities from start to finish  | <input type="checkbox"/> Negotiate (pricing, delivery, scope increase, etc.) |
| <input type="checkbox"/> Conduct a customer meeting to understand a customer's situation and qualify the opportunity (Probing/asking; instead of telling) | <input type="checkbox"/> Ask existing customers about other opportunities    |
| <input type="checkbox"/> "Close"—Ask customers for commitments  | <input type="checkbox"/> Ask existing customers for referrals                |
| <input type="checkbox"/> Handle "Think-it-overs", No's and Stalls   | <input type="checkbox"/> Effectively prospect (via phone or in person)       |
| <input type="checkbox"/> Present solutions/technical ideas  | <input type="checkbox"/> Effectively "work" a tradeshow                      |
| <input type="checkbox"/> Develop better/stronger relationships  | <input type="checkbox"/> Handle tough questions and objections               |
| <input type="checkbox"/> "Sell" one-self or his/her ideas   | <input type="checkbox"/> Deliver bad news or discuss a sensitive topic       |
|   | <input type="checkbox"/> "Sell" internally (management/colleagues)           |

**Step 3: Find Your Top Issues.**

Identify your top issues from #I-IV and Step 2 above, as well as any others that might not be listed, that are the most severe, i.e. are having the most negative impact on your business or meeting your goals. Circle or highlight them.

**Step 4: Consider the Impact of These Problems.**

Over the past 12 months what impact have these problems had on your business?

Or

Over the next 12 months what impact will these problems have on your business if you don't fix them?

Consider personnel changes, lost business, unhappy customers who drained your resources, wasted effort due to rework, missed deadlines/goals, missed opportunities, wasted resources chasing poorly qualified opportunities ("unpaid consulting"), etc.

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**Step 5: Convert the Impact into \$.**

a. Over the past (or next) 12 months what have (or will) these problems cost (rough estimate) the organization?

	<u>Impact</u>	<u>Quantity</u>	<u>Cost ea.</u>	<u>Totals</u>
1.	Personnel changes.....	_____	times \$	= \$ _____
2.	Lost business.....	_____	times \$	= \$ _____
3.	Wasted resources.....	_____	times \$	= \$ _____
4.	Missed deadlines.....	_____	times \$	= \$ _____
5.	Missed opportunities.....	_____	times \$	= \$ _____
6.	Other _____	_____		= \$ _____

b. Total costs..... (Sum of lines 1-5)..... \$ \_\_\_\_\_

c. Realistically, what amount from line b do you think could be reclaimed (or gained) if you/your people were better equipped to deal with the causative problems and issues? \$ \_\_\_\_\_

d. 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 6: Commitment to fixing.**

Assuming training/consulting existed that could help address these issues, on a scale of 0 (none) to 10(very high), how committed are you (or is the organization) to providing such training and to fixing the problems? \_\_\_\_\_

**Step 7: 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:

**Morgan Training Co., LLC**

805-440-3490

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