

Backsliding Predictor Checklist by Terry Prince, CPO-CD®

Use this when doing your assessment or prospect call. Any individual with one or more is a candidate for backsliding.

CONCERNS OR ONGOING ISSUES	Backsliding Predictor Does this person have:	Check if Yes
PHYSICAL HEALTH	Current or pending physical health concerns - pending surgery or treatment of a serious concern	
	Chronic physical health concerns	
	Family member with physical or chronic health issues	
MENTAL HEALTH	A history of depression, ongoing mental health issue or the start of treatment for a newly diagnosed mental health condition	
	A family member with mental health issues	
CARETAKING	A special needs family member	
	The care taking or day to day responsibility for elderly parents or aging relatives	
	A sick or ill pet(s) requiring complex caretaking	
LIFE TRANSITION	Moving from one distinct life stage to another	
	A change happening in their life (divorce, birth of a client, retirement pending)	
	Relocation from one geographic area to another	
EMPLOYMENT OR SKILL CHALLENGES	A new job or change in position/ responsibilities at work or at home	
	A recent job loss or a significant other residing in the household who has lost their job	
	A lack of good communications or delegation skills up to the tasks at hand	
BEREAVEMENT	Active (or expected) grieving of a recent or series of recent family, friend or pet losses	
	Loss of home or portion of home due to natural disaster or fire/flood	
OVERWHELM	A new baby or expecting to add members to their household within the next nine months	
	Three losses within the last five years (people, places, positions, possessions)	
	Three children or more under the age of 5 years of age	
	Relationship problems with loved ones or household members	
	Legal issue outstanding or in progress	
	Involvement in a major celebration such as a family wedding, big number anniversary or birthday party, or hosting a family reunion	
	Extensive seasonal activities planned and upcoming such as November/December holidays	
	A big work project upcoming or "busy season" in their job	
MOVE OR REMODEL	A remodel or major home improvement project in their home planned or in progress	
	A move planned, or in the process of moving	
FINANCIAL CHALLENGES	A big organizing project and little funding to complete the job	
	A serious concern about financially affording a professional organizer	
TIME CHALLENGES	Limited time to spend on the project or process due to travel, commitments or obligations	
	Irregular work or life schedule outside of their control	
Total Checked Yes		
<i>1 to 2 checked YES Backsliding to be expected.</i>		
<i>3 or more checked YES Backsliding inevitable!</i>		