



Client-Firm Relationship Scorecard Worksheet

Assessment Area	Score (1-5)	Comments + Examples
Responsiveness		
Communication		
Industry & Business Knowledge		
Value for Money		
Strategic Alignment		
Relationship Factor		
Total (out of 30)		



Client-Firm Relationship Scorecard Worksheet Scoring Legend

Responsiveness

- 1 – **Often slow or unreliable.** *(e.g. Consistently delayed or missed responses)*
- 2 – **High variance in response reliability.** *(e.g. Occasionally misses deadlines or urgency)*
- 3 – **Dependable and within agreed timeframes.** *(e.g. Urgent matters handled adequately)*
- 4 – **Timelines managed proactively.** *(e.g. Anticipates needs, follows up without prompting)*
- 5 – **Always ahead of needs.** *(e.g. Trusted for timely, thoughtful responses that often anticipate items out of scope)*

Communication

- 1 – **Consistently unclear or confusing.** *(e.g. Often needs rework or clarification)*
- 2 – **Generally clear, with some misalignment.** *(e.g. Inconsistent with client preferences)*
- 3 – **Clear and professional.** *(e.g. Meets expectations and needs)*
- 4 – **Tailored and contextual.** *(e.g. Reflects understanding of client use and audience)*
- 5 – **Highly strategic and personal.** *(e.g. Anticipates needs and builds connection)*

Industry & Business Knowledge

- 1 – **Lacks understanding.** *(e.g. Advice misses critical context)*
- 2 – **Basic grasp only.** *(e.g. Needs frequent briefing)*
- 3 – **Sound knowledge.** *(e.g. Handles standard scenarios effectively)*
- 4 – **Proactively informed.** *(e.g. Demonstrates learning, offers value-added insights)*
- 5 – **Deep strategic insight.** *(e.g. Seen as indispensable business partner and a 'strategic edge')*



Client-Firm Relationship Scorecard Worksheet Scoring Legend

Value for Money

- 1 – **Perception of low value relative to cost.** *(e.g. Frequent billing surprises, no transparency)*
- 2 – **Disconnect between expectations and billings.** *(e.g. Low or inconsistent billing transparency and cost justification)*
- 3 – **Predictable billing, and aligned with expectations.** *(e.g. Clear rationale for any variances)*
- 4 – **Value delivered through efficiency and billing transparency.** *(e.g. Proactive cost-savings and no billing surprises)*
- 5 – **Perceived as a financial partner.** *(e.g. Exceptional transparency and proactive cost management)*

Strategic Alignment

- 1 – **Misaligned.** *(e.g. Little connection to business goals)*
- 2 – **Some alignment.** *(e.g. Often misses broader strategic considerations)*
- 3 – **Aligned and supportive.** *(e.g. Understands business goals and supports broader strategy)*
- 4 – **Actively integrates and expands on strategy.** *(e.g. Suggests aligned opportunities outside immediate mandates)*
- 5 – **Fully-integrated strategic partnership.** *(e.g. Legal work is informed by business vision and advances long-term goals)*

Relationship Factor

- 1 – **Purely transactional.** *(e.g. No sense of personal connection or loyalty)*
- 2 – **Infrequent rapport.** *(e.g. Limited meaningful interaction)*
- 3 – **Consistently professional rapport.** *(e.g. Trust exists, but communication remains largely project-based)*
- 4 – **Personally and professionally engaged.** *(e.g. Loyalty is developing, relationship reinforced by positive experiences)*
- 5 – **Deeply embedded, loyal partner.** *(e.g. Mutual value and investment, seen as integral and irreplaceable)*