



# CONDUCTING A NEEDS ASSESSMENT

*How to deliver a high-value initial consultation*

- **Increase your close rate**
- **Diversify your revenue stream**
- **Win client trust & commitment**

Professional Organizers understand that conducting a needs assessment – as the first step to any client engagement – is an invaluable tool that can ensure the success of a project. Yet, the dilemma many face is whether to charge or not, how much advice to provide, and how to ensure client buy-in and commitment.

## WHAT'S THE SOLUTION?

*Conducting a Needs Assessment* will teach you the skills you need to walk into any new organizing project and map out a winning plan of action based on the client's unique needs.

Based upon Julie's New York Times bestseller "*Organizing from the Inside Out*", this methodical, proven process for delivering a high-value 2 hour initial consultation will provide a whole new revenue stream for your business. The payoff? The opportunity to assess each project, establish rapport, and determine your client's ability to succeed, while getting paid for it!

## WHO SHOULD ATTEND?

Professional Organizers (all levels) and those in related service fields who want to expand their service offerings to include billable needs assessments:

Executive/Personal Coaches, Moving Managers, Records Managers, Interior Designers, Real Estate Professionals, Closet Consultants/Designers, InHouse Corporate Trainers, Image Consultants, Architects, Administrative Assistants.

## WHAT IS THE PROGRAM?

*Conducting a Needs Assessment* is an instructor-led one-day workshop designed to develop your analytic, diagnostic and closing skills. The workshop provides focused study and practice of each stage of the needs assessment, from the first 5 minutes through the presentation and close. The workshop features a rich variety of highly interactive activities that build skill, reinforce your learning, and increase your retention.

- Small classroom settings provide high level of engagement and individual attention
- Lecture, exercises, role-playing, case studies, and video training provide many opportunities to practice new skills and get immediate feedback
- World-class faculty of experienced professional organizers boasting 30+ years of combined field experience.
- Dynamic Modules include:
  - o Profile of a Needs Assessor-What it takes to succeed
  - o Mastering the 4 High-Value Deliverables
  - o The Structure and Timing of a Needs Assessment
  - o Pinpointing the Issues through Probing Questions
  - o Conducting the Look-See Tour
  - o Breaking down the Project
  - o Presenting the Plan & Closing the Deal
- Field Exercise: Needs Assessment Practice with Client
- Follow up group coaching call and review of Field Experience

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ORGANIZING INSTITUTE

## WHAT WILL YOU LEARN?

*Conducting A Needs Assessment* teaches proven “Inside Out” strategies for conducting an initial client assessment. And it’s a completely different skill set than hands-on organizing!

JM Organizing Institute’s unique workshop trains you in the consultative mindset that allows you to understand the client situation, focus on the high-level deliverables, and gain client buy-in and commitment for the hands on work. You’ll learn to:

- Overcome client resistance and establish instant rapport
- Diagnose the true cause of disorganization so you prescribe the right solution
- Design a logical plan of action, breaking down projects into do-able steps
- Accurately estimate the time required to complete any project
- Ask probing questions to get to the heart of the issue
- Assess client’s ability to succeed and anticipate obstacles
- Pace the consultation to avoid overwhelming the client
- Set realistic expectations
- Generate a concise, professional report
- Handle difficult clients
- Avoid the most common mistakes made in Needs Assessments—which prevent the sale

## Workshop Dates, Agenda & Registration

For dates, locations, full day agenda and to register, please visit our website:

[http://www.juliemorgenstern.com/Organizing\\_institute.php](http://www.juliemorgenstern.com/Organizing_institute.php)

or call us @ 212.586.8084

## After attending the program, participants report the following:

- 94% felt the program effectively conveyed the concepts and skills
- 96% found the program “valuable” or “very valuable” on the job
- 95% would recommend the seminar to colleagues

## PROGRAM RESULTS

“The training was excellent and comprehensive. It was so beneficial because it provided the how-to’s, practical, hands-on training and immediate feedback to learn most effectively”  
*Denise K., Connecticut*

“Julie’s professional training gave me the aha that you get when you read a book for the 2nd, 3rd, or 4th time! She brought Organizing From the Inside Out to life for me. Sharing from her rich experiences Julie illustrated and reinforced the value of the initial assessment. I will not do a hands-on organizing project without doing an assessment ever again!”  
*Linda O., California*

## One day Workshop Includes:

- Participant Workbook
- Job Aid & Tools
- First-rate JME Certified Facilitator

## Workshop Investment

\$ 795 - (including follow-up 90-minute phone coaching Session)

FOR MORE INFORMATION CONTACT:

212-586-8084

[WWW.JULIEMORGENSTERN.COM](http://WWW.JULIEMORGENSTERN.COM)



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