

A woman with blonde hair, wearing a grey sweater, is looking up at a man who is leaning over her. The man is wearing a brown shirt. They appear to be in a meeting or collaborative work environment. The background is slightly blurred, showing what might be office equipment or a window.

Consultant's  
Consultant

# CLIENT REQUEST PROFILER

If you say yes too often.  
If you feel overloaded.  
If you need to do more  
**GREAT** work.

CREATED BY  
**CINDY TONKIN**

# Client Request Profiler

By Cindy Tonkin

## Use this tool if you:

- know you say yes too often.
- work too many long days.
- missed a deadline (or nearly).

You may say yes when you should be saying No.  
But you're concerned about keeping the relationship.

Remember when you say yes to one thing, you're saying no to another.

## Use it between getting a brief and moving forward

This Profiler encourages you to reflect on client opportunities.  
So don't say yes straight away: **Your response is let me get back to you.**

And then use the Client Request Profiler to help you decide whether or not you will not be able to do the job or under what conditions you need to say yes.

This will allow you to evaluate the opportunity so that you can give the best quality advice.

To do Great Work (not just ordinary work!) take a moment after you've taken your brief and go through these questions.



# Client Request Profiler

Who is asking?

What do they want?

What's your first response?

I want to say ☐ Yes ☐ No

Now analyse it

☐ the time frame works

**I have the:**

- ☐ time
- ☐ authority to say yes
- ☐ expertise

**It is:**

- ☐ the smartest way to approach the problem they want to solve
- ☐ what we do
- ☐ on brand
- ☐ a priority
- ☐ aligned with the strategy
- ☐ the right size (not too big)
- ☐ legal
- ☐ possible
- ☐ in scope
- ☐ a good idea
- ☐ a good return on investment
- ☐ a good use of my time

**I can:**

- ☐ meet their deadline
- ☐ provide the quality they want
- ☐ do it for the price they want to pay

**Am I being:**

- ☐ A doormat and letting people walk all over me? (if so, say no)
- ☐ Flexible?
- ☐ Helpful?
- ☐ Generous?

So now what's your response?

I want to say ☐ Yes ☐ No

**I need**

- ☐ A reason
- ☐ Backup
- ☐ A way to make no sound like yes

What are the constraints?

Make that No feel like a Yes.



Talk to me about how you could work with this tool and others like it to make your team work smarter, faster and nicer.

Call **+61 412 135 426** or book a time for me to call you at **[cindytonkin.com/chat](https://cindytonkin.com/chat)**.

Listen to my podcast where Data Science Leaders talk about how they work smarter, faster and nicer at **[smarterdatapeople.com](https://smarterdatapeople.com)**

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