



The Trusted Advisor Scorecard

Does your Trusted Advisor, Consultant, Facilitator or Guide have the capabilities to meet your organization's specific needs, both now and in the future? Rate each aspect from 1 – 10, with 10 being the best.

Definition of a "1"	1	2	3	4	5	6	7	8	9	10	Definition of a "10"
Jumps to a conclusion right away and provides a "canned" solution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Asks questions that help clarify the situation, problem or issue
Makes the discussion all about them and their product/service/ offering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understands the goals and priorities of our organization
Provides no objective measures and doesn't ensure we are satisfied with the outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Works with us to develop objective measures of success for each engagement and helps us achieve the ideal outcome
Is inconsistent and even divisive, depending on the audience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Trustworthy and able to build trust/rapport with others quickly
Has little experience, background or education in our area of need but talks a good game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Has significant experience, background, education in the area(s) we most need right now
Doesn't continue to grow and develop their capabilities to ensure they meet future needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Has significant experience, background, education in areas of future need for us
A one person show, with no real depth or capability beyond themselves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provides, or has the ability to provide, service at various levels of the organization simultaneously
Doesn't add anything we don't have in house except another opinion to consider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brings resources, talent, skills and experience we don't have available internally
Doesn't provide anything concrete in writing and invoices are always a surprise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provides written summaries of discussions, including actions, decisions, fees and next steps
Shares information with others that is obvious it's about us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintains the highest levels of confidentiality and professionalism at all times
Won't tell us what we need to hear, even if we don't want to hear it or tells in a way that is damaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gives recommendations, observations and collaboration even when the message being delivered is difficult for us to hear
Has a "one and done" approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Is committed ongoing, long term relationships with clients
ADD COLUMN TOTALS											YOUR SCORE _____/120

Comments:

