

Complete MSP Program Manager Self-Assessment

*Assess yourself across the four areas of the complete PM role.
Evaluate each area through Knowledge, Skills, Behaviors, and Experience.*

01

BUSINESS
MANAGEMENT

02

INTERNAL
BUSINESS PROCESS

03

CUSTOMER & BUSINESS
RELATIONSHIP MGMT

04

LEARNING
AND GROWTH

K

Knowledge
What you know

S

Skills
What you can do

B

Behaviors
What you consistently do

E

Experience
What you have navigated

HOW TO USE THIS ASSESSMENT

Rate each statement 1–5 based on how true it is right now — not how you want it to be.

1 = Rarely or not yet · 2 = Sometimes · 3 = Often, still developing · 4 = Usually · 5 = Consistently

Each question is labeled K / S / B / E. Patterns across a single dimension reveal where the gap lives.

Total each area for your score out of 25. Transfer all four scores to the Summary on page 4.

Complete the reflection line for each area. That answer connects directly to the development work.

MATURITY LEVELS — Initial · Defined · Optimized

Initial

5–11 points

Awareness exists; consistent application has not yet developed across the four dimensions of this area.

Defined

12–18 points

You apply this area with increasing consistency, but gaps remain in one or more of Knowledge, Skills, Behaviors, or Experience.

Optimized

19–25 points

This is a developed capability. You apply it consistently across accounts and situations, and across all four dimensions.

The four areas develop together — real situations pull on all of them at once.

Your lowest score shows where you have the least to draw from when that happens.

AREA 01

BUSINESS MANAGEMENT

MY SCORE

 / 25

Understanding the client's business well enough to connect delivery outcomes to what matters to them — and speaking the language of the person buying, not only managing, your service.

DIMENSION · 1 = Rarely or not yet 5 = Consistently

1 2 3 4 5

- 1 **KNOWLEDGE** — I can describe my client's business strategy, key priorities this year, and the outcomes they need from IT — without referring to notes. 1 2 3 4 5
- 2 **SKILLS** — When presenting service results, I translate operational metrics into the business language my client's leadership actually uses. 1 2 3 4 5
- 3 **BEHAVIORS** — I bring business-relevant observations into client conversations proactively, before my client raises them. 1 2 3 4 5
- 4 **EXPERIENCE** — I can point to a situation where understanding the client's business prevented a delivery problem or protected a relationship. 1 2 3 4 5
- 5 **KNOWLEDGE** — I understand what success looks like to my client's CFO or business leader — not only their IT Director. 1 2 3 4 5

REFLECTION — WHERE IS THE GAP IN THIS AREA?

AREA 02

INTERNAL BUSINESS PROCESS

MY SCORE

 / 25

Managing relationships inside your own organization, getting resources and alignment without formal authority, and operating effectively across functions that don't report to you.

DIMENSION · 1 = Rarely or not yet 5 = Consistently

1 2 3 4 5

- 1 **KNOWLEDGE** — I understand how decisions are made internally for resources, prioritization, and escalation — and I work within that process rather than around it. 1 2 3 4 5
- 2 **SKILLS** — I can secure resources, support, or alignment from teams that don't report to me without escalating to my manager. 1 2 3 4 5
- 3 **BEHAVIORS** — When I need something from another department, I frame the request around their priorities, not mine. 1 2 3 4 5
- 4 **EXPERIENCE** — I can describe a specific situation where I navigated cross-functional alignment across multiple internal teams and produced a successful outcome. 1 2 3 4 5
- 5 **BEHAVIORS** — I can name the key internal stakeholders for each of my accounts and describe what each of them needs from me right now. 1 2 3 4 5

REFLECTION — WHERE IS THE GAP IN THIS AREA?

AREA 03

CUSTOMER AND BUSINESS RELATIONSHIP MANAGEMENT

MY SCORE

 / 25

Delivering what was promised, managing the relationship before it becomes a problem, and building the kind of trust that produces renewals and expansions without a sales call.

