

Large and Complex Deal Closer Self-Assessment

This statement would describe me										
0	1	2	3	4	5	6	7	8	9	10
Never		Some of the time				A lot of the time			Always	

Question or Statement	Score out of 10
A master of basic selling skills	
1. I qualify prospects upfront, assessing their ability to purchase and invest.	
2. I assess the probability of the prospect choosing us as a vendor and adjust my investment in them accordingly.	
3. I am able to identify when there are opportunities to cross-sell, add-on, and up-sell.	
4. I know the common objections and concerns about my product and service offerings and either preemptively handle them or am prepared to effectively do so.	
5. I can recognize buying signals, both verbal and non-verbal.	
A problem solver	
6. I present my products and services as solutions to the core pains and challenges of my clients that I have identified.	
7. I am open-minded and put aside my bias and agenda in order to truly understand and comprehend client challenges and pains.	
8. I pull in internal and external resources to logically and laterally solve client challenges and problems.	
9. I apply my problem-solving skills to creatively find ways to be more effective as a sales person and team member.	
A project coordinator	
10. I have a system of checks and balances that enables me to ensure that projects remain on track and on time.	
11. When supporting clients I systematically keep track of personal and corporate commitments to them and follow up with my team to ensure that we deliver what we promise.	
12. I effectively use a time management system and contact management programs to enable me to handle projects efficiently.	

An information gatherer	
13. I formally research client industries and companies before the call and periodically during the relationship.	
14. I use a good balance of mediums to research client industries and companies including the internet, news releases, industry periodicals, stock market reports and filings etc.	
15. I use non-formal mediums for research such as networking and information-sharing with vendors, salespeople, and individuals who are involved in my target industries and companies.	
16. I use a structured needs analysis process that explores all aspects of the clients' business and all applications of our solutions to their business.	
17. I am informally gathering client information and assessing needs in conversations and other communications.	
18. I am constantly educating myself on all of the products and services I sell, ensuring an ever increasing in-depth understanding of my offerings and their applications.	
A rapport builder	
19. I can identify a persons' dominant personality style and shift my communications to appeal to their values and communications style.	
20. I am aware of peoples' posture, tonality, and level of extroversion, and adjust my communications style to make them comfortable.	
21. I am totally present and sincerely focused on people when we are communicating.	
A competent negotiator	
22. I rarely focus on price; I sell value, uniqueness, peace of mind, and the long-term relationship.	
23. I have a game plan before I start negotiating and know where the line is between a profitable achievable deal and one that isn't worth doing.	
24. I don't take negatives, insults, or pressure personally and realize that these things may be a ploy to get me to drop my price or to lose my objectivity.	
25. I uncover the core needs, fears, goals, and interests in the deal early in the negotiations process. In turn this allows me to fashion and promote an agreement that the prospect will buy into.	
A customer-focused person	
26. I understand that being customer focused is not about pushing my agenda, it's about identifying what the client wants, what their credibility model and timeline is and providing a solution that meets these factors.	
27. I have great after-sales service and proactively monitor the client for future needs and challenges to ensure that they are totally satisfied.	
28. I listen intently and search for the truth in client complaints and am humble and quick to remedy problems that have arisen.	

A partner / team player	
29. I respect support staff and senior executives' time that I work with. I only bring them in on a deal that is qualified; furthermore I only bring them into meetings that are relevant.	
30. I am constantly communicating with and supporting my internal team.	
31. I recognize the other people that made the deal possible. Even though I earned the commission for closing the deal, I let my team know how valuable they are.	
32. My clients don't see me as a salesperson but as a resource and a partner because of the strong team with which I am associated.	
A trainer / consultant / facilitator	
33. I can effectively teach/train clients to transfer the knowledge necessary for them to make an educated decision.	
34. I can engage a group of my peers and clients and facilitate a productive results-focused meeting.	
35. I can articulate my recommendations to clients in a clear understandable way.	
A networker	
36. I am well connected and trusted with all the key players inside of my company.	
37. I am well connected and trusted with all the key players inside of my client companies.	
38. I am well connected and trusted with all the key players inside of my industry and community.	
39. I know that information is power and I am constantly searching for new and competitive ways to tap into profitable networks.	
40. I understand that for a good networker, being referable is much more important than gathering leads or referrals.	
An effective analyst	
41. Gathering information and networking is great place to start. Analysts take it to the next level, and as an analyst I understand what the information means and what key indicators to look for.	
42. In large complex implementations or sales, my technical knowledge and discernment is what makes me a great closer and partner.	
43. Truly being an analyst takes me well beyond being a salesperson; in the eyes of the client I am seen as a trusted advisor.	
A good decision maker	
44. I know that people rarely have all of the information and analytics before making critical decisions, but I know when I have enough insight to make the right decision (quickly).	

45. I am a rapid, accurate and confident decision maker.	
46. I tend to evaluate each choice in terms of its consequences. I use my standards and criteria to determine the pros and cons of each alternative.	
47. I translate my decisions into action quickly with a strong, well thought out implementation plan.	
48. I am able to articulate and garner support for my decisions from clients and from my team.	
A master presenter	
49. I am great at pitching groups of people on concepts in an engaging, upbeat, credible way.	
50. I read my audience and adjust my presentation style accordingly.	
51. I start strong, rapidly build rapport, and leave the audience motivated to take the next step in the deal.	
52. I use visual aids and technology effectively in my presentations.	
53. Although I use visual aids, technology and hand-outs I make sure that I am the focus of the presentation; after all they are buying from me not a Power Point.	
A master of proposals	
54. I deliver a customized relevant outline that is to the point and addresses key benefits, return on investment, and also builds confidence in me, my company, and my solution.	
55. I know that not every prospect or inquiry is qualified enough for me to invest the time to write an in-depth proposal, and I act accordingly.	
56. I have many uses for proposals including: to confirm a verbal agreement, a support document for a legal agreement, a road map for project management, or a stand-alone sales tool.	
57. My proposals enhance and accelerate the sales process toward a close.	
A credit manager	
58. I know the client business and their upside potential for revenues.	
59. I get to know which clients may pose a risk to the company if they've extended too much credit.	
60. At times I get involved in the collection process with my financial team, ensuring that they reach their desired goal and if at all possible keep the client as well.	

A listener	
61. About 70 % of my sales process is spent listening.	
62. I have tools for systematic listening such as needs analysis, client questionnaires, and customer service audits.	
63. I use questions that direct and guide the client to relay and communicate key information that will help build the relationship and prescribe the right solution.	
64. I give the client a chance to talk, think, and explore and they will often tell me what they want and need.	
A master of follow-up and follow-through	
65. I use frequent, value-added contact over a period of time that builds strong relationships with my clients.	
66. I have rapid follow-up after each key step in the sales process often using a variety of mediums. The mediums include: e-mail, social media, mail, telephone, in-person visits or even calls from my team.	
67. I have a system in place that ensures that I contact key accounts on a regular basis. This system, and not my emotional state, drives my sales process.	
68. I often pick up the phone or send an e-mail or letter to a client just to let them know I've been thinking about them.	
Total:	/ 680

Notes, Comments and Personal Action Steps:
