

Roadmap to Better Clients

Self-Assessment



Based on where you are today, score each statement below using the following scale:

- 3** = Most of the time
- 2** = Sometimes
- 1** = Rarely

- _____ Your prospects tend to shop around for the lowest price
- _____ It's difficult for you to clearly articulate or describe your ideal client
- _____ It seems like everyone could be a good prospect for you
- _____ You often lose projects because the prospect/client says that your price was too high
- _____ You feel like most clients don't truly value and respect your work and expertise

.....

_____ **Total score for this stage**



Based on where you are today, score each statement below using the following scale:

- 3** = Most of the time
- 2** = Sometimes
- 1** = Rarely

- _____ You're constantly struggling with self-doubt and uncertainty in your business
- _____ You're not sure why some of your peers command much higher fees than you do
- _____ You often have to take on less-than-ideal clients because you need the work
- _____ You're afraid to raise your fees because you could lose clients and new opportunities
- _____ It feels like you're working in an environment that's not fair to freelancers

.....

_____ **Total score for this stage**



Based on where you are today, score each statement below using the following scale:

- 3** = Most of the time
- 2** = Sometimes
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- _____ You're constantly struggling through the feast-or-famine cycle
- _____ You're almost completely dependent on word of mouth, referrals and incoming leads
- _____ You're terrified to contact prospects who've never heard of you
- _____ The only time you prospect for clients is when you're out (or almost out) of work
- _____ You have been freelancing for less than three years

.....

_____ **Total score for this stage**



Based on where you are today, indicate if you agree or disagree with the statements below. Use the following scale:

- 3** = Strongly agree
- 2** = Hard to say
- 1** = Strongly disagree

- _____ Most of your work comes from outbound prospecting activities
- _____ You don't publish your own newsletter or blog (or you don't publish regularly)
- _____ You don't have a mailing list
- _____ You don't have a low-cost "entry level" service prospects can buy to try you out
- _____ You've been freelancing for at least one year

.....

_____ **Total score for this stage**



Based on where you are today, score each statement below using the following scale:

3 = Most of the time

2 = Sometimes

1 = Rarely

_____ You're not sure how to handle prospect conversations (what to ask, what to say)

_____ Pricing and/or quoting your work is often stressful

_____ You don't always see red flags when you first talk/correspond with a prospect

_____ You're not sure how (or how often) to follow up on your quote/proposal

_____ You get a lot of "no's" (or no response) from prospects after you send them a quote

.....
_____ **Total score for this stage**



Based on where you are today, score each statement below using the following scale:

3 = Most of the time

2 = Sometimes

1 = Rarely

_____ Prospects who say they'll keep your information handy rarely contact you again

_____ Most of your clients hire you for one project only

_____ You're booked solid but are burned out and/or still not hitting your income goals

_____ You don't typically have client retainer agreements or recurring work

_____ You generate income only when you're working

.....
_____ **Total score for this stage**

Interpreting Your Score

Which stage had the **highest** score? _____

This is the stage on which you want to focus first. In the case of a tie, start with the stage that is closest to Stage One.

For example:

- If Stage Two and Stage Three are tied for the highest score, start with Stage Two.
- If Stage Four and Stage Six are tied for the highest score, start with Stage Four.

It's common to have an equal amount of challenges in two or more stages. However, don't work on more than one stage at once. This will dilute your efforts and impede your progress. Instead, focus on one stage at a time. Implement the execution plans inside that stage, and don't move to the next stage until you start seeing improvement.

Once you start seeing progress, move on to the next highest-scoring stage. Again, in the case of a tie, pick the stage that had the highest score **and** is closest to Stage One.

Let's look at some sample results:

Stage One: 6
Stage Two: 9
Stage Three: 10
Stage Four: 10
Stage Five: 6
Stage Six: 11

In this scenario, you want to proceed as follows:

- Start with Stage Six because that's the stage with your highest score
- Move to Stage Three (because it's closer to Stage One)
- Proceed to Stage Four, Stage Two and Stage One, in that order
- Finally, move to Stage Five

Your Action Plan

Use your scores above to map out your plan of action:

The stage I'll focus on first: _____

The stage I'll focus on second: _____

The stage I'll focus on third: _____

The stage I'll focus on fourth: _____

The stage I'll focus on fifth: _____

The stage I'll focus on sixth: _____

Developing Mastery

Once you've made progress in all stages, *retake this assessment* and see how you score. Repeat this process and go through any new execution plans and other resources that have been published since your first wave of study and implementation.

At a minimum, take this assessment every year to see where you're making progress and where you might need to develop a greater level of mastery.