



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"/>	Asks questions that help clarify the situation, problem or issue									
Makes the discussion all about them and their product/service/ offering	<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"/>	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"/>	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"/>	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"/>	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"/>	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"/>	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"/>	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"/>	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"/>	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"/>	Is committed ongoing, long term relationships with clients									
ADD COLUMN TOTALS											YOUR SCORE _____/120

Comments:

