

What It Is

A self-assessment of the quality of your relationship with key clients

What It Can Do

This tool can assist you to:

- Identify areas of relationship strength.
- Identify areas for relationship improvement.
- Facilitate shared understanding between yourself and your client as to the quality of the relationship.
- Identify areas for fruitful discussion with your client in order to improve the relationship.

The following indicators will help you to assess the current quality of any consulting or coaching relationship.

When consistently present, they indicate an ideal level of productive collaboration – what you would hope to see in all your client engagements.

When rarely or not at all present, these indicators are warning signs. Left unaddressed, they may become significant barriers to the effectiveness of your work, and may even threaten the relationship.

How It Works

This is a PDF form that can be filled out using Adobe Reader: <http://get.adobe.com/reader/> or Mac Preview.

Rate your responses to the statements in the assessment that follows using a scale of 1 to 7, with 1 representing 'Never' and 7 representing 'Always'.

CONSULTING/COACHING RELATIONSHIP ASSESSMENT

Rate your responses to the statements in the assessment that follows using a scale of 1 to 7, with 1 representing 'Never' and 7 representing 'Always'.¹

- 1) The client and I are clear about and closely aligned around the purpose, goals, priorities and process of our work together** (*versus having conflicting visions of what needs to happen and how to get it done*).

NEVER
1 2 3 4 5 6 ALWAYS
7

If the score is low, are you clear on what the differences are? How do you account for you and the client not being aligned? How might you be contributing to the lack of alignment?

- 2) The client is generally accessible, and readily prioritizes time to meet with me** (*versus being difficult to reach or schedule time with*).

NEVER
1 2 3 4 5 6 ALWAYS
7

If not, why do you think this is? Too many competing demands? Poor time management? Defensiveness or resistance? Lack of commitment or priority?

- 3) The client takes real ownership of issues raised in our work together. It's clear that the client is making good faith efforts to follow-up on their assignments between meetings** (*versus apparent lack of motivation or follow-through*).

NEVER
1 2 3 4 5 6 ALWAYS
7

If this score is low, what seems in the way of their taking ownership? Have you tried to address this, and what has been the result?

¹ This is a PDF form that can be filled using Adobe Reader or Mac Preview.

4) The client is willing to be vulnerable and express how they think and feel about their greatest challenges & needs *(versus being evasive or resistant to really opening up).*

NEVER 1 2 3 4 5 6 ALWAYS 7

If low on the scale, what are the specific behaviors that lead you to this assessment? Why might this be so? Are they generally someone who tends to be closed in all circumstances? Are you possibly holding too high a standard? Or might there be a lack of rapport or trust in you? Might there external constraining forces at play here?

5) I openly share my perspectives on the client's leadership and developmental needs *(versus my being self-censoring or withholding honest feedback).*

NEVER 1 2 3 4 5 6 ALWAYS 7

If not, what inhibits you from candidly offering your client feedback and input? Are you clear on the content you want to communicate? Do you doubt your client's commitment to their own development? Are you concerned that they will shut down or withdraw from the relationship? Have they rejected your previous attempts to give feedback? Are your own insecurities in any way at play here?

6) The client is receptive to and values my input and feedback *(versus being unresponsive, dismissive or defensive).*

NEVER 1 2 3 4 5 6 ALWAYS 7

If low, what is your theory on why the client is discounting your feedback? Are they secure enough to look at developmental feedback? Are you providing enough supporting data to help them understand the legitimacy of your view? Is there something about your delivery that might be off-putting?

7) I sincerely enjoy working with the client, and look forward to our interactions
(versus disliking the work or not looking forward to our interactions).

NEVER 1 2 3 4 5 6 ALWAYS 7

If low, what mindsets or behaviors of your client contribute to your not enjoying your time together? Do these same behaviors appear as a challenge for them in their working relationships? What in your own psychology might be interfering with your ability to form a successful coaching alliance?

8) I sincerely respect my client and feel compassion for the challenges they face
(versus feeling judgmental about their choices, actions and behaviors).

NEVER 1 2 3 4 5 6 ALWAYS 7

If low, how do you account for your lack of respect and compassion? What mindsets or behaviors in your client do you find aversive? Is there something familiar about the reactions you are having? Have you experienced having similar reactions in other relationships? What in you is getting triggered?

9) I feel fully engaged and present when we are together *(versus feeling distracted or bored).*

NEVER 1 2 3 4 5 6 ALWAYS 7

If low, what do you notice about your own energy? What is the client doing (or not doing) that seems related to your feeling disconnected? Do these same behaviors appear as a challenge for them in their working relationships? What in your own psychology might be leading you to disconnect? Is this an isolated experience for you, or are you have more general feelings of fatigue and disinterest in your work?

10) We work well together, and are able to resolve any differences that may arise between us.
(versus experiencing recurrent disagreements, frustrations or difficulty).

NEVER
1 2 3 4 5 6 ALWAYS
7

If low, what do you notice about the client that makes it challenging for them to negotiate differences of opinion and have challenging conversations? Do these same skill gaps show up in their relationships at work? Or is there something particular about your relationship that is at play here? What, if anything, might you be bringing to these interactions that makes them less than fruitful?

11) We regularly check in on our goals, our progress towards them, and evaluate the effectiveness of our work together *(versus assuming things are improving without any objective form of assessment).*

NEVER
1 2 3 4 5 6 ALWAYS
7

If low, what gets in the way of regularly checking the focus and efficacy of the coaching work? Are you taking responsibility for creating check-ins? Is the client resistant to such reflection and evaluation? Have you been reluctant, and if so, why?

12) The client comes away from our work feeling greater confidence in their own resources and capabilities *(versus becoming overly deferential or dependent).*

NEVER
1 2 3 4 5 6 ALWAYS
7

If low, does the client seem resistant to owning their own strength and autonomy? If so, do you have a sense of what this is about? Their hyper-active inner critic? Limiting beliefs? Cultural conditioning? Have you been utilizing a sufficiently strength-based, affirming approach? Is there anything you're doing (or not doing) that might be playing into their dependency?

13) The client is clearly appreciative of our work, and acknowledges the value of the investment involved (*versus being doubtful about the value being created or the costs involved*).

NEVER
1 2 3 4 5 6 ALWAYS
7

If low, is the client's assessment substantially different from your own? Do you share some of their doubts? Or, if you believe they are devaluing the value of what's being accomplished, why do you think this might be?

Scoring and Considerations

Based on this diagnostic:

- What's working well?

- Where might there be significant warning signs (if any)?

- What shifts might you want to make in your own mindset and attitudes?

- What shifts might you want to make in your own behavior?

- What requests or interventions might you want to make with your client?