



# Skills Inventory for Change Agents

**Directions:** Consider the expectations and demands of your current position and your future career goals. Read through the list and rate the items as follows:

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

Some activities may be important to you but are not listed here. Note these for discussion. Go back over the whole list and circle the numbers of the 3 – 4 specific items that you would most like to improve.

## Relationships:

Listen and understand client's point of point	_____
Support and not judge my client	_____
Help explore alternatives without pushing solutions	_____
Clarify role-expert or process	_____
Establish rapport easily	_____
Comfortable with ambiguity	_____
Develop a balanced partnership with my client	_____
Commitment to client's success	_____
Credibility and trust	_____
Confront unpleasant issues with my client	_____
Am sensitive to my client's feelings	_____
Help client see his or her own issues	_____
Comfortable in letting the client know who I am	_____
Give sensitive feedback in way it can be heard	_____
Appropriately discuss feelings	_____
Choose the right time to discuss bad news	_____
Give the client recognition and positive feedback	_____
Inspire client's confidence in my ability	_____
Draw out "hidden" information or feelings	_____
Actively listen and clarify my understanding	_____
Provide safe environment for client to express feelings	_____
Ask questions that provoke further thought	_____
Help client see and value own competence	_____
See the client realistically	_____
Maintain relationships with prior clients	_____
Position myself when entering new organization	_____
<b>Relationship Total (78 Maximum)</b>	_____

## Skills Inventory for Change Agents

### Business and Organization:

- Understand how the business works \_\_\_\_\_
- Understand the business goals and strategies \_\_\_\_\_
- Connect client's need to business strategy or goals \_\_\_\_\_
- Understand the customers' needs \_\_\_\_\_
- Understand the financial drivers of the business \_\_\_\_\_
- Understand the competition and the industry \_\_\_\_\_
- Know the key people in the organization \_\_\_\_\_
- Have an established network of support at all levels \_\_\_\_\_
- Know the organizational culture (norms, values, and so forth) \_\_\_\_\_
- In touch with employee morale and current issues \_\_\_\_\_
- Approach intervention/project with spirit of inquiry \_\_\_\_\_
- Ask open-ended questions to gain needed information \_\_\_\_\_
- Use systems thinking to understand organizational dynamics \_\_\_\_\_
- Work collaboratively with peers in other departments \_\_\_\_\_

**Business and Organization Total (42 Maximum)** \_\_\_\_\_

### Change:

- Know my beliefs and model for change \_\_\_\_\_
- Help my client understand change \_\_\_\_\_
- Sensitive to client's readiness for change \_\_\_\_\_
- Focus on the goals and outcomes to build positive energy \_\_\_\_\_
- Avoid focusing on problems \_\_\_\_\_
- Recognize and use resistance appropriately \_\_\_\_\_
- Help the client create vision of desired future \_\_\_\_\_
- Coach clients to lead change \_\_\_\_\_
- Help members of the client system adjust to change \_\_\_\_\_
- Help clients pay attention to what they want \_\_\_\_\_
- Willing to go slower to go faster \_\_\_\_\_
- Know the change drivers in our business \_\_\_\_\_
- Take a systems view in planning and implementing change \_\_\_\_\_

**Change Total (42 Maximum)** \_\_\_\_\_



## Skills Inventory for Change Agents

### Agreement:

Understand the issue/need before saying yes	_____
Clear about my competence and approach	_____
Check out assumptions and expectations	_____
Negotiate differences for mutual satisfaction	_____
Seek balance of ownership for project	_____
Explain my theoretical foundation and biases	_____
Know the client's wants and goals	_____
Determine how decisions will be made	_____
Accept the client's limits and restrictions	_____
Say no if not strategic	_____
Clarify issues with primary and secondary clients	_____
Find other resources to meet client's needs	_____
Refuse projects when I lack the competence	_____
Assess "relevance and fit" with client needs	_____
Review agreement regularly with client	_____
Check out client's capacity to give attention to project	_____
Address conflicts with agreement promptly	_____
Willing to end project with client's decision	_____
Set realistic goals and timelines for the project	_____
Seek needed resources to support project	_____

**Agreement Total (60 Maximum)** \_\_\_\_\_

### Information and Assessment:

Have the technical skills required	_____
Ask for resources to supplement my skills as needed	_____
Use a framework to analyze the data/information	_____
Identify patterns and themes in the data/information	_____
Identify underlying structures or causes of problems	_____
Use information gathering to involve the client system	_____
Summarize information and analysis clearly and succinctly	_____
Gain an "independent view" of issues	_____

**Information and Assessment Total (24 Maximum)** \_\_\_\_\_

## Skills Inventory for Change Agents

### Feedback:

Prepare my client to hear difficult information	_____
Aware of sensitivities and concerns in my client	_____
Surface and address resistance	_____
Use effective feedback skills	_____
Prepare for data feedback presentation	_____
Use a practical rather than a conceptual approach	_____
Consider concerns of multiple clients in presentation	_____
Present data from client's point of view	_____
Remind client of goals, outcomes, and desired future	_____
Acknowledge positive factors and strengths	_____
Use reframing to present opportunities	_____
Offer alternatives to address the problems	_____
Present the advantages/disadvantages or cost/benefits	_____
Willing to go with the client's choice	_____
<b>Feedback Total (42 Maximum)</b>	_____

### Targets, Strategies, Implementation:

Clarify client's goals and outcomes	_____
Seek alignment with client's desired future	_____
Break down the project into small pieces	_____
Obtain necessary support for the project	_____
Involve those affected by the project	_____
Plan and manage projects	_____
Identify systems and processes to change	_____
Transfer skills and knowledge to client system	_____
Have knowledge base and skills needed for this phase	_____
Involve other functions or specialties as needed	_____
Use a variety of interventions	_____
Make formal presentations	_____
Involve facilitation groups at any level	_____
Understand the dynamics of groups	_____
Comfortable with unpredictable changes	_____
Communicate with all the stakeholders	_____

**Targets, Strategies and Implementation Total (48 Maximum)** \_\_\_\_\_



## Skills Inventory for Change Agents

### Evaluation and Learning:

Provide alternative methods to evaluate  
Help client see quantitative and qualitative results  
Seek client participation in evaluation  
Build in time for client learning and reflection  
Solicit feedback from the client and others  
Take time to reflect on my own learning  
Acknowledge both successes and failures  
Find ways to celebrate

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**Evaluation and Learning Total (24 Maximum)**

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### Best Self:

Work easily with authority figures  
Let others take the glory  
Can say no without guilt or fear  
Manage my fear of rejection  
Accept responsibility for failures or goof-ups  
Understand my stewardship role  
Turn off my issues; listen to client  
Resist pointing fingers or blaming  
Limit tendency to "toot my own horn" too much  
Stay grounded and centered when under pressure  
Work has meaning and purpose  
Know my boundaries and limitations  
Promise only what I can deliver  
Work with people I do not particularly like  
Work through my shadow and other personal issues  
Invest in both personal and professional development  
Practice emotional and energetic integrity  
Confident in my skills and ability  
Practice discipline of personal mastery  
Recognize my signals of anxiety and tension  
Change unproductive or ineffective beliefs  
Clear personal and professional values  
Practice self-care

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**Best Self Total (63 Maximum)**

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(423 maximum skill points possible) **Grand Total**

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Used with permission from Beverly Scott, *"Consulting on the Inside,"* ASTD Press.