DIMENSION · 1 = Rarely or not yet 5 = Consistently

1 2 3 4 5

- | | | | | | | | |
|---|-------------------|---|---|---|---|---|---|
| 1 | KNOWLEDGE | I know which of my accounts are at renewal risk right now, based on operational and relationship signals — not just contract dates. | 1 | 2 | 3 | 4 | 5 |
| 2 | SKILLS | I can articulate the specific gap between what was promised to a customer and what they are currently experiencing. | 1 | 2 | 3 | 4 | 5 |
| 3 | BEHAVIORS | I communicate potential problems to customers proactively, before they hear about them from their own teams. | 1 | 2 | 3 | 4 | 5 |
| 4 | EXPERIENCE | I can describe a situation where my relationship management prevented an escalation or protected a renewal that was at risk. | 1 | 2 | 3 | 4 | 5 |
| 5 | BEHAVIORS | My customers experience me as someone who manages the relationship, not just fulfills the contract. | 1 | 2 | 3 | 4 | 5 |

REFLECTION — WHERE IS THE GAP IN THIS AREA?

AREA 04

LEARNING AND GROWTH

MY SCORE

 / 25

Building the leadership capability that makes the next role possible — deliberately, not accidentally. Influence, communication, executive visibility, and structured self-development.

DIMENSION · 1 = Rarely or not yet 5 = Consistently

1 2 3 4 5

- | | | | | | | | |
|---|-------------------|---|---|---|---|---|---|
| 1 | KNOWLEDGE | I can articulate the specific difference between what I do well today and what the next level of this role actually requires. | 1 | 2 | 3 | 4 | 5 |
| 2 | SKILLS | I have a structured approach to developing capability gaps — not just waiting for experience to accumulate over time. | 1 | 2 | 3 | 4 | 5 |
| 3 | BEHAVIORS | I regularly seek feedback from clients, peers, or leadership and adjust my approach based on what I hear. | 1 | 2 | 3 | 4 | 5 |
| 4 | EXPERIENCE | I can name a specific leadership or business capability I developed deliberately in the last 12 months and describe how I built it. | 1 | 2 | 3 | 4 | 5 |
| 5 | BEHAVIORS | My development activities include the business and leadership dimensions of the PM role — not only operational or technical skills. | 1 | 2 | 3 | 4 | 5 |

REFLECTION — WHERE IS THE GAP IN THIS AREA?

YOUR RESULTS

Score Summary

Transfer your area scores from pages 2–3. Each area is out of 25. Total score is out of 100.

BUSINESS MANAGEMENT ____ / 25	INTERNAL BUSINESS PROCESS ____ / 25	CUSTOMER & BUSINESS REL. MANAGEMENT ____ / 25	LEARNING AND GROWTH ____ / 25
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TOTAL SCORE: _____ / 100

Add all four area scores

WHAT YOUR SCORES MEAN

Area Score	Maturity Level	What It Means for This Area
5–11	Initial	Awareness exists; consistent application has not yet developed across the four dimensions of this area.
12–18	Defined	You apply this area with increasing consistency, but gaps remain in one or more of Knowledge, Skills, Behaviors, or Experience.
19–25	Optimized	This is a developed capability. You apply it consistently across accounts and situations, and across all four dimensions.

TOTAL SCORE MATURITY

- 20–44** — Initial — Significant development opportunity across multiple areas. The gap between current capability and next-level performance is wide.
- 45–72** — Defined — Capability is developing. Some areas are stronger than others; the gaps are visible and closable.
- 73–100** — Optimized — Strong overall. Maintain deliberately. The areas that remain below 19 are where the next chapter of development lives.

WHERE TO BEGIN

- Your lowest area score.** That is where you have the least to draw from when a real situation demands all four areas at once. Begin there.
- The reflection lines.** Return to the four reflection answers from pages 2–3. The pattern across those answers is your development agenda.
- The dimension, not only the area.** Notice which of K, S, B, E scores lowest across areas. A pattern there tells you more than the area total alone.

WHAT TO DO NEXT

- Read the book** — *The Job You Can't See* develops the complete mental model for all four areas. Each chapter shows where the gap usually lives.
- Book your 1:1 Next-Level MSP PM Earnings Accelerator Session** — 45 minutes.
calendly.com/bobroark/1-1-next-level-msp-pm-earnings-accelerator-session
- Start with the lowest score** — Take the reflection answer from your lowest area. Identify one real situation this week where you can apply it.