

SELF-ASSESSMENT WORKSHEET

M1: Profile Matching | Active Offer Career Program

This self-assessment will help you identify your optimal company profile match based on your current situation, goals, and constraints. Answer each question honestly—there are no "right" answers, only honest self-reflection that will guide you to the company types where you're most likely to succeed and be satisfied.

QUESTION 1: SaaS Sales Experience

How many years of SaaS sales experience do you have?

- 0-1 years (Career switcher or new to SaaS) = 1 point
- 1-3 years (Building foundational skills) = 2 points
- 3-7 years (Experienced mid-career professional) = 3 points
- 7+ years (Senior/veteran sales professional) = 4 points

Your Score: _____

QUESTION 2: Financial Obligations

What is your current financial situation?

- Significant obligations (mortgage, dependents, debt) requiring stable income = 1 point
- Moderate obligations (rent, some savings, manageable expenses) = 2 points
- Minimal obligations (low expenses, single, no major financial commitments) = 3 points
- Financially independent (significant savings, no obligations) = 4 points

Your Score: _____

QUESTION 3: Financial Runway

How many months of expenses do you have saved?

- Less than 3 months (immediate income needs) = 1 point
- 3-6 months (some cushion) = 2 points
- 6-12 months (comfortable cushion) = 3 points
- 12-18+ months (significant financial runway) = 4 points

Your Score: _____

QUESTION 4: Primary Career Goal

What is your top priority right now?

- Maximize current cash earnings and income stability = 1 point
- Build enterprise sales skills and resume credibility = 2 points
- Balance current income with equity upside potential = 3 points
- Pursue maximum equity upside and wealth creation = 4 points

Your Score: _____

QUESTION 5: Work Environment Preference

Which work environment helps you perform best?

- Highly structured (clear processes, training, mentorship, defined roles) = 1 point
- Moderately structured (some process, growing organization) = 2 points
- Flexible/evolving (adapting processes, self-direction required) = 3 points
- High autonomy (ambiguity, wearing multiple hats, defining your own role) = 4 points

Your Score: _____

QUESTION 6: Learning Style

How do you learn and develop skills most effectively?

- Structured training programs and proven methodologies = 1 point
- Combination of training and hands-on experience = 2 points
- Hands-on experience with some mentorship = 3 points
- Trial-and-error, rapid iteration, figuring it out myself = 4 points

Your Score: _____

QUESTION 7: Risk Tolerance

How comfortable are you with career and income uncertainty?

- Very low tolerance (need predictable income, avoid uncertainty) = 1 point
- Low-moderate tolerance (some risk acceptable with safeguards) = 2 points
- Moderate-high tolerance (can handle uncertainty for upside) = 3 points
- High tolerance (embrace risk for potential big outcomes) = 4 points

Your Score: _____

QUESTION 8: Work-Life Balance Priority

How important is work-life balance to you right now?

- Critical (family, health, personal commitments require boundaries) = 1 point
- Important (prefer 40-50 hour weeks, reasonable travel) = 2 points
- Somewhat important (willing to work 50-60 hours for growth) = 3 points

■ Not a priority (willing to work 60-70+ hours for career advancement) = 4 points

Your Score: _____

SCORING YOUR ASSESSMENT

Add up your total points from all 8 questions:

TOTAL SCORE: _____ / 32

INTERPRETING YOUR SCORE

Score Range	Recommended Profile	Why This Match
8-14 points	ENTERPRISE LEADERS	You prioritize income stability, structured environment, work-life balance, and predictability.
15-21 points	GROWTH CHAMPIONS	You have some experience, moderate financial cushion, and want to balance current income with future growth.
22-28 points	GROWTH CHAMPIONS (Aggressive)	You have experience, financial runway, high risk tolerance, and strong equity focus. You are willing to take risks for potential high returns.
29-32 points	VENTURE-BACKED STARTUPS	You have significant financial runway, high risk tolerance, thrive in ambiguity, and prioritize high-growth opportunities.

NEXT STEPS

Based on your recommended profile match, proceed to the company list examples in the module that align with your profile. Use the Target Company List Template (Excel) to build your personalized list of 20-30 target companies. Then use the Company Evaluation Scorecard to systematically evaluate and compare your top candidates before beginning your targeted outreach strategy.

Important Note: This assessment is a guide, not a rule. Your situation is unique, and you may choose to target a different profile based on specific opportunities, personal circumstances, or strategic career considerations. Use this as a starting point for informed decision-making.