

Skill Assessment

Your responses to this survey will be compiled with those of other agents from your company to create a report showing potential training and development needs. This report will then be used to provide the resources you need to become more productive.

Think about your current performance in the following areas. Rate yourself on a scale of 1 – 5 with 5 being high performance and 1 low. Then think about what your company expects regarding performance in those same areas. Use the same rating scale. Please make a candid assessment; all responses are anonymous. The survey should take about 10 minutes to complete.

How would you rate your performance in...	My					Company's					
	Current performance					Expected performance					
1. Following a recommended sales system.	1	2	3	4	5	1	2	3	4	5	NA
2. Initiating a relationship with a customer.	1	2	3	4	5	1	2	3	4	5	NA
3. Investigating customer's needs.	1	2	3	4	5	1	2	3	4	5	NA
4. Suggesting a course of action for the customer.	1	2	3	4	5	1	2	3	4	5	NA
5. Obtaining agreement and close.	1	2	3	4	5	1	2	3	4	5	NA
6. Explaining life insurance.	1	2	3	4	5	1	2	3	4	5	NA
7. Explaining annuities.	1	2	3	4	5	1	2	3	4	5	NA
8. Explaining disability income.	1	2	3	4	5	1	2	3	4	5	NA
9. Explaining long-term care.	1	2	3	4	5	1	2	3	4	5	NA
10. Explaining securities	1	2	3	4	5	1	2	3	4	5	NA
11. Explaining Medicare coverage	1	2	3	4	5	1	2	3	4	5	NA
12. Conducting financial planning.	1	2	3	4	5	1	2	3	4	5	NA
13. Conducting estate planning.	1	2	3	4	5	1	2	3	4	5	NA
14. Conducting retirement planning	1	2	3	4	5	1	2	3	4	5	NA
15. Explaining charitable giving.	1	2	3	4	5	1	2	3	4	5	NA
16. Explaining income planning.	1	2	3	4	5	1	2	3	4	5	NA
17. Explaining Medicaid	1	2	3	4	5	1	2	3	4	5	NA

planning.											
18. Explaining college funding.	1	2	3	4	5	1	2	3	4	5	NA
19. Explaining investments.	1	2	3	4	5	1	2	3	4	5	NA
20. Using the Internet.	1	2	3	4	5	1	2	3	4	5	NA
21. Using technology.	1	2	3	4	5	1	2	3	4	5	NA

Open-ended question. Please provide us with your comments, ideas, thoughts, etc. for the following question.

22. Please list any areas in which you would like to receive further training or education.

Other comments: