



▶ **Directions:** Read through the following statements. On a scale of 1 to 5 (5 being the highest), rank your level of agreement with the statement.

A. Time Management Level of Agreement

- 1. I am satisfied with how I spend 80% of my business day. _____
- 2. I never feel I over commit myself. _____
- 3. I usually tackle the A-1 most important tasks first and delegate or delay B & C level priorities as much as possible. _____
- 4. I have a structured weekly routine that sets aside uninterrupted time to handle priority tasks. _____
- 5. I have structured weekly routines that allow ample time for my in-person appointments. _____
- 6. I have time set aside daily for planning. _____
- 7. I have a structured weekly routine that sets aside time for marketing and business development activities. _____
- 8. I never have to work later or on the weekends to make up for time lost to distractions or interruptions. _____
- 9. I know that to succeed and create profitability, I can't do all of the work myself, so I practice delegation. _____
- 10. I routinely assign tasks with very clear definition of what is to be done. _____

Total _____

B. Prospecting/Client Development

- 1. I feel I have control over whether or not my business grows. _____
- 2. I enjoy thinking of new ways to promote my business. _____
- 3. I have identified the ideal type of clients for the work I do. _____
- 4. I can easily compile a list of past clients who could become referral sources. _____
- 5. I have prepared scripts for myself and my assistant to comfortably handle any and all inquiries from prospective clients. _____
- 6. I routinely acknowledge and thank my clients, customers or influences who refer a matter to me. _____
- 7. I have an arsenal of stories I tell that demonstrate the kind of work I do, the kind of people I help, and why. _____
- 8. I have compiled a list of my top twenty influences that I use as a guide in my marketing efforts. _____
- 9. I have identified the distinction between A & B clients vs. C & D ones. _____
- 10. I am comfortable asking for referrals. _____

Total _____

C. Vision

- 1. I have a clear understanding of what "having a vision" for my life is. _____
- 2. I have a clear 1, 3, and 10-year vision. _____
- 3. I know where I will be personally, professionally, physically and financially. _____
- 4. I regularly review my vision to see how my current life measures up. _____
- 5. I am currently living my vision. _____

Total _____

D. Organization

- 1. I feel and stay organized on a daily basis. _____
- 2. All of my paperwork is filed and all files are put away. _____
- 3. I have systems and processes for each activity that is performed daily/weekly/monthly. _____
- 4. I can easily access my paperwork and computer files. _____

Total _____

E. Goal Setting

- 1. I have an effective, written goal-setting system I implement at the beginning of each year. _____
- 2. My goals are always SMART (Specific, Measurable, Action, Reachable, Timed). _____
- 3. I keep a list of my goals and needed action steps in front of me at all times while I'm working. _____
- 4. I track my goals weekly/monthly and know what I need to do in order to achieve them. _____
- 5. I achieve 80% of my goals annually. _____

Total _____

F. Client Services

- 1. I regularly deliver "wow" client service and am clear what it entails. _____
- 2. I always exceed my clients' expectations. _____
- 3. I am in the habit of under promising and over delivery. _____
- 4. I provide value for my clients. _____
- 5. My past clients return to me for their current real estate needs. _____

Total _____



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G. Specialization

- 1. I have a clearly defined area I specialize in and have all the tools I need to excel in it. _____
- 2. I have a written definition of my ideal client. _____
- 3. I am recognized in the marketplace for my specialty. _____
- 4. I regularly receive referrals based on my specialty. _____
- 5. I perform my specialty with excellence and continue to develop and grow within my specialty. _____

Total _____

H. Qualifying Prospects

- 1. I have a clearly-defined and written ideal client profile. _____
- 2. I am not desperate for clients and therefore don't show up appearing "needy". _____
- 3. I have a written series of qualifying questions I ask each perspective client in order to determine the feasibility of delivering "wow" client service. _____
- 4. I am willing to turn business away if I determine I cannot be successful in delivering the desired outcome. _____
- 5. I am willing to turn business away if I need to expend too much effort for the desired outcome. _____

Total _____

I. Closing

- 1. My closing ratio is 75% or better. _____
- 2. I have a written closing process and track it through the transaction so nothing slips through the cracks. _____
- 3. I rarely blame external factors for my lack of closings. _____
- 4. I work only with clients who have the ability to close. _____
- 5. I still get a "thrill" from the close. _____

Total _____

J. Keeping The Pipeline Full

- 1. My pipeline is always full. _____
- 2. My pipeline doesn't cycle between full and then empty throughout the year. _____
- 3. The action steps I take to keep my pipeline full produce results rather than spin my wheels. _____
- 4. I have identified what action steps are needed to keep my pipeline full. _____
- 5. I regularly complete the action steps needed to keep my pipeline full. _____

Total _____

K. Finances

- 1. My checkbook is balanced and current. _____
- 2. I know how much income I need to earn in order to live my desired lifestyle. _____
- 3. I have identified all my personal and professional expenses as well as savings through the end of the year. _____
- 4. I regularly earn the income I require. _____
- 5. I do not have any outstanding receivables. _____

Total _____

L. Balanced Life

- 1. I am currently satisfied with my balance between rest, work, and play. _____
- 2. I have hobbies I enjoy and the time to cultivate them. _____
- 3. I get enough sleep, eat properly and exercise regularly. _____
- 4. I leave my pager, cell phone, and email off on evenings and weekends. _____
- 5. I regularly spend enough time with my family and friends. _____

Total _____

To Score the Test: Total the scores you received in each category. Place the total for each category in the spaces provided below.

Category	Your Score	Category	Your Score
A. Time Management		G. Specialization	
B. Prospecting/Client Development		H. Qualifying Prospects	
C. Vision		I. Closing	
D. Organization		J. Keeping the Pipeline Full	
E. Goal Setting		K. Finances	
F. Client Services		L. Balanced Life	
		Grand Total	



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