

INDIVIDUAL BUSINESS ASSESSMENT

How accurately do the following statements describe you?

1 being the lowest level of accuracy and 10 the highest.

Mindset/Money

1. I see my job as a career, not a short term financial fix.

1 2 3 4 5 6 7 8 9 10

2. I maintain high energy and am highly motivated.

1 2 3 4 5 6 7 8 9 10

3. I have a financial plan in place (wealth creation).

1 2 3 4 5 6 7 8 9 10

4. I am aligned with my goals and know how to execute on them.

1 2 3 4 5 6 7 8 9 10

5. I have a "can do" attitude.

1 2 3 4 5 6 7 8 9 10

6. My attitude is positive and I am a demonstration of my core values and my company mission.

1 2 3 4 5 6 7 8 9 10

7. I take massive action and go above and beyond in my efforts to service clients.

1 2 3 4 5 6 7 8 9 10

8. I am creative when it comes to creating business opportunities and the way I service my customers.

1 2 3 4 5 6 7 8 9 10

9. I possess problem-solving skills and display confidence in selecting products/solutions for my clients.

1 2 3 4 5 6 7 8 9 10

10. I embrace the sales culture.

1 2 3 4 5 6 7 8 9 10

11. I am efficient in managing my time and prioritizing tasks.

1 2 3 4 5 6 7 8 9 10

12. I'm able to eliminate distractions and stay focused on the tasks.

1 2 3 4 5 6 7 8 9 10

13. I am more focused on results than efforts.

1 2 3 4 5 6 7 8 9 10

How accurately do the following statements describe you?
1 being the lowest level of accuracy and 10 the highest.

Marketing

14. Me and/or my business are well known in the space.

1 2 3 4 5 6 7 8 9 10

15. I have a clearly established brand message (vision statement, mission statement, core values, tagline, brand pillars, value proposition).

1 2 3 4 5 6 7 8 9 10

16. I have a heavy focus on promotion.

1 2 3 4 5 6 7 8 9 10

17. Majority of my leads (business) come from digital promotion.

1 2 3 4 5 6 7 8 9 10

18. I know how to create relevant content for promotion.

1 2 3 4 5 6 7 8 9 10

19. I have an efficient marketing plan in place (I know exactly what product/offer I promote, through what channel and when).

1 2 3 4 5 6 7 8 9 10

20. I have established my perfect customer persona.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

21. Marketing and advertising play a significant role in my business cycle.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

22. I am consistent and frequent (3+ outreaches a day - SM, email, etc.) in my promotion.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

23. I am very efficient in multipurposing the promotional content.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

24. My content has high engagement rate.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

25. I often hear from prospects that I promote too much.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

26. All my offers/content have a clear "call to action".

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

How accurately do the following statements describe you?
1 being the lowest level of accuracy and 10 the highest.

Sales

27. I am confident and productive at handling incoming and outgoing calls.

1 2 3 4 5 6 7 8 9 10

28. I establish my targets and game plan on a daily basis.

1 2 3 4 5 6 7 8 9 10

29. I have time reserved each day to follow-up deals that didn't close.

1 2 3 4 5 6 7 8 9 10

30. I have a well established and clear sales process.

1 2 3 4 5 6 7 8 9 10

31. I follow the sales process at all times.

1 2 3 4 5 6 7 8 9 10

32. I am actively prospecting to create business opportunities.

1 2 3 4 5 6 7 8 9 10

33. My average lead conversion is high.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

34. I have a lot of repeat customers (high transaction frequency).

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

35. I always ask the right questions to land clients on best product.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

36. I am confident in handling objections and am persistent in the sales cycle.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

37. I am able to perform efficient demonstrations, ensuring the product is exactly what the client needs.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

38. I handle digital customers different than in-person sales.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

39. Every client interaction results in a written offer.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

In the section below, input your assessment scores for each statement. This interactive PDF document has been formatted to calculate your final scores and to determine how you and your company are doing. If doing it manually, follow the instructions below.

Money/Mindset

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____

Total Sum: _____

Percentage Score:

Total Sum: ____ ÷ 1.3 = ____

Marketing

14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____

Total Sum: _____

Percentage Score:

Total Sum: ____ ÷ 1.3 = ____

Sales

27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____
37. _____
38. _____
39. _____

Total Sum: _____

Percentage Score:

Total Sum: ____ ÷ 1.3 = ____

For manual calculations - determine the average score (sum of 3 scores above and divide by 3).

Example: Your total scores are 75% (Money/Mindset), 80% (Marketing), 70% (Sales). $(75 + 80 + 70) \div 3 = 75\%$

Your Total Score: _____

Average Cardone Client Score: 92.4%.