

Current Status Evaluation

Name		Date of Birth		Today's Date	
Home Phone			Work Phone		
Fax		Pager		Cellular	
e-Mail			Web Site		
Home Address		City		State	Zip
Work Address		City		State	Zip
Occupation			Company Name		
Check the items that apply. <input type="checkbox"/> Self-Employed <input type="checkbox"/> Work for Someone Else <input type="checkbox"/> Plan to be self-employed. If so, how long?					
Classify your occupation: <input type="checkbox"/> Professional <input type="checkbox"/> Retail <input type="checkbox"/> Sales <input type="checkbox"/> Service <input type="checkbox"/> Home-Based <input type="checkbox"/> Network Marketing <input type="checkbox"/> Other					
Referred to or heard about Bonnie from:					

The purpose of these two exercises is to determine the three things you want most to improve. After you complete the bottom and second page of this worksheet, list your three priorities based on your selections in the two exercises.

Analyze Your Business Skills: Below are many of the different "hats" you must wear in order for a business or career to be successful. (This is true whether you work for yourself or for someone else. In other words, even if you work for someone else, you have to market yourself, sell your ideas, have a personal vision, etc.). To the right of each category, mark with an "X" where you believe you are currently, and then mark with a star "*" where you want to be in the next three months. Circle your top three priorities.

	Not Satisfied	Somewhat Satisfied	Satisfied	Very Satisfied	I am an Expert
Profession (what you do for a living)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Entrepreneur (create and share a compelling vision)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Leadership (getting cooperation and participation from others)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Operations (managing processes and day-to-day activities)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Financial (understanding the financial health of business)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Handle Administrative Aspects of Business	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facilities Management (space and equipment)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Human Resources (coaching and training, hiring, and firing)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marketing (meeting people and turning them into prospects)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales (turning prospects into customers)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer Services (keeping promises, follow-ups)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Determine Your Lifestyle Traits: Put a mark in the part of the spectrum where you think you are, relative to the choices on each side. When you are done with each section, pick the top three areas you want most to improve. Mark them on the right as a 1, 2, or 3, with "1" being your highest priority. When you finish this page, go back to the front of the form and list your top three priorities.

Business Development		Priority
Don't have/share compelling vision with others	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Have and share compelling vision with others _____
Don't know all business functions	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Take responsibility for all business functions _____
Don't know the sales cycle	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Use the sales cycle effectively _____
Don't know how to manage cash flow	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Manage cash flow, follow budget (with savings) _____
Don't have a niche or specialty	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Am known for and expert at specialty _____
Over-promise and under-deliver	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Under-promise and over-deliver _____
Few referrals from clients and networks	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Many referrals, wide client base _____
Provide poor quality goods and services	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Customers delighted with goods and services _____
Business is stagnant	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Business is expanding _____

Professional Development		Priority
Career/Profession not aligned with values	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Career/Profession chosen due of life's values _____
Am not master/expert of trade/profession	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Master and expert of my trade/profession _____
Lack tools/equipment/knowledge to succeed	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Have and use tools/equipment/knowledge _____
Don't manage projects or processes well	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Successful at managing projects and processes _____
Can't overcome objections and close sales	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Successfully overcome objections / close sales _____
Poor communication (speaking, listening, writing)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Excellent communication skills _____
Only working in business (doing daily tasks)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Spend time working on business (visions, plans) _____
Don't compete tasks, projects, goals	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Compete tasks, projects, goals _____
Become defensive when faced with feedback	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	View feedback as a way to learn and improve _____

Personal Development		Priority
Don't know who I am or where I'm going	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Clearly defined vision, values, mission/purpose _____
Dissatisfied with relationships with others	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Satisfied with relationships with others _____
Dislike appearance, health, and fitness level	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Satisfied with appearance, health, fitness level _____
Unfulfilling, stagnant, unbalanced lifestyle	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Fulfilling, dynamic, balanced lifestyle _____
Lack of motivation, enthusiasm, energy	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Motivation, enthusiastic, energetic _____
Negative self-image, question self-worth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Positive self-image, confident in self-worth _____
High stress level, don't manage stress well	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Low stress level, manage stress well, can relax _____
Hurried, rushed, feel pressured, often late	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Calmly and easily manage time, early or on time _____
Don't know what I need or how to satisfy needs	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Am assertive in order to satisfy my needs _____

Process/Project Management		Priority
Don't have vision of desired outcome	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Clearly defined vision of desired outcome _____
Don't set specific, measurable goals	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Goals are specific, measurable, and in writing _____
Unable to develop achievable action plans	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Able to develop achievable action plans _____
Take on all responsibilities, do all the work	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Delegate responsibility, motivate others to action _____
Unable to see roadblocks, obstacles, delays	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Foresee and plan for roadblocks, delays _____
Don't identify needed resources	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Know how to and do identify needed resources _____
Don't manage resources well	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Know how to and manage resources well _____
Don't measure progress	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Know how to and measure progress _____
Stick to original plans no matter what	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Can adjust to circumstances as they arise _____
Don't evaluate results, return on investment	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Can and do evaluate results, ROI _____
Can't identify lessons learned	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Identify/Use new awarenesses, lessons learned _____
Don't recognize, reward, celebrate successes	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Recognize, reward, celebrate wins/successes _____

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