

# Self-Assessment Inventory for Internal Consultants

**Directions:** Given the feedback you have received and your own self-knowledge, please complete the self-assessment inventory of your level of competence as an internal consultant.

1-Doing well; 2-Doing okay; 3-Needs improvement

Some behaviors and activities may be important to you but are not listed here. Write those on the blank lines at the end. When you have finished your assessment, go back over the list and choose three or four items that you would most like to improve. You may wish to take the assessment every six months to see how you are progressing and developing your skills.

## I. Have knowledge of theoretical constructs and framework used by internal consultants

### *Agreement/Contracting*

- Understanding the issue/need before saying yes \_\_\_\_\_
- Being clear about my competence and approach \_\_\_\_\_
- Checking out assumptions and expectations \_\_\_\_\_
- Negotiating differences for mutual satisfaction \_\_\_\_\_
- Negotiating and redefining role from past work with client as needed \_\_\_\_\_
- Seeking balance of ownership for project \_\_\_\_\_
- Explaining my theoretical foundation and biases if needed \_\_\_\_\_
- Knowing the client's wants and goals \_\_\_\_\_
- Determining how decisions will be made \_\_\_\_\_
- Accepting the client's limits and restrictions \_\_\_\_\_
- Saying no if the request is not strategic \_\_\_\_\_
- Clarifying issues with both primary and secondary clients \_\_\_\_\_
- Finding other resources to meet clients' needs \_\_\_\_\_
- Refusing projects when I don't have the competence \_\_\_\_\_
- Assessing relevance and fit with clients' needs \_\_\_\_\_
- Reviewing agreements regularly with clients \_\_\_\_\_
- Checking out clients' capacity to give attention to project \_\_\_\_\_
- Addressing conflicts with clients promptly \_\_\_\_\_
- Setting realistic goals and timelines for projects \_\_\_\_\_
- Seeking needed resources to support projects \_\_\_\_\_

*Analysis/Assessment*

- Having or acquiring the technical skills required \_\_\_\_\_
- Asking for resources to supplement my skills as needed \_\_\_\_\_
- Using a framework to analyze the data/information \_\_\_\_\_
- Identifying patterns and themes in the data/information \_\_\_\_\_
- Identifying underlying structures or causes of problems \_\_\_\_\_
- Using information-gathering techniques to involve the client system \_\_\_\_\_
- Summarizing information and analysis clearly and succinctly \_\_\_\_\_
- Gaining an independent view of issues \_\_\_\_\_
- Identifying organization problems and issues in early stages \_\_\_\_\_
- Collecting descriptive, neutral data/information to analyze problems before drawing conclusions \_\_\_\_\_

*Feedback*

- Preparing my client to hear difficult information \_\_\_\_\_
- Being aware of sensitivities and concerns in my client \_\_\_\_\_
- Surfacing and addressing resistance \_\_\_\_\_
- Using effective feedback skills \_\_\_\_\_
- Preparing for data-feedback presentation \_\_\_\_\_
- Using a practical vs. a conceptual approach \_\_\_\_\_
- Considering concerns of multiple clients in presentation \_\_\_\_\_
- Presenting data from clients' points of view \_\_\_\_\_
- Reminding clients of goals, outcomes, and desired future \_\_\_\_\_
- Acknowledging positives and strengths \_\_\_\_\_
- Using reframing to present opportunities \_\_\_\_\_
- Offering alternatives to address the problems \_\_\_\_\_
- Presenting the advantages/disadvantages or cost/benefits \_\_\_\_\_
- Being able to accept the clients' decision \_\_\_\_\_

*Alignment / Change Targets / Implementation*

- Clarifying clients' goals and outcomes \_\_\_\_\_
- Seeking alignment with clients' desired future \_\_\_\_\_
- Breaking down the project into small pieces \_\_\_\_\_
- Obtaining necessary support for the project \_\_\_\_\_
- Involving those affected \_\_\_\_\_
- Planning and managing projects \_\_\_\_\_
- Identifying systems and processes to change \_\_\_\_\_

*Alignment / Change Targets / Implementation*

- Transferring skills and knowledge to client system \_\_\_\_\_
- Possessing the knowledge base and skills required for the project \_\_\_\_\_
- Involving other functions/specialties as needed \_\_\_\_\_
- Using a variety of interventions \_\_\_\_\_
- Making formal presentations \_\_\_\_\_
- Facilitating groups at any level \_\_\_\_\_
- Understanding the dynamics of groups \_\_\_\_\_
- Being comfortable with ambiguity and unpredictable changes \_\_\_\_\_
- Communicating with all of the stakeholders \_\_\_\_\_
- Building/leading effective teams in person or virtually \_\_\_\_\_
- Helping others cope with change \_\_\_\_\_

