



Client Self Analysis Form

(To complete this form, please use tab, arrows, or mouse to answer in boxes after question -which will type blue.)

Full Name:			
Prefer to be called:		Today's Date:	
Address:		Work Phone:	
City/State/Zip:		Cell Phone:	
Email Address:		Home Office:	
Birth-date:		Other Phone:	
Marital Status:		Maiden Name:	
Spouse Name:		Anniversary date:	
Children (names / ages):		Ethnic origin (optional):	
Grandchildren: (how many)		Religious Affiliation(opt.)	
Hobbies/ Interests			
Highest Education Level Completed:			
Degrees/Diplomas:			
Your Position /Title:			
If owner/CEO-how long have you owned the company?			
Years in current occupation:			
(If less than 2 years, describe previous occupation and highest income earned):			
Describe your current company (stats, type, market position, etc.)			
Who do you report to?			
Do you have quotas to meet?			
If so, describe (or attach copy)			

Describe your area or sales territory:	
Describe your product(s) and Feature/Benefits (or attach information) and include price point, terms, guarantees, etc.:	
Describe your sales process including type (inside/outside/inbound/outbound etc.):	

2025 Earnings:

Base Salary:	
Commission:	
Bonuses:	
A- Total income:	
B- # units sold:	
(A divided by B) Avg.\$ per unit:	
Do you file a W-2/1099 or both?	
If both, what is the breakdown between the two?	
Was 2025 your best year in income?	
If so, what would you say attributed to your success?	
If not, what was your best year (income)? and if not at your current position, describe that also:	

2026 Earnings:

Did you set a goal for 2026?	
If yes, please specify:	
Base Salary:	
Commission:	
Bonuses:	
Total income:	
# units sold:	
Gross sales volume:	

Do you have a written plan?	
If yes (provide a copy) is it broken down to yearly, monthly, weekly and daily goals?	

Where are you year to date (income/transactions/gross volume)?	
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❖ **Leads / Prospecting / Database**

List your source of leads from most to least and approx. % of your business. (Examples: sphere, past, advertising, referrals, floor, etc.)	
<u>Source</u>	<u>% of Business</u>
1.	
2.	
3.	
4.	
5.	
6.	

Do you have a tracking system for your leads?	
Are your leads generated for you, do you generate them, or both?	

Underline the best description of your current lead status:

- A. I have more leads than I know what to do with.
- B. I have the right amount of leads.
- C. I have either too many or not enough leads.
- D. I usually don't have enough leads.
- E. I have very few or no leads.

Underline the following which is most accurate for you?

- A. I need more leads.
- B. I need to convert more of my leads.
- C. Both A. and B. are true.

Do you prospect?	
If so, describe your process (phone/face to face etc.) and how often (Daily/1xweekly/when needed).	

Do you know your sales conversion ratios?	
If so, what are they?	
Do you have a contact database management system?	
If so, which one (ACT, Gold-mine, Agent 2000, Top Producer etc.) and to what extent do you utilize it to its fullest potential?	
Do you have a lead follow up system?	
If so, describe it and how consistently do you utilize it?	
Do you have a client follow-up system? If so, describe it and how consistently do you utilize it?	
How many past clients/sphere of influence do you have in your database?	
How often do you contact them asking for referrals?	

Underline the statements that apply where you have and use scripting (provide any of the scripting you might have):

1. No Scripts
2. Opening Statement (for each source)
3. Pre-qualifying/initial interview
4. Presentation/Demonstration
5. 3-6 step voice/email follow up
6. Objection Handling/Closing
7. Competition

❖Work Time and Life Balance

How many hours do you work each week? (Be honest)	
How many days off do you take each week (with no interruptions and completely disengaged from business)?	
How often does your business creep into your personal life? (make sure your spouse or significant agrees with your answer)	
Do you have set days off?	If so, what days?
How much vacation time do you take each year?	
Where do you usually go on vacation?	

Underline the best description of your personal time off:

- A. I get all the time off I want.
- B. I get most of the time off I want.
- C. I get enough time off for the most part but would like more.
- D. I get very little time off but am ok with that.
- E. I get very little if any time off and need more.

