

Practice Development Series

Module 5: Discovery / Activity 1 – Effective Listening Assessment

Aligned with the PFA™ Designation Program

Instructions: Think back to the last three fact finding interviews you have conducted. How often did you engage in the effective listening habits shown in the table below? Review each of the listening habits and rate the frequency with which you practice the skill. Check the box for the frequency that is most applicable to you and calculate your total when completed. A higher score suggests you utilize effective listening skills consistently, while a lower score indicates you need more practice. Try to be as honest as possible with your self-assessment.

Frequency			
Listening Habit	Often (10)	Sometimes (6)	Rarely (2)
1. You are genuinely interested in what the prospective client is saying.			
2. You observe non-verbal behaviour.			
3. You listen for both facts and emotional information.			
4. You help clients to expand on their statements to clarify their goals.			
5. You avoid mentally disagreeing or judging the prospective client if they say something that is not aligned with your opinion.			
6. You are attentive when clients speak, and take effective notes to ensure clarity.			
7. You allow clients to completely answer a question, or finish their thoughts, even if it requires silence.			
8. If you are unclear what a client means, you ask for further clarification.			
9. You paraphrase your understanding of the prospective client's goals at the end of the meeting to ensure clarity.			
10. You ask clients to identify priorities and timelines.			
Total Points:			

