

Are You Ready for Your Briefing Center Moment of Truth?

Discussion Leader Self-Assessment

To be a more effective discussion leader, it's useful to examine your current skills. This self-assessment can help determine areas you'll want to focus on to increase your confidence and competence. Read each statement and put a check in the numbered box that best describes your current practices.

	Always				Never
	5	4	3	2	1
Do I help the customer UNDERSTAND?					
I thoroughly research the customer's world so I can plan a message that's customer-centric.					
I take the time to plan a compelling opening and agenda targeting the customer's needs, and I validate the customer's priorities and this agenda before proceeding with the briefing.					
I customize my presentation based on the account team's objectives for the topic.					
I avoid jargon and acronyms, and use language the customer understands.					
I choose or prepare the most impactful visuals to set the stage for a productive session.					
I use a whiteboard or flipchart to explain a point or collaborate with the customer when appropriate.					
Total Score	+	+	+	+	=

- If you scored between 24 and 30:** Congratulations! You have done your homework, and the customer will notice.
- If you scored between 18 and 23:** You are on the right path; spend a bit more time to focus your message on the customer needs.
- If you scored between 6 and 17:** Revise your presentation to make sure the customer recognizes your awareness of their world.

Assessment continued on reverse of page

	Always				Never
	5	4	3	2	1
I focus on relevant benefits and quantifiable impact for each customer.					
I help the customer see the unique differentiation that my solution will provide.					
I identify specific benefits for the individuals attending the briefing.					
I provide industry level perspectives and insights to support my message.					
I plan and pose thought-provoking, open-ended questions to more deeply understand customer needs, opportunities, and perspectives.					
I use examples, analogies, customer success stories, and proof points to make my message interesting and memorable to the customer.					
Total Score	+	+	+	+	=

- If you scored between 24 and 30:** You are providing value that is clearly defined for your customer. Good work!
- If you scored between 18 and 23:** Look for one or two more opportunities to interject a link to specific customer value.
- If you scored between 6 and 17:** Your presentation may be too product or service focused; re-think your message with an eye to customer value.

	Always				Never
	5	4	3	2	1
I create an environment where customers are comfortable engaging in open dialog.					
I try to be my real self – displaying a genuine and authentic presence – professional, confident and credible.					
I am flexible in the moment if the customer wants to go a different direction.					
I engage conversationally to make personal connections with each individual in the briefing.					
I anticipate questions from the customer and prepare and practice potential responses in advance of the briefing.					
I avoid a defensive response when challenged with tough questions.					
Total Score	+	+	+	+	=

- If you scored between 24 and 30:** You are demonstrating behaviors that encourage trust & strengthen relationships.
- If you scored between 18 and 23:** Keep working on the skills that will help you engage in dialog with your customer.
- If you scored between 6 and 17:** You may be doing more talking than is necessary. Let the customer talk, too!