Underline the best description of your Life Balance (Spiritual, Marriage, Family, Health/fitness, Personal interests etc.):

- A. I am very well-balanced, and all of my life accounts are full.
- B. I have a good life balance and most of my life accounts are full.
- C. I would overall like to improve my life balance.
- D. I am out of balance in my life and need help.

If you answered B, C or D to the above question, list the area in your life where you would like to improve in:	
How much time (in hours) do you spend each week in the following areas:	
Spiritual	
Marriage	
Family	
Exercise/Fitness	
Personal interests	
List any organization/civic group/club/ & church you are members of & your role + time involved:	

❖ Sales Skills

Rate your sales skills (scale 1-10 10 being high)	
1. Prospecting:	
2. Initial greeting/Rapport building:	
3. Pre-qualifying/Interviewing:	
4. Demonstration/Presentation:	

5. Negotiation:	
6. Objection handling/closing:	
7. Client Care/service:	
8. Customer follow-up-referral ask:	
9. Controlling the Sales Process:	
10. Overall Sales Skills:	
How would you rate your sales level in your field? (Place "X" next to appropriate)	
A. Champion = Upper 1%	
B. Top Producer = Upper 10%	
C. Consistent = Upper 50%	
D. Inconsistent	
E. New or inexperienced	

❖Time Management

Describe a typical day for you:	
Would you say you control your business or does your business control you?	
Do you have a daily plan that you follow? If so, describe your daily plan:	
What is it about sales and your current position you like most?	
Least?	
What would say are your 3-4 top <i>High</i> Payoff activities?	
What 3-4 of your <i>Low</i> Payoff activities that you currently do would you like to remove from your plate if you could?	
On a scale of 1–10, 10 being high rate your Time Management skills:	
Describe for me what (if any) time management system you use:	

❖Your Competition / Product Knowledge / Needs

Describe your competition including strengths and weaknesses and how your product/service differentiates (or provide the scripting):	
Rate your product knowledge (scale 1 – 10, 10 being high) for your product/service (rate for each product/service):	
Rate your product knowledge (same scale) for your competition:	
Describe your understanding of the sales process (steps):	
What are your strengths/development needs in that process?	
Sales Strengths:	
Sales Development Needs:	
In what part of the sales process do you most often get stalled?	
What have you done in the past 12 months to improve your sales skills? (List all: Seminars, Books, CD's/Tapes, Classes and Training)	
Which one had the greatest impact on you? Why?	
What are your greatest needs right now in your business?	
Greatest needs in your personal life?	
What are the biggest obstacles you see as standing in the way of becoming all you can be in your business/personal life?	

❖Looking at the Big Picture

What have been your greatest accomplishments in your life?
What have been your biggest disappointments?
If you could be or do anything you want right now, what would that be?

What are the barriers holding you back from achieving that?	
What is /are your biggest dream(s)?	
What are your greatest fears?	
Are there any crisis/trials you are facing now that is affecting your business/personal life?	
Tell me about the greatest obstacle you overcame in your life and what the final result or outcome of clearing that hurdle has been:	
What is most important to you?	
Give me three adjectives that describe you?	
Where do you want to be one year from now? (Describe in present tense as if you are actually there. Be very descriptive. What does your business and personal life look like?)	
Where do you want to be in 3 years?	
In 5 years?	

What would you do with your money if you grew by the following income increments this year?	
\$ 10,000	
25,000	
50,000	
100,000	
200,000	
What income gain would you like to see?	
Do you believe you can achieve that?	

❖ **Marketing**

Do you have a Marketing Plan?	
Is your Marketing message and approach giving you the results you desire?	
What would you like to change regarding your Marketing Campaign?	
Are you satisfied with your website?	
If you could change anything about your web site, what would it be?	
What do you need to add, delegate, change or improve in your business to take it to the next level?	
What is it in your business that you know you should be doing but are not currently doing?	
What one thing, if you were to master, would have the greatest impact on your business?	

What are your expectations of your coach?	
Do you really want to do better?	
In increasing your income?	
In improving your Life Balance?	
Are you willing to change and apply the advice your coach gives you?	
Are you willing to invest in yourself in money, time and energy?	

Describe your personal:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	

Is there anything else I should know about you that hasn't been mentioned yet?

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I have answered this accurately, honestly and objectively.

Client name		Date	
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