

MEASURING YOUR CONSULTANT[®]

DOES YOUR CONSULTANT HAVE GOOD JUDGMENT?

	<u>YES</u>	<u>NO</u>
✓ When I face tough choices, I often use my consultant as a sounding board. I share my dilemmas with me.	_____	_____
✓ The consultant is right more than 70 percent of the time in non-objective judgment.	_____	_____
✓ I have confidence my consultant makes judgments relatively quickly. He/She identifies and marshals the key facts and perspectives I need.	_____	_____
✓ If I ask my consultant to judge an issue where they may lack experience and important information, they're not afraid to come out and say they just don't know.	_____	_____
✓ He/She is honest about their track record at giving advice and making recommendations. They've made mistakes and learned from them.	_____	_____
✓ He/She is very aware of my tolerance for risk and loss and have discussed this openly with me.	_____	_____
✓ He/She has much better than average intuition.	_____	_____

ARE THEY BIG-PICTURE THINKERS?

YES

NO

✓ Before they start any assignment, they are very clear about the overall goals and purpose and have discussed these with me.

✓ He/She summarizes and crystallizes the key issues inherent in any given situation— and are vaguely uncomfortable until they lay these out in their own mind.

✓ They like to collect facts and analyze them, but what really motivates them is asking *why* and trying to understand what the facts mean.

✓ They develop a strong personal point of view about an issue, but they value and seek out other perspectives as they formulate that view.

✓ He/She often likes to sit down with me to “get my perspective” on an issue or situation of importance to me.

ARE THEY AN EFFECTIVE GENERALIST?

	<u>YES</u>	<u>NO</u>
√ I ask for advice and respect his/her judgment about issues that extend beyond core fundraising professional expertise.	_____	_____
√ He/She enjoys exploring subjects that have nothing to do with consulting and fundraising.	_____	_____
√ They find something interesting about everyone they meet and every situation they encounter.	_____	_____
√ He/She oftens notices things other people don't— details in a landscape, a particular fact from a presentation, a nuance of behavior.	_____	_____
√ Their job with the firm is an important source of learning for them, but it's only one of many. A lot of their knowledge acquisition comes from broad-based reading, study, discussion and debate with friends and family, pursuit of outside interests, and careful observation of successful individuals.	_____	_____
√ He/She has made changes in their professional focus— learning new specialties and innovative approaches.	_____	_____
√ They excel at their core specialty and constantly keep up-to-date in it.	_____	_____



DOES MY CONSULTANT PRACTICE SELFLESS INDEPENDENCE?

	<u>YES</u>	<u>NO</u>
√ He/She doesn't hold back their opinions— if they have a point of view on an issue of importance to me, they find a way to communicate it.	_____	_____
√ He/She knows where I will draw the line they're clear about the things I just won't do or put up with.	_____	_____
√ They have, on occasion, turned down assignments or terminated a client relationship.	_____	_____
√ He/She often surprises me with ideas and suggestions I didn't ask for.	_____	_____
√ They look at all of the current events around them through the lens of client engagements, trying to discern what the implications might be for our organization.	_____	_____
√ They ensure that my organization and I— and not them— take full public credit for victories, even if they had a key role in them.	_____	_____



HOW EMPATHETIC ARE THEY?

	<u>YES</u>	<u>NO</u>
√ They know what issues and concerns keep me awake at night.	_____	_____
√ They are rarely if ever surprised by my reaction to a particular person or situation.	_____	_____
√ He/She does twice as much listening as talking.	_____	_____
√ He/She understands how I like to communicate and have comfortably adapted to my style.	_____	_____
√ They know what my own hot buttons are: They are aware of the behaviors and situations that set me off, are able to identify them, and can regulate my responses.	_____	_____
√ They understand that I may mean something quite different from what I say. This doesn't surprise or bother them.	_____	_____
√ I enjoy spending time with them, and I routinely confide in them.	_____	_____
√ I am comfortable seeking regular feedback from him/her about my performance as a professional.	_____	_____

DO THEY HAVE CONVICTION?

	<u>YES</u>	<u>NO</u>
√ If I ask what's important to me, as an individual and as a professional fundraiser, their answers are immediate and clear. I know what their core beliefs and values are.	_____	_____
√ There are certain key experiences in their past that they refer to from time to time. They give me strength and inspiration.	_____	_____
√ He/She feels a sense of mission as they pursue their career, which is a passion rather than an obligation. Their financial compensation is important to them, but it doesn't drive their choice of work.	_____	_____
√ They are completely committed to the mission of my organization.	_____	_____
√ He/She communicates strongly and forcefully. They feel and project passion and energy when they talk.	_____	_____
√ When they speak, their message is unequivocal. If someone asks them a week or a month later about what they said, they can easily remember the key points.	_____	_____
√ If I, or the board, seem to have fixed, dogmatic views, they aren't dissuaded from trying to change our mind.	_____	_____

ARE THEY BIG-PICTURE THINKERS?

YES

NO

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|---|-------|-------|
| ✓ Before they start any assignment, you are very clear about the overall goals and purpose and have discussed these with me. | _____ | _____ |
| ✓ He/She summarizes and crystallizes the key issues inherent in any given situation— and are vaguely uncomfortable until you lay these out in their own mind. | _____ | _____ |
| ✓ They like to collect facts and analyze them, but what really motivates them is asking <i>why</i> and trying to understand what the facts mean. | _____ | _____ |
| ✓ They develop a strong personal point of view about an issue, but you value and seek out other perspectives as you formulate that view. | _____ | _____ |
| ✓ He/She often like to sit down with me to “get your perspective” on an issue or situation of importance to me. | _____ | _____ |

THEY HAVE DEVELOPED TRUST WITH ME AND THE ORGANIZATION

	<u>YES</u>	<u>NO</u>
√ Sometimes it is necessary to conduct assignments based on a minimum of documentation. Once they and I have agreed on the objectives and deliverables, trust them to follow through.	_____	_____
√ He/She is good about reminding me about something I'm supposed to do, and are willing to "check up" on me.	_____	_____
√ I have enough confidence in them, I am willing to ask them to tackle issues that are of major importance to me and the organization.	_____	_____
√ If on a rare occasion they slip up and miss a commitment, I am forgiving.	_____	_____
√ There is a quality of openness to our relationship. Both the consultant and I feel free to bring up touchy or awkward subjects with each other.	_____	_____
√ I have become familiar with their particular skills as well as their values and beliefs. I can predict how they will react to a particular situation or dilemma.	_____	_____
√ My trust in them extends beyond the belief that they will do good work; it is a deeper, broader trust based on both professional competence and personal integrity.	_____	_____

