

A self-assessment is a structured set of questions designed to allow the user to evaluate aspects of themselves including their relative strengths and weaknesses.

A well-designed assessment combined with timely, personalized feedback can catalyze valuable self-reflection and prime a meaningful conversation. Furthermore, online assessments are very convenient. On the other hand, the provision of timely, personalized feedback can be very time-consuming and, consequently, prohibitively expensive.

However, no-code automation tools enable you to provide personalized feedback nearly instantaneously.

For example, Tom McMakin and Doug Fletcher are the authors of *How Clients Buy*. The premise of their book is that before someone will buy a professional service from you, your prospective customer must perceive sufficient levels of seven elements. These seven elements can be used as a diagnostic tool to assess your relative strengths and weaknesses.

We worked with Tom and Doug to translate the self-assessment they had prepared for *How Clients Buy* into an online form. We used Typeform, which we embedded in a dedicated WordPress website. The assessment consists of a series of Likert scale questions and culminates with questions about the user's contact information.

Submissions are stored in Airtable using the native Typeform integration. Airtable also calculated category scores across the seven elements.

The creation of a new record in Airtable triggers this "Zap". The first action in the Zapier automation is to create a Bar Chart using an application called Image-Charts. Then, the bar chart is incorporated into an email that is automatically sent to the user.

Feedback can be made even more elaborate. In this case, scores from a self-assessment were used to compose a highly personalized feedback document.

Once you set up your automated self-assessment, the marginal cost of adding value to your users is nearly zero. That makes it easy to share it freely.

Want to learn more? Let's chat.

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