

Name: _____ version 4.0a
E-mail: _____
Company: _____
Phone: _____ ext. _____ Fax: _____
Address: _____
City: _____ State: _____ Zip: _____

- 1. WOW Income: \$ _____ 2. Minimum: \$ _____
3. Current number of hours worked per week: ___/wk Goal: ___/wk
4. Sales Closing Ratio: _____ % 5. Final Closing Ratio: _____ %
6. Biggest Challenge: (Getting to WOW income and working minimal hours)

6b: Which shape do you like? (rate 1st - 4th) a.square b.triangle c.Squiggly line d.circle
SEM-POB.DRW Copyright © 2001 Synergy Solutions, Inc. (630) 393-9909 6c: Your birth order: _____ aw-c02

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7. Please rate your effectiveness in dealing with the following: 1 to 10 with 10 being the best.

In the first ___ please rate where you are currently, in the [___] please rate where you would like to be.

- a. Ability to generate business from other professionals or corporate referral sources.
 - b. Gain repeat business, referrals from current clients, and profitability of current clients.
 - c. Ability to generate a large number of qualified leads and convert them to clients.
 - d. Effectiveness, profitability, and consistency of in-person sales contacts.
 - e. Degree to which your business has grown as a result of phone contact with clients and prospects.
 - f. Consistency of relationship marketing efforts to retain clients, generate new prospects.
- Total a through f.** [54+:Great] [48-53:Good] [42-47:Below Potential] [Less than 42:Far Below Potential]

- g. Stress, -j. Life Balance, -m. Time management
- h. Follow-through, -k. Personal time, -n. Marriage,
- i. Spiritual life, -l. Consistency, -o. Networking

p. Past Income: ___:___, 2002:___, 2001:___, 2000:___

q. Number of past clients for whom you have contact data:___ Database used:___

r. Would you like input, suggestions, or ideas on any of the above? []-Yes, []-No

Please rate in order from 1 to 4 (with 1 being the most frustrating) which of the following would cause you the most frustration:
___ A. Things not being accurate or done correctly. ___ B. Things being out of control.
___ C. Things not being fun or exciting. ___ D. Conflict with others.

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