



TELL ME HOW I CAN HELP!

* I will review this information with care to provide my initial impression. My full candor is an important part of getting to the heart of an issue and I have never been unsuccessful in helping a client.

Your Name & Title: _____

Organization name: _____

Organization address: _____

Best phone number to reach you: _____

E-mail address: _____

Website: _____

note: All content is confidential and I never share contact information.

I have a number of questions to launch this assessment. Answer those that are most relevant. I offer a free 1 hour consultation to further assess your needs. Use additional space if needed.

DETAILS ABOUT PRESENT COMMUNICATION

Problems? _____

Challenges? _____

Breakthroughs? _____

What separates your high-performers from others? _____

How long have these issues been present? _____

What do you see as happening if they are not addressed:

Short term? _____

Long Term? _____

TELL ME ABOUT YOUR INDUSTRY / PROFESSION

Strengths? _____

Problems or Challenges? _____

Breakthroughs _____

Who is your typical customer? _____



TELL ME ABOUT YOUR ORGANIZATION

Strengths? _____

Problems or Challenges? _____

Breakthroughs? _____

Significant events? Mergers? Relocations? _____

What is your organization's competitive edge? _____

DESCRIBE THE ORGANIZATIONAL CULTURE

Strengths? _____

Problems or Challenges? _____

Breakthroughs? _____

BRIEFLY DESCRIBE:

Best part of your job? _____

Worst part of your job? _____

What do you think is in greatest need of change or remedy? _____

WITH REGARD TO LEADERSHIP, TEAMS AND COMMUNICATION:

What's happening that shouldn't? _____

What isn't happening that should? _____

Print and complete this form. Email a copy back to me as it will guide our next conversation. I'll be in touch with you in the coming days.

Lisa