*Evaluation*

- Providing alternative methods to evaluate \_\_\_\_\_
- Helping clients see quantitative and qualitative results \_\_\_\_\_
- Seeking client participation in evaluation \_\_\_\_\_
- Building in time for client learning and reflection \_\_\_\_\_
- Soliciting feedback from the client and others \_\_\_\_\_
- Taking time to reflect on my own learning \_\_\_\_\_
- Acknowledging both successes and failures \_\_\_\_\_
- Finding ways to celebrate \_\_\_\_\_

**II. Use expertise, influence, and personal skills to facilitate a client-requested change without formal authority to implement recommended actions**

- Listening and understanding clients' points of view \_\_\_\_\_
- Supporting and not judging a client \_\_\_\_\_
- Helping to explore alternatives without pushing solutions \_\_\_\_\_
- Clarifying my role--expert or process \_\_\_\_\_
- Establishing rapport easily \_\_\_\_\_
- Being comfortable with ambiguity \_\_\_\_\_
- Developing a business partnership with my client \_\_\_\_\_
- Committing to clients' success \_\_\_\_\_
- Having credibility and trust with clients and others in the organization \_\_\_\_\_
- Confronting unpleasant issues with my clients \_\_\_\_\_
- Being sensitive to my clients' feelings \_\_\_\_\_

- Helping clients see their own issues \_\_\_\_\_
- Giving sensitive feedback in a way it can be heard \_\_\_\_\_
- Discussing feelings appropriately \_\_\_\_\_
- Choosing the right time to discuss bad news \_\_\_\_\_
- Giving the clients recognition and positive feedback \_\_\_\_\_
- Inspiring clients' confidence in my ability \_\_\_\_\_
- Drawing out hidden information or feelings \_\_\_\_\_
- Actively listening and clarifying my understanding \_\_\_\_\_
- Creating a safe environment for clients to express feelings \_\_\_\_\_
- Asking questions that provoke further thought \_\_\_\_\_
- Helping clients to see and value their own competence \_\_\_\_\_
- Seeing the clients realistically \_\_\_\_\_
- Maintaining relationships with prior clients \_\_\_\_\_
- Positioning myself when entering new organizations \_\_\_\_\_
- Understanding business/culture of client organization \_\_\_\_\_
- Maintaining balance between being supportive and thinking critically \_\_\_\_\_
- Maintaining confidentiality \_\_\_\_\_
- Collaborating with other functions and external vendors \_\_\_\_\_
- Seeing organizational challenges as opportunities \_\_\_\_\_
- Working across boundaries both internal and external \_\_\_\_\_
- Being sensitive to issues of cultural difference \_\_\_\_\_
- Offering appropriate and timely information \_\_\_\_\_
- Using receptive influence skills effectively \_\_\_\_\_
- Using expressive influence skills effectively \_\_\_\_\_
- Balancing receptive and expressive influence behaviors \_\_\_\_\_
- Using coaching to build clients' skills as appropriate \_\_\_\_\_

### **III. Leverage expertise with honed consulting skills and self-development**

- Working easily with authority figures \_\_\_\_\_
- Letting others take the credit \_\_\_\_\_
- Saying no without guilt or fear \_\_\_\_\_
- Managing my fear of rejection \_\_\_\_\_
- Taking responsibility for my actions \_\_\_\_\_
- Understanding my stewardship role \_\_\_\_\_
- Turning off my issues and listening to the client \_\_\_\_\_
- Resisting finger-pointing or blaming \_\_\_\_\_

- Limiting tendency to toot my own horn too much \_\_\_\_\_
- Being willing to promote the work I do appropriately \_\_\_\_\_
- Staying grounded and centered when under pressure \_\_\_\_\_
- Finding meaning and purpose in my work \_\_\_\_\_
- Knowing my boundaries and limitations \_\_\_\_\_
- Promising only what I can deliver \_\_\_\_\_
- Working with people I don't particularly like \_\_\_\_\_
- Working through my personal self-management issues \_\_\_\_\_
- Investing in both personal and professional development \_\_\_\_\_
- Practicing integrity \_\_\_\_\_
- Maintaining and developing confidence in my skills and ability \_\_\_\_\_
- Practicing the discipline of personal mastery \_\_\_\_\_
- Recognizing my signals of anxiety and tension \_\_\_\_\_
- Holding clear personal and professional values \_\_\_\_\_
- Practicing self-care \_\_\_\_\_
- Using power resources responsibly \_\_\_\_\_

Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_