SCOOPTOOLS™

Sales DNA

A quick, personalised snapshot of your natural sales strengths and preferences.

Score each statement with what feels most true for you today. This will help us understand how you naturally approach sales relationships and opportunities.

We'll use your results as the starting point for a conversation, uncovering what's working well and where to best focus your energy.

NAME	BUSINESS	DATE

1 · The activities

For each activity give three quick 1-5 scores (1 = low, 5 = high) for -

- **A** - how Active you are
- **C** - how Comfortable or enjoyable it feels
- **I** – the Impact it's had
- **N/A –** if you've not done it lately

	A	C	I
NETWORKING			
Networking online, one-to-one (virtual coffee, exploratory call)			
Networking online, in a group (webinar, virtual interactive event)			
Networking in person, one-to-one			
Networking in person, in a group (colleagues and/or business acquaintances)			
SOCIAL			
Posting original content showcasing you and your expertise			
Posting original content talking about your business			
Engaging (liking, commenting, sharing) with content from your existing customers			
Engaging (liking, commenting, sharing) with content from potential new clients			
COLD OUTREACH			
Phone			
Direct email			
Online - connecting via social platforms (LinkedIn, shared communities, Slack, etc.)			
ASKING FOR WHAT YOU WANT			
Asking for a business introduction, via email			
Asking for a business introduction, in person			

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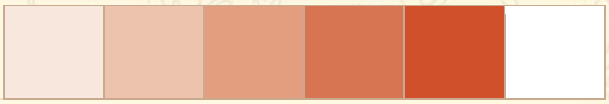
Asking for a referral or client feedback, via email			
Asking for a referral or client feedback, in person			
CLOSING			
Asking for the business or commitment, online			
Asking for the business or commitment, in person			

2 · Communication preferences

How much do you agree? 1 = strongly disagree, 5 = strongly agree.
Tick the level that fits, or NA if you're not sure.

	1	2	3	4	5	NA
I'm comfortable chatting about my business to strangers.						
I'm comfortable chatting about my business to friends and business acquaintances.						
I enjoy talking about my business in a formal setting (e.g. conference, boardroom).						
I enjoy talking about my business in a social setting (e.g. a café, or informal networking).						
I'm comfortable asking for a meeting, or an action to move an opportunity forward.						
I proactively follow up on meetings or actions to move opportunities forward.						
Verbal communication (phone / video call) is my preferred mode.						
I prefer written communication (email).						
I'd prefer to meet a potential client one-to-one.						
I prefer meeting new clients alongside a team member or business partner.						
I prefer engaging with new customers directly.						
I prefer to engage with new customers via a colleague or sales outsourcing.						
I enjoy serendipitous, unscheduled conversations about my business.						
I enjoy planned business meetings with a fixed agenda.						
I prefer not to contact someone again if they don't respond to my first message.						
I believe being persistent can have a negative impact.						

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I believe that if people are interested in what you offer, they'll come to you.	

3 · Sales process & strategy

Each question has its own 1–5 scale, shown in brackets. Tick the level that fits.

	1	2	3	4	5	NA
How often do you review your sales pipeline? (1 = rarely, 5 = weekly)						
How comfortable are you with your current pipeline and how you manage it? (1 = uncomfortable, 5 = very comfortable)						
How effective is your sales process at generating consistent sales? (1 = ineffective, 5 = highly effective)						
How much do you use technology or AI tools (e.g. a CRM, scheduling, AI assistants) to support your sales work? (1 = not at all, 5 = a lot)						

4 · Lead generation

Lead generation is how you find and attract new business - things like SEO (being found on Google), online ads, directory listings, email or content. Keep these in mind as you score below.

Each question has its own 1–5 scale, shown in brackets. Tick the level that fits.

	1	2	3	4	5	NA
How often do you do active lead-generation outreach? (1 = rarely, 5 = daily)						
How comfortable are you identifying and reaching out to new leads? (1 = uncomfortable, 5 = very comfortable)						
How successful have your lead-generation efforts been at securing new clients? (1 = unsuccessful, 5 = highly successful)						

That's it - thank you.

Thanks for taking the time to fill this in - it gives us a really useful picture of where you are with sales right now.

Book a free 20-minute Discovery call to chat through what it's telling us, and pick up a few things you can action straight away